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FEI SYSTEMS

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Introduction

This user guide has been prepared for all instances of WITS. It serves as an introduction to acclimate the user to the new Enhanced WITS Architecture – Staff Model Changes. This guide will focus on the Staff Module and take the user through a step by step process of how to view and enter data in this module. In addition, this guide will highlight key differences in WITS Prime vs. WITS EA Staff Module.

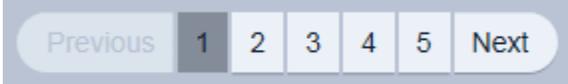
Please review the WITS EA Basics section of this document as it highlights new icons and topics features you will come across as you begin using the new Staff Module.

WITS EA

Basics

The Basics section acquaints the user with new icons and features used throughout the staff module.

	<p>Add: Allows the user to add data to the panel or section.</p>		<p>Edit: Allows the user to edit information on a panel or section.</p>
	<p>Remove: Allows the user to delete information in the panel or section.</p>		<p>Lock: Allows the user to lock an item.</p>
	<p>History: Allows the user to view the changes made on the current page.</p>		<p>Panel View: Presents data in a panel by panel view.</p>
	<p>Table View: Presents data in a table format.</p>		<p>Export: Allows the user to export results.</p>
	<p>Column Selector: Allows the user to select the columns that they would like to view.</p>		<p>Hover Text: When you hover over an item or symbol text describing the item may appear.</p>

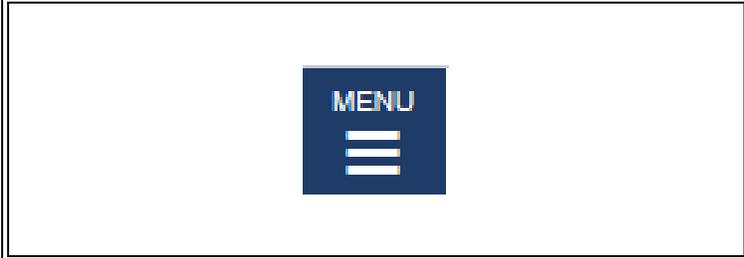
 <p>From: ●●● To: 123</p>	<p>Eye Icon: Allows the user to see protected information hidden by dots. By hovering over the icon they can now see the actual information contained within the field.</p>
	<p>Error Message: The error message is localized and is generated where the error occurred.</p>
	<p>Required Field: Has a red bar to the right of the field. User must enter data to save.</p>
	<p>Discretionary Field: Is not a mandatory field to complete the panel and will not affect the completion or saving of a record.</p>
	<p>Pages: Allows the user to page through all search results.</p>



Date Picker: Allows the user to pick a date from a calendar.



Likert Scale: Presents information visually and allows for quick interpretation of the data.



Collapsible Menu: The left hand navigation menu is collapsible in WITS on the Staff Member and System Account screens. When it is collapsed you will only see the icon to the left. When it is un-collapsed you will see the entire left hand navigation panel.

New Screen Features

The screen mockups for the Staff Member Search and Staff Member Profile screens serve to acquaint users with the new layout and to point out new features in the WITS that a user can leverage when using the system.

Staff Member Search Screen

The screenshot displays the HI-WITS QA Staff Member Search interface. Key features and annotations include:

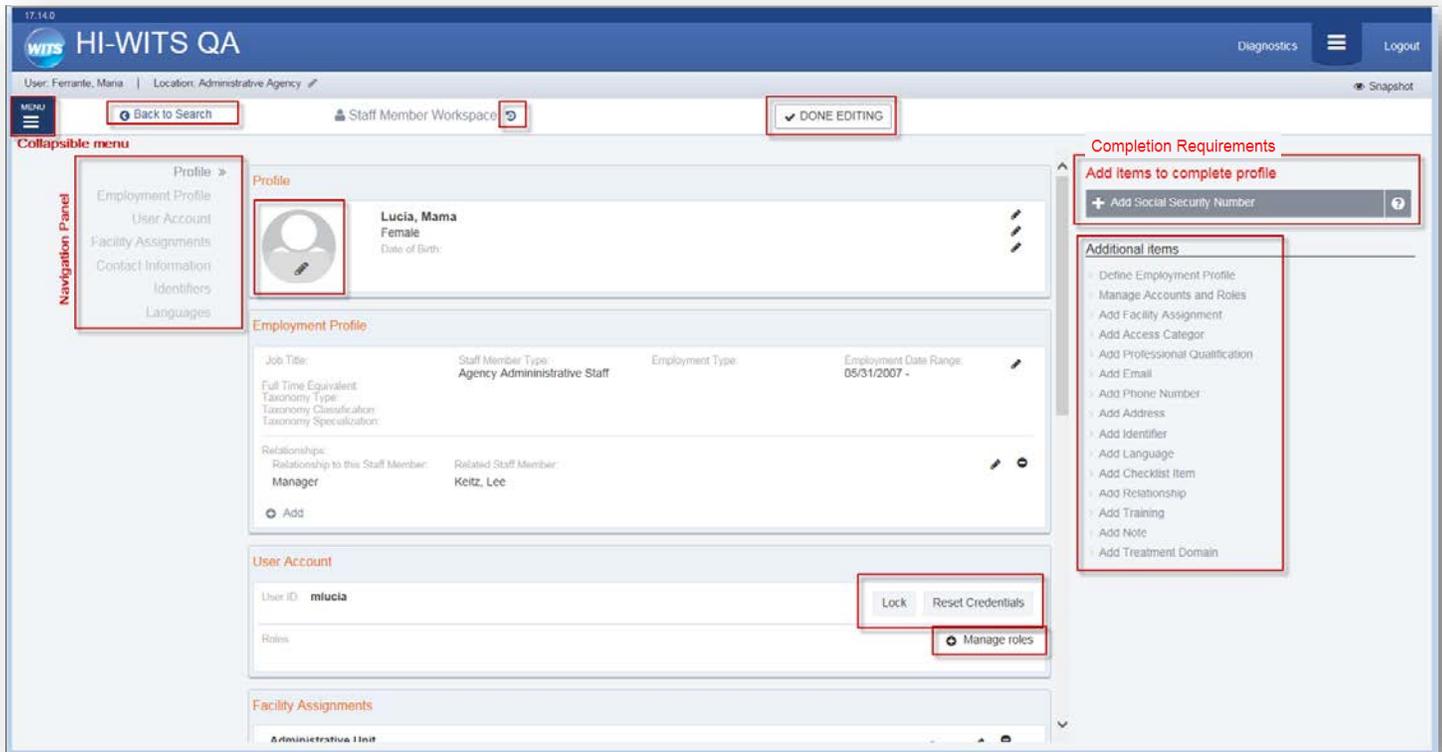
- Collapsible Menu:** Located on the left side of the page.
- Enhanced search options:** A search bar with a "Search" button and a "Create New Staff Member" link.
- Page through results:** A pagination control showing "Showing 1-31 of 31" and "Sort columns alphabetically".
- Select Columns:** A dropdown menu for selecting columns to display, with a note: "Select only column headers you wish to view".
- Table View:** A table listing staff members with columns for First Name, Last Name, Agency, and Email. A "Screen View #1 Grid Table View" annotation points to the table.
- Profile View:** A detailed view of a staff member's profile, including fields for Agency and Email, with "Lock" and "View Profile" buttons. A "Screen View #2 Panel View" annotation points to this view.

First Name	Last Name	Agency	Email
Zler	Mahony	Administrative Agency	ikeltz@feinfo.com
Bill	Magro	Administrative Agency	Bill.Magro@feisystems.com
Mama	Lucia	Administrative Agency	mtbungle53@hotmail.com
7411		Administrative Agency	skumar@feinfo.com
7911		Administrative Agency	skumar@feinfo.com
16737		Administrative Agency	mark.woods@feisystems.com
Start Management	Access	Administrative Agency	ronney@feinfo.com
Mara	Loey	Administrative Agency	mara.loey@feisystems.com
Mari	Howard	Administrative Agency	mhoward@dhmh.state.md.us
Mart	Choinski	Administrative Agency	mchoinski@feinfo.com
Marrion	Haas	Administrative Agency	msarhy@feinfo.com
Lieberman	Samuel	Administrative Agency	Zeesawn.KRanaatorora@feisystems.com
Amarvir	Brar	Administrative Agency	abrar@feinfo.com
Maksym	Moyseyev	Administrative Agency	maksym.moyseyev@feisystems.com
Mahandeen	Kathrina	Administrative Agency	Mahandeen.Kathrina@feisystems.com

Staff Member Search Screen Features

1. **Collapsible menu**- allows more horizontal on screen real estate
2. **Searches:**
 - a. *Simple Search*- searches through the columns that are currently displayed on screen for the values that were entered. It is a “contains” type of search.
 - i. Customize this by adding selected columns to show on screen
 - ii. New UI searches as you type
 - iii. Matching search results highlighted.
 - b. *Advanced search*- enables you to choose search criteria and save those searches to your computer via a cookie.
 - i. Allows the user to search columns that they choose.
 - ii. Save your advanced searches
 - iii. Matching search results highlighted.
3. **Page through search results**- search results are not limited but will be shown a page at a time.
4. **View of data**
 - a. *Table View*-Shows the data as a list of rows and columns.
 - b. *Panel view* –Shows the data as a list of panels.
5. **Staff Member List**
 - a. *Column Headers*
 - i. Sorts staff members by the selected columns when clicked.
 - ii. The user can customize which columns are displayed.
 - b. These preferences are saved to your computer only.

Staff Member Profile Screen



Staff Member Profile Screen Features

1. **Collapsible menu**- allows more horizontal screen real estate.
2. **Panels**- are seen only if they have data, eliminating long lists and multiple screens.
 - a. Panels are designed for information presentation rather than data entry.
3. **Completion Requirements** - define the requirements for an item to be complete.
 - a. Profile completion is tracked. You add the Staff Member information and save immediately.
 - b. Completion Requirements shows you what is missing.
4. **Domain event history**
 - a. Tracks all operations / changes in reverse chronological order. Currently only key fields are displayed so you understand the key operations performed.
 - b. Enables the user to see more audit records.
5. **Dropdowns now have paging** – helping to manage many values in a long dropdown.
6. **Ease of printing**- displays the panels without all the extra spacing and formatting.

Print Preview

1 Page View Shrink To Fit

HI-WITS QA Page 1 of 2

Profile

 **Duckie, Rubber, LCP**
Male
Date of Birth: 08/25/1982

Employment Profile

Job Title: Administrator	Staff Member Type: Administrative Staff Full Time Equivalent: Full Time	Employment Type:	Employment Date Range: 12/06/2014
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Taxonomy Type:
Behavioral Health & Social Service Providers
Taxonomy Classification:
Marriage & Family Therapist
Taxonomy Specialization:

Relationships:

Relationship to this Staff Member: Manager	Related Staff Member: Davidson, Harley
--	--

User Account

User ID: **rduokle**

Roles:

- Activate/Deactivate System Accounts
- Agency Invoicing (Full Access)
- Authorization Reopen
- Agency H999 Management
- Assessments (Read-Only)
- Can Grant/Revoke NOMS Administrator

Facility Assignments

Administrative Unit	05/02/2015
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Program Assignments:

Professional Qualifications

License	Licensed Clinical Psychologist	Johns Hopkins University
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Contact Information

Preferred Method Of Contact:

	maria.ferrante@felisystems.com	Primary
	Mobile	478-698-6686
	Home 1515 Queck Queck Lane Honolulu, Hawaii 21396 Coordinates: Years of stay:	

<https://hi-qa.p2.witsweb.org/p/> 6/9/2015

Page 1 of 2

Accounts

WITS EA introduces two types of accounts, a System Account and an Agency Account.

A System Account is the overarching account which allows users such as WITS Administrators to have the same roles in all Agencies in WITS. Any user's login information also lives here as the System Account represents the user's login to the system. In contrast, the Agency Account is where the System User's Staff Member record is created, and where the user's roles or permissions in that agency are created and live.

In the screenshot below, you can see the System Account for user "jconrad". This user has cross-agency roles such as "WITS Administrator". You can also see that this user has a Staff Member record in the Administrative Agency. Note that the user has no assigned roles within the Administrative Agency. This user's roles will carry over to every agency from the System Account role assignments.

The screenshot shows the WITS HI-WITS QA user interface. The top navigation bar includes the WITS logo, the text "HI-WITS QA", and links for "Diagnostics" and "Logout". Below the navigation bar, the user's name "User: Ferrante, Maria" and location "Location: Administrative Agency, Administrative Unit" are displayed. The main content area is divided into a left sidebar menu and a main profile view. The sidebar menu includes options like "Home Page", "Agency", "Clinical Dashboard", "Client List", "System Administration", "Code Tables", "IP Whitelist Administration", "System Accounts", "Activity Management", "Adjudication Rule", "Services", "Rates", "H835 Management", "H999 Management", "H837 Management", "System Info", "Agency Oversight Assignment", "Config Editor", "Alert Types", "Master Patient Index", "CDP Legacy Extract", "Client Survey", "My Settings", and "Reports". The main profile view shows the user's name "jconrad" and status "Active". Below this, the user's details are listed: "Jennifer Conrad", "jennifer.conrad@feinfo.com", and "Unknown". The "Roles" section lists various permissions, including "Agency Billing", "Client Confidential", "Clinical (Full Access)", "Encounter (Delete)", "Facility Billing (Full Access)", "Payor Adjudication", "Reports Access", "WITS Billing Administrator", "Billing Encounter List", "Client Diagnosis", "Create Agency Claim Batch", "Facility Administrator", "Manage Treatment Team Groups", "Program Set Up", and "WITS Administrator". The "Agency Accounts" section shows the user's record in the "Administrative Agency" with no roles assigned.

Agency Accounts versus System Accounts

- a. **Old Structure:**
 - i. Every user had an account under an agency. Some users had cross-agency roles assigned within that agency.
- b. **New Structure:**
 - i. A System Account represents a user's login to the system.
 - ii. An Agency Account lives under a system account, and represents a user's access to a particular agency.
 - iii. Everyone who has access to WITS (a login) has both a System Account and an Agency Account.
 - iv. When a user logs into WITS they receive both the system account roles and the agency account roles.
 - v. In place of the old "Staff List" you will see the "Staff Members" menu. This area allows for searching, additions and updates of a user's account within the context agency.
 - vi. Staff who are set up in WITS but do not have a login are found simply under the Agency - > Staff Members menu item, in their context agency. These individuals do not have a System Account or an Agency Account.
 - vii. There is also a System Accounts menu item under System Administration. As a WITS administrator, you will be able to see All System Accounts and Agency Accounts across the system.
- c. **Agency – Staff Members:** Agency Accounts as well as Staff Member information is available at the Staff Member menu item.
 - i. You will use the Staff Member screens (in the context of an agency) to set up any new user.
 1. As soon as you add the Account information, WITS will create both a System Account and an Agency Account.
 2. All Agency Account roles can be assigned here.
 3. If you need to give a new user cross-agency access roles (such as WITS Administrator, Agency Full Access, ATR Administrator, SBIRT Administrator, Agency Oversight, etc.), you will go to the System Administration – System Account menu item to do this.
 - ii. You will set up Staff Members who do not have access to WITS (who do not have an account) here.
- d. **System Administration – System Accounts:**
 - i. This area will primarily be used to find all of a user's Agency Accounts and compare to their system account, as well as to give roles to the System Account.
 1. Any user who has cross agency access roles, may in fact have a different set of permissions their Agency Account.
 - ii. This area is also used to add cross-agency role access for specific staff who need those roles.

e. Migration of current users:

- i. Users who were authorized for any type of cross-agency access will find that those roles are visible and modifiable available through System Administration – System Account. Their Staff Account (at the agency level) will have no roles.
- ii. All other users (those who were not authorized for any type of cross-agency access) will find that they have a System Account and a Staff Member profile with the appropriate roles assigned to them, as they were assigned previously.

Staff Members

A staff member is a member of the staff of that agency. Staff members live at the Agency level.

Searching For a Staff Member

To begin:

1. Ensure you are in the proper agency prior to searching for a staff record in that agency.
2. In the left menu, click **Agency**, then **Staff Members**.

Note: The Staff Member menu item was previously called Staff List.

17.21.1

WITS HI-WITS QA

Diagnostics Logout

User: Ferrante, Maria | Location: Administrative Agency, Administrative Unit

Snapshot

Home Page

Agency

Agency List

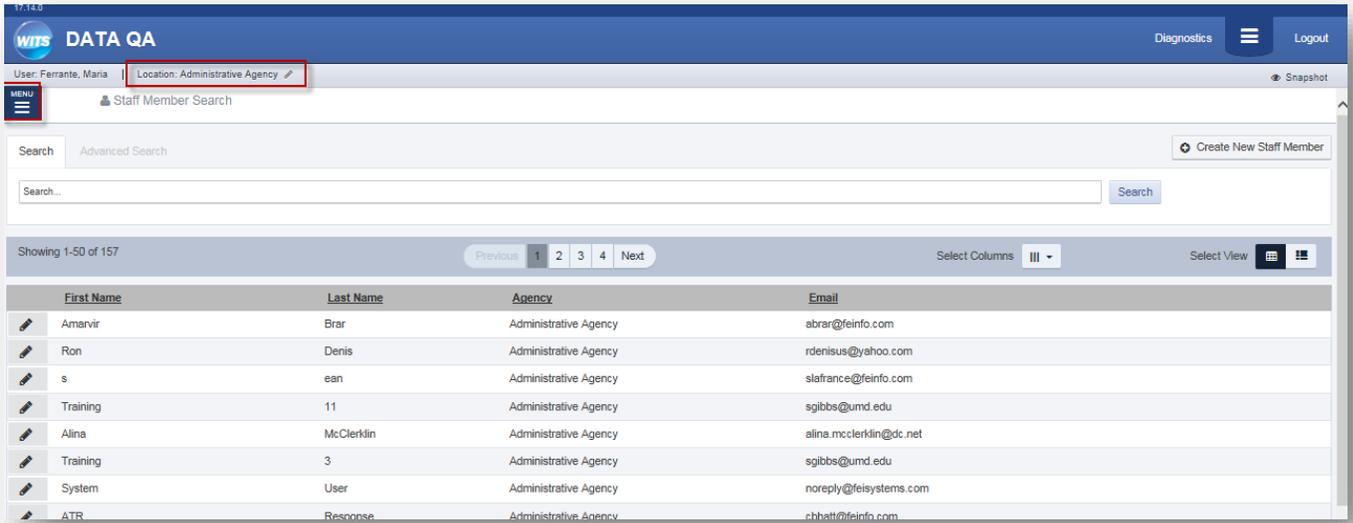
- Agency Profile
- Aliases
- Contacts
- Governance
- Relationships
- Announcements
- Referrals
- Removed Consents
- Wait List
- Deleted Clients
- GPRA Discharge Due
- GPRA Follow-up Due
- Facility List
- Staff Members**
- Tx Team Groups
- Billing
- Contract Management

Agency List

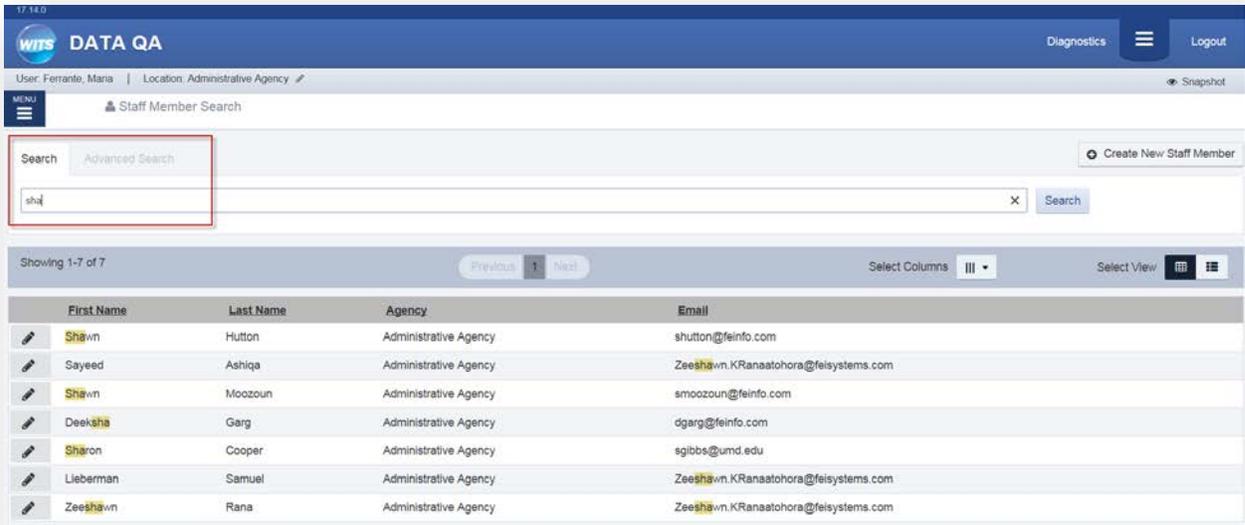
Add New Agency Record

Actions	Name	Display Name	Description
	1HTC Agency - C	1HTC Agency -C	Contractor
	1HTC-Agency-Prov	1HTC-Agency-Pro	Provider
	Administrative Agency	Admin Agency	WITS System Administration
	Adult Mental Health Division	AMHD	
	Alcohol and Drug Abuse Division	ADAD	SSA/Treatment Services Contractor
	Alcoholic Rehabilitation Services of Hawaii, Inc	ARSH	
	Aloha House, Inc	Aloha House	
	ATR 3 CM	ATR 3 CM	Case Manager (non-military assessor agency)
	ATR Contractor	ATR Contractor	ATR RSS Contractor
	ATR3 Provider	ATR3 Provider	
	ATR3b	ATR3b	
	AutomatedTest-Provider	AutomatedTest	Automated Test Provider - This provider agency is for Automated Testing. Please refrain using this agency for regular testing.
	Automation Agency 1 - Case Management	Auto Agency 1	Automation Agency 1 - Case Management
	Automation Agency 2 - ATR Contractor	Auto Agency 2	Automation Agency 2 - ATR Contractor

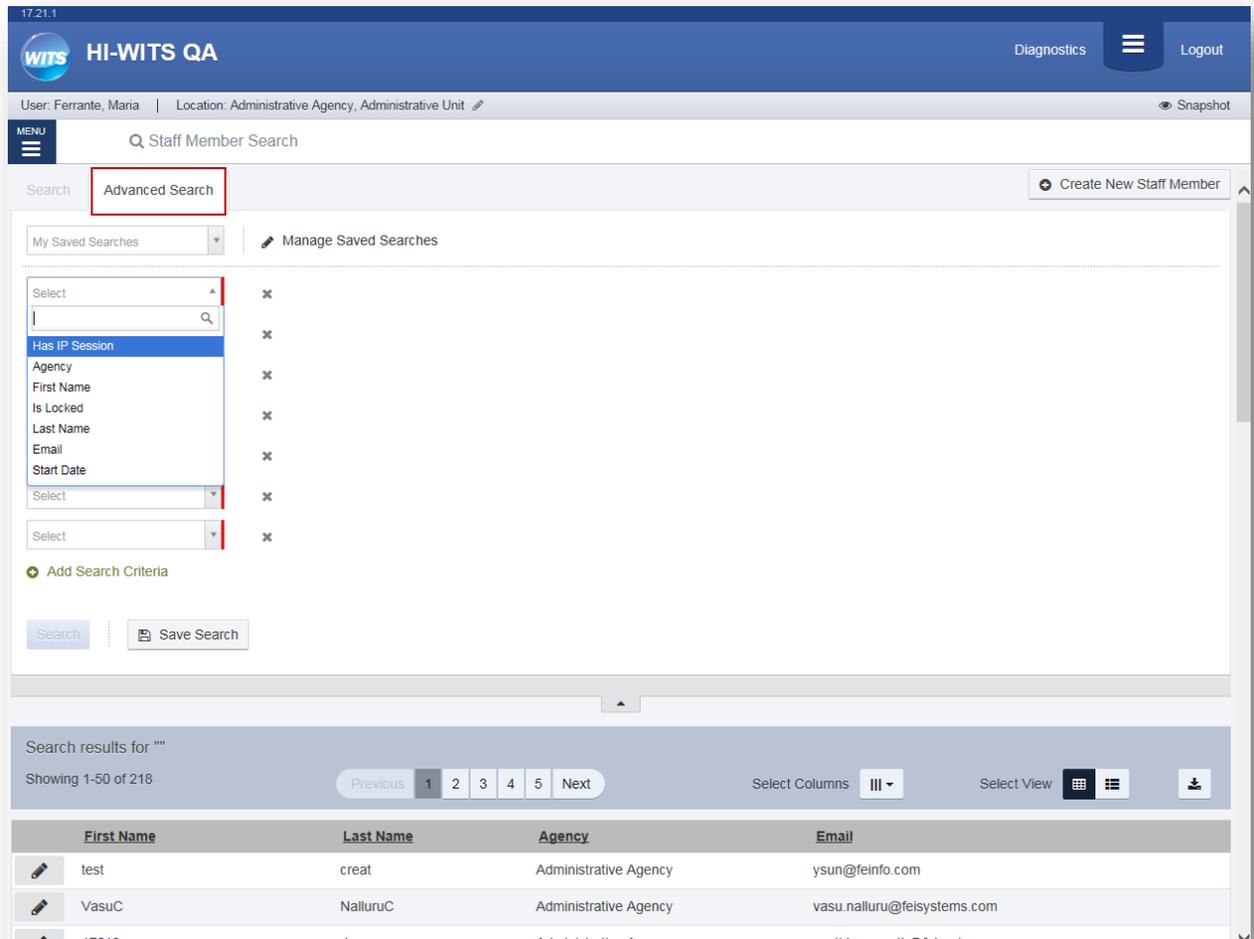
3. The new Staff Member screen will open.



4. To search for an existing Staff Member, begin by typing the staff members name in the simple search. As you begin to type the staff members name, the list screen begins to filter and the corresponding characters in those records are highlighted in yellow.



- Or, search for an existing Staff Member by creating a custom search by using the advanced search.



Note: When in an agency and searching for a staff member whether the user is either using a simple search or advanced search users can only search for a staff member in the agency that they are currently in. If they would like to search for a staff member across all agencies they can do so by clicking on System Administration followed by clicking on System Accounts and conduct their search.

Advanced Search: Is Locked and Has IP Session

Two new features in the Advanced Search are “Is Locked” and “Has IP Session”.

- ❖ **Is locked** represents the state a user is put in intentionally by an administrator or as a result of getting locked out due to invalid password attempts.
- ❖ **Has IP Session** is equivalent to the Release Lock in WITS Prime. That’s when someone forgets to log off before closing a browser on one PC and then tries to login from another with a different IP.

Through the Advanced Search on the **Staff Member Search** screen you have the ability to conduct a query for either.

The screenshot shows the WITS HI-WITS QA interface. The top navigation bar includes the WITS logo, the text "HI-WITS QA", and links for "Diagnostics" and "Logout". Below the navigation bar, the user's name "User: Ferrante, Maria" and location "Location: Administrative Agency, Administrative Unit" are displayed. The main content area is titled "Staff Member Search" and features a search bar with "Advanced Search" selected. Below the search bar, there are options for "My Saved Searches" and "Manage Saved Searches". The search criteria are defined in a table:

Criteria	Value
Is Locked	True
Has IP Session	False

Below the search criteria, there are "Search" and "Save Search" buttons. The search results are displayed in a table with the following columns: First Name, Last Name, Agency, Email, and Identifier. The results show four staff members:

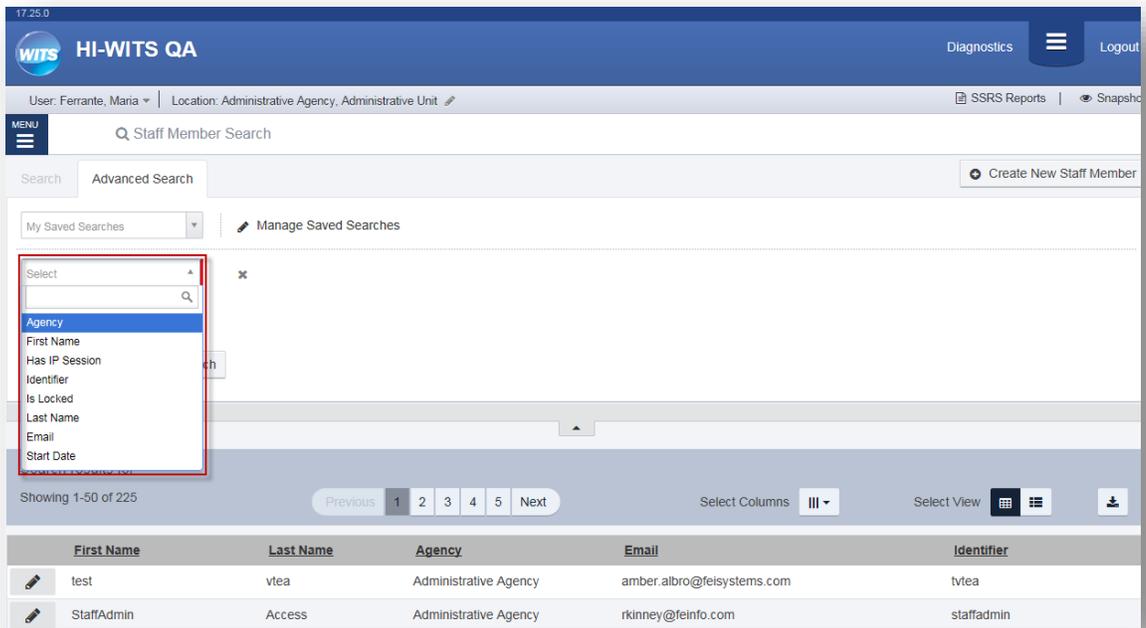
First Name	Last Name	Agency	Email	Identifier
test	vtea	Administrative Agency	amber.albro@feisystems.com	tvtea
StaffAdmin	Access	Administrative Agency	rkinney@feinfo.com	staffadmin
Bill	Bassler	Administrative Agency	Bill.Bassler@feisystems.com	BBassler
David	Webb	Administrative Agency	david.webb@feisystems.com	dwebb

1. To begin on the left hand navigation click on **Agency** followed by **Staff Members**.
2. Next, on the **Staff Member Search** Screen click on the **Advanced Search** tab followed by **Add Search Criteria**.

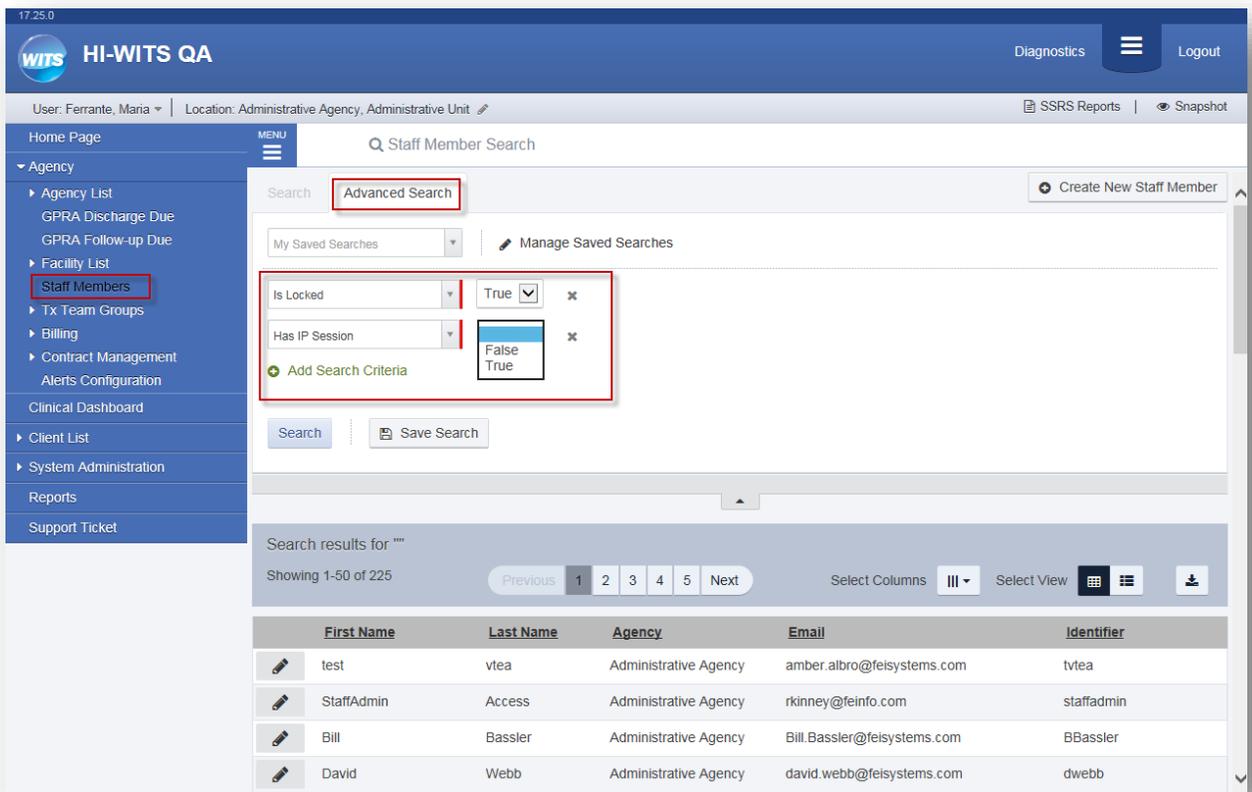
The screenshot shows the WITS HI-WITS QA interface. At the top, there is a header with the WITS logo, 'HI-WITS QA', and navigation links for 'Diagnostics' and 'Logout'. Below the header, the user information is displayed: 'User: Ferrante, Maria' and 'Location: Administrative Agency, Administrative Unit'. The main content area is titled 'Staff Member Search' and features a search bar with the 'Advanced Search' tab selected. Below the search bar, there is a section for 'My Saved Searches' and a 'Manage Saved Searches' link. A red box highlights the 'Add Search Criteria' button. Below this, there are 'Search' and 'Save Search' buttons. The search results section shows 'Search results for ""' and 'Showing 1-50 of 225'. The results are displayed in a table with columns for 'First Name', 'Last Name', 'Agency', 'Email', and 'Identifier'. The table contains three rows of data.

First Name	Last Name	Agency	Email	Identifier
test	vtea	Administrative Agency	amber.albro@feisystems.com	tvtea
StaffAdmin	Access	Administrative Agency	rkinney@feinfo.com	staffadmin
Bill	Bassler	Administrative Agency	Bill.Bassler@feisystems.com	BBassler

3. A blank field appears with Search in it. Click on the down arrow which displays all of the values you can search for. Select your desired value. (In this example we will select either Has IP Session or is Locked)

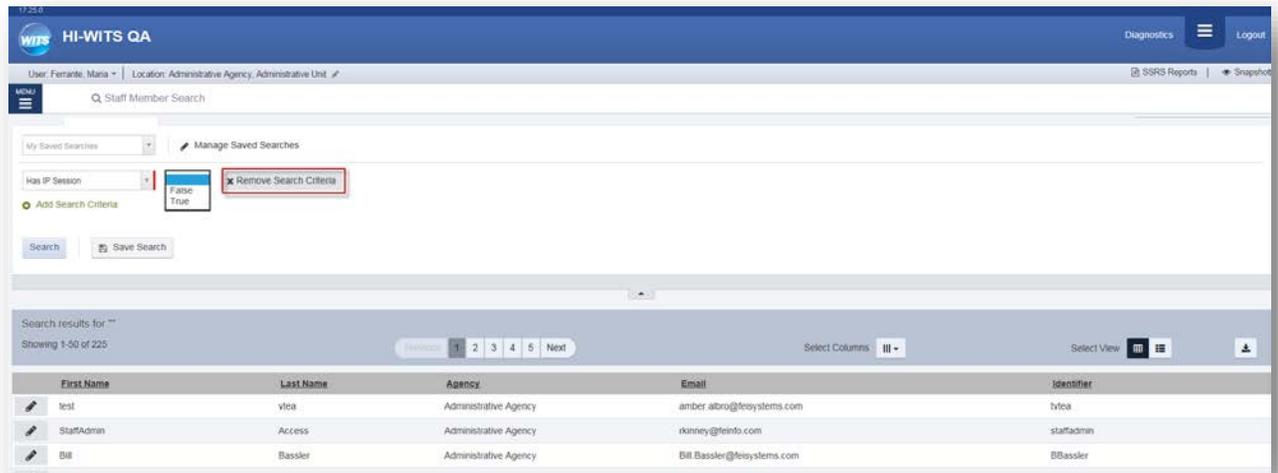


4. A field appears to the right of the value you just selected. Now select **True** or **False**.



5. Click **Search** to display your results.

- To clear your search results and query, next to each field click the X. If you happen to hover over the X you will see its description *Remove Search Criteria* appears.



Creating a Staff Member

1. Ensure you are in the proper agency prior to creating a staff record for that agency.
2. To create a new staff member click the **Create New Staff Member** link to open the **Staff Profile** screen.

The screenshot shows the HI-WITS QA web application interface. The header includes the WITS logo, the text 'HI-WITS QA', and navigation links for 'Diagnostics' and 'Logout'. Below the header, the user profile shows 'User: Ferrante, Maria' and 'Location: Administrative Agency, Administrative Unit'. The main content area is titled 'Staff Member Search' and features a search bar with a 'Search' button. A red box highlights the 'Create New Staff Member' link. Below the search bar, there is a table of staff members with columns for First Name, Last Name, Agency, and Email. The table shows five rows of data.

First Name	Last Name	Agency	Email
test	creat	Administrative Agency	ysun@feinfo.com
VasuC	NalluruC	Administrative Agency	vasu.nalluru@feisystems.com
17613	doc	Administrative Agency	scott.kramperth@feisystems.com
Me	Voy	Administrative Agency	sean.lafrance@feisystems.com
Miles	Standish	Administrative Agency	michael.walker@alaska.gov

3. On the **Create New Staff Member** screen, enter the required information (indicated by a red bar to the right of the field) including:
 - a. **First Name**
 - b. **Last Name**
 - c. **Gender**
4. When complete click **Create**. You will then be taken to the Staff Member **Profile** screen.

Prefix

First

Preferred

Middle

Last

Suffix

Gender

Create Cancel

Tip: The create button will remain un-active until all required fields have been completed.

Creating a Staff Member's Profile

The screenshot shows the HI-WITS QA interface. At the top, the user is identified as 'User: Ferrante, Maria' and the location as 'Administrative Agency, Administrative Unit'. The main content area displays a profile for 'Duckie, Rubber', a male staff member. The profile includes a placeholder image of a rubber duck and a 'Date of Birth' field. To the right of the profile is a 'Completion Requirements' section with three items: 'Add Email Address', 'Add Employment Start Date', and 'Add Staff Member Type'. Below this is an 'Additional items' list with various options like 'Define Employment Profile', 'Manage Accounts and Roles', etc. A 'Tip' box at the bottom left provides instructions on how to complete the profile.

Tip: Now that you have created a staff member, on the profile panel enter in the staff member's date of birth and picture.

1. Use the **Completion Requirements**, to complete the Staff Member's profile with the required information including:
 - a. **Add Email Address**
 - i. To begin, click on **Add Email Address** under the **Completion Requirements** section.
 - ii. Enter the email address.
 - iii. Click **Save**.
 - iv. After adding an email address you can also add:
 1. Add a phone number for the staff member.
 2. Add an address.
 3. Select the preferred method of contact.

The screenshot shows a 'Contact Information' panel with a title bar. Below the title bar is a section titled 'Preferred Method Of Contact:'. This section contains a dark grey form with an envelope icon on the left. Inside the form, there is a label 'Email Address:' followed by a text input field containing 'rubber.duckie@hi.org'. Below the input field is a checkbox labeled 'Primary'. At the bottom of the form are two buttons: 'Save' and 'Cancel'. Below the form, there are two sections, each with a telephone icon and a location pin icon. Each section contains the text 'No Items' and an 'Add' button with a plus sign icon.

If additional Contact Information needs to be added click **Add** under the corresponding section of the panel and repeat the above steps.

Tip: When adding email addresses make sure to designate one as primary by checking the primary box as this will determine the email account where the staff member will receive their WITS login information.

b. **Add Employment Start Date & Add Staff Member Type**

- i. To begin, click on **Add Employment Start Date** under the **Completion Requirements** section. The **Employment Profile** screen shown below opens.
- ii. Enter the **Employment Start Date**.
- iii. Note: The **Staff Member Type** which is the next item on the completion module is also on this screen.
- iv. Select the **Staff Member Type**.
- v. Complete any additional fields as necessary.

The screenshot shows the 'Employment Profile' form with the following fields:

- Job Title: Select
- Staff Member Type: Select (indicated by a red arrow)
- Employment Type: Select
- Employment Date Range: [Calendar icon] - [Calendar icon] (indicated by a red arrow) Has end date
- Full Time Equivalent: Select
- Taxonomy Type: Select
- Taxonomy Classification: Select

vi. Click **Save**.

i. *The panel now appears as below.*

c.

The screenshot shows the 'Employment Profile' form after saving. The fields are:

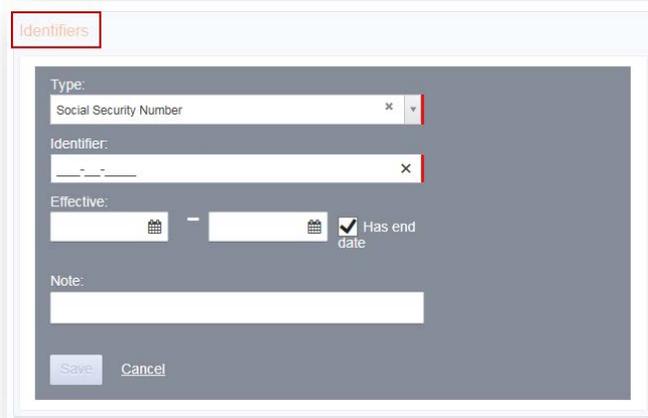
- Job Title: [Empty]
- Staff Member Type: Administrator
- Employment Type: [Empty]
- Employment Date Range: 08/17/2014 - [Empty]
- Full Time Equivalent: [Empty]
- Taxonomy Type: [Empty]
- Taxonomy Classification: [Empty]
- Taxonomy Specialization: [Empty]
- Relationships: Add

o

c

ial Security Number (This field may or may not show up in the completion module

depending on whether or not you have this as a required field in WITS Prime, however, it does show up in the **Additional items** list under **Identifiers** for everyone to use).



1. To begin, click on **Add Social Security Number** under the **Completion Requirements** section and the **Identifiers** screen above appears.
2. Choose **Social Security Number** as the **Type of Identifier**
3. **Enter** the social security number
4. Click **Save**
5. If additional **Identifiers** such as DEA numbers, Employee Numbers, Social work number etc. need to be added click **Add** under the corresponding section of the panel and repeat the above steps.

Tip: As you complete menu items whether in the **Completion Requirements** section or in the **Additional items** sections the items move from the right hand side of your screen under the Completion Module to the left hand side under **Profile**. By clicking on the items under profile this can be used as a navigation menu to view completed items in the staff member's profile. As the user clicks on the various panels they are automatically brought to that panel.

If the **Completion Requirements** sections **ONLY** are completed the Staff Members profile will appear as below:

Profile



Duckie, Rubber

Male

Date of Birth: 08/26/1982





Employment Profile

Job Title:	Staff Member Type: Administrator	Employment Type:	Employment Date Range: 08/17/2014 -	
Full Time Equivalent:				
Taxonomy Type:				
Taxonomy Classification:				
Taxonomy Specialization:				

Relationships:				
+ Add				

Contact Information

Preferred Method Of Contact: **Phone** 

	rubber.duckie@hi.org	Primary	 
+ Add			

	Mobile	478-698-5698	Primary	 
+ Add				

	<p>Home</p> <p>1515 Quack Quack Lane Honolulu Hawaii 21356</p> <p>Confidential: Years of stay:</p>	 
+ Add		

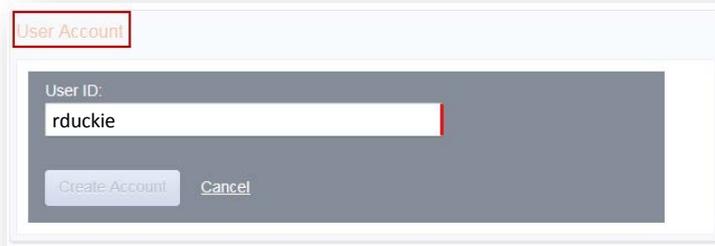
Identifiers

Social Security Number	999-99-9999	-	 
Note:			
+ Add			

Creating Staff Member Accounts

After you have completed all the items in the **Completion Requirements** section, the next step is to set up the staff member with an account in WITS. The following additional items must be completed:

1. **Manage Accounts and Roles:** *This allows you to create a login for your staff member and grant them access to perform various actions.*
 - a. To begin, under the **Additional Items section** click **Manage Accounts and Roles**.
 - b. This will open the **User Account** panel below.



The screenshot shows a modal window titled "User Account". Inside, there is a "User ID:" label followed by a text input field containing "rduckie". Below the input field are two buttons: "Create Account" and "Cancel".

Tip: Once you enter a user ID you cannot edit this field.

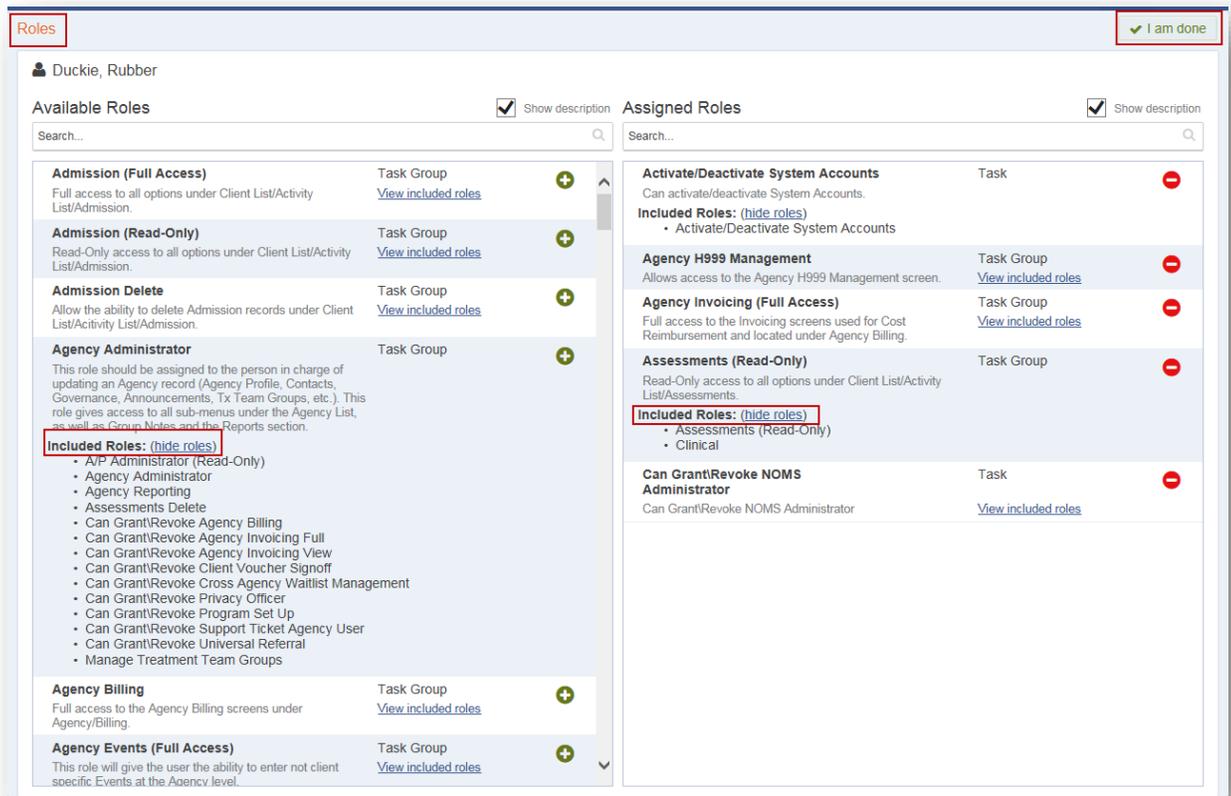
- c. Enter the **User ID** that you would like the staff member to use to log into WITS.
- d. Next, click **Create Account**.
- e. When you click **Create Account** the username is automatically emailed to the staff member. In a separate email the staff member also receives a link which allows them to set their password, pin and security question.
- f. Once you have created the staff member's account, the **User Account** panel now displays a Role section.



The screenshot shows the "User Account" panel after account creation. The "User ID:" field now displays "rduckie". Below it is a "Roles" section with a red arrow pointing to it. To the right of the "Roles" section is a button labeled "Manage roles".

- g. To assign roles to the staff member click **Manage roles**.

Tip: The roles that you are granting the Staff Member here are at the Agency Account level.



h. The **Roles** screen below appears.

i. Users can:

- i. Search for available roles by typing in the available roles search box which will filter the results as the user types
- ii. View included roles in each role

Note: Reset Logon role: gives users the ability to perform operations on Agency Accounts. This role includes (has been granted) the following permissions:

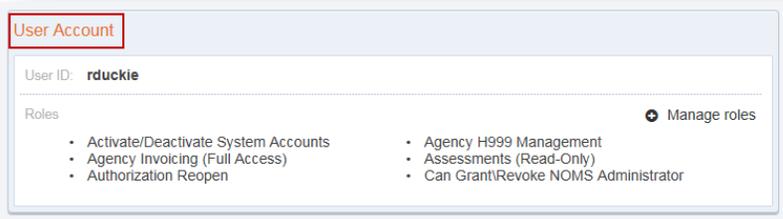
- i. Activate/Deactivate System Accounts
- ii. Lock/Unlock System Accounts
- iii. Reset Credentials System Accounts
- iv. End IP System Session
- v. Lock/Unlock Agency Accounts

These permissions/actions are explained more fully in the Administrative Actions section of this document.

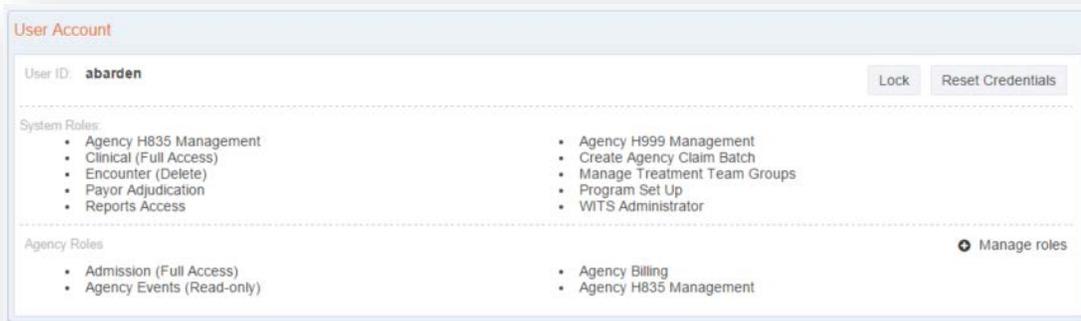
iii. View the role description

j. To select a role click on the associated **plus sign**. This will automatically move the selected role from the **Available Roles** to the **Assigned Roles** box.

- k. To delete a role chosen by mistake, click the associated **minus sign**. This will automatically move the selected role from the **Assigned Roles** to the **Available Roles** box.
- l. When all roles have been assigned for this user click **I am done**. All chosen roles are now shown in the **User Account** panel.



NOTE: If the staff member later has any cross agency roles assigned by the WITS administrator, the Agency Administrator will be able to view those in the Staff Member profile as shown in the screenshot below. The Agency Administrator cannot edit or add cross-agency roles.



2. **Facility Assignment:** *Allows you to assign the Staff Member access to a facility.*
 - a. To begin, under the **Additional Items** section click **Add Facility Assignment**.
 - b. The **Facility Assignments** screen appears.

The screenshot shows the 'Facility Assignments' interface. At the top, the title 'Facility Assignments' is enclosed in a red rectangular box. Below the title, there are two search bars under the heading 'Facilities:'. The left search bar contains the text 'hrtyty' and lists 'Rampart' and 'Testing Unit' below it. The right search bar contains the text 'Administrative Unit' and has a small 'x' icon to its right. Below these search bars is an 'Effective:' section with a date input field showing 'June 2015' and a calendar icon. To the right of the date field is a checkbox labeled 'Has end date' which is checked. Below the date field is a calendar grid for June 2015, with the 4th of the month highlighted. At the bottom of the form are three buttons: 'Today' (blue), 'Clear' (red), and 'Done' (green).

Tip: Select one facility at a time and enter the effective start and end dates if applicable. This will allow you to grant user access to that facility for a specified period of time.

- c. Select the **Facility** that you would like the staff member to have access to.
- d. Select the **Effective** or beginning date of access. If applicable, select the end date you would like the access to end, otherwise, uncheck the **Has end date** box.
- e. Click **Save**.

Adding additional items to a profile

The remaining items under the **Additional items** section allow the user to customize the staff member's profile with relevant data. It is important to note that some of the panels such as access category, and the treatment domain panel below are exposed and used in some WITS instances, exposed but not used in others and NOT shown in some instances. Please only complete panels which you normally complete in WITS Prime or find useful.

Additional items
> Define Employment Profile
> Manage Accounts and Roles
> Add Facility Assignment
> Add Access Category
> Add Professional Qualification
> Add Email
> Add Phone Number
> Add Address
> Add Identifier
> Add Language
> Add Checklist Item
> Add Relationship
> Add Training
> Add Note
> Add Treatment Domain

Professional Qualifications: This panel allows us to denote a degree, certification, or license held by the staff member. In addition you can record the issuing institution and the effective dates.

- a. To begin, under the **Additional Items section** click **Add Professional Qualifications**.
- b. The **Professional Qualifications** panel appears below.

Tip: After completing the **Professional Qualifications** panel if you click **Include in Display Name**, the **Profile** panel now shows the user's credentials next to their name.

Professional Qualifications

Category: License

Type: Licensed Clinical Psychologist

Issuer Name: John's Hopkins University

Include in Display Name

Effective: [Date] - [Date] Has end date

Save Cancel

- c. Select the **Category** the degree falls into:
 - i. Certification
 - ii. Degree
 - iii. License
- d. Select the **Type**: Filters based on the category chosen.
- e. Complete the **Issuer's Name** field.
- f. Enter the **Effective Dates** if applicable.
- g. Click **Save**.

Language: Being able to communicate in more than one language can be essential in the treatment process if a client does not speak English. The Languages panel allows you to document the various languages that a staff member speaks and the proficiency by using a Likert Scale. The Likert Scale allows you to quickly view the expertise of a staff member’s reading, speaking and writing by looking at the multi-colored scales.

- a. To begin, under the **Additional items section** click the **Add Language**.
- b. The Languages panel appears.



- c. Select the language that the staff member speaks.
- d. Next, hover over the various scales. Each rectangle indicates the corresponding proficiency level. Choose the appropriate level for each of the scales.
- e. Click **Save**.
6. To add additional languages click **Add** under the corresponding section of the panel and repeat the above steps.

Checklist Item: The Checklist panel allows you to create a checklist of items which have been completed or are in the process of being completed for the staff member such as a background check and performance review.

Note: In WITS Prime Check List items were displayed on the Staff Profile screen. Some instances had its turned on and other had it turned off. These seven items below have either become Check List items or a Check List Item Follow Up Question.

- ✓ Dev. Plan Date
- ✓ Last TB Test Date
- ✓ Performance Review Date
- ✓ Policies and Procedures Manual Received
- ✓ Required Background Checks Completed
- ✓ Background Check Outcomes Acceptable
- ✓ Last Performance Appraisal Process Participation

- a. To begin creating a Check list, under the **Additional Items section** click the **Add Checklist Item**.
- b. The **Checklist** pannel appears.

- c. Select the correct category:
 - i. On Boarding
 - ii. Periodic
 - iii. Separation

- b. Select the corresponding **Type**.



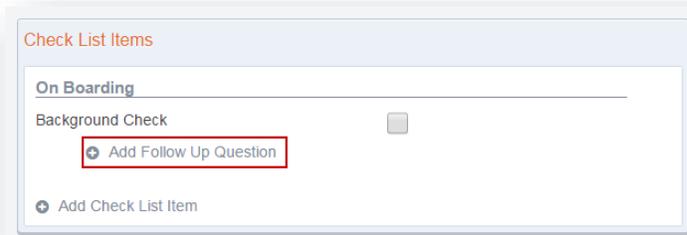
Check List Items

Category:
On Boarding

Type:
Background Check

Save Cancel

- d. Then click save. The screen will appear as below.



Check List Items

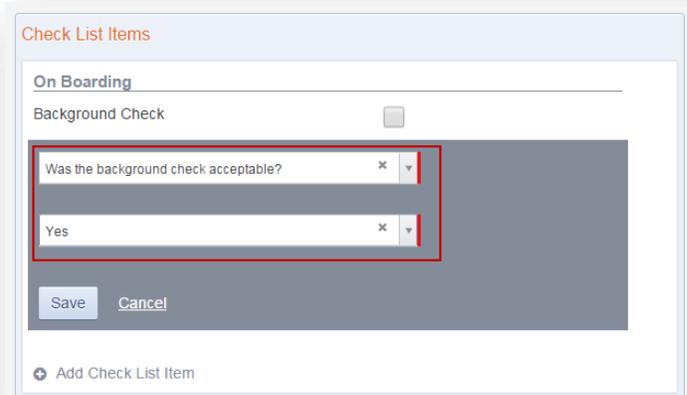
On Boarding

Background Check

+ Add Follow Up Question

+ Add Check List Item

- e. Next, click **Add a Follow Up Question**.
- f. Select the corresponding question and answer and click **Save**.



Check List Items

On Boarding

Background Check

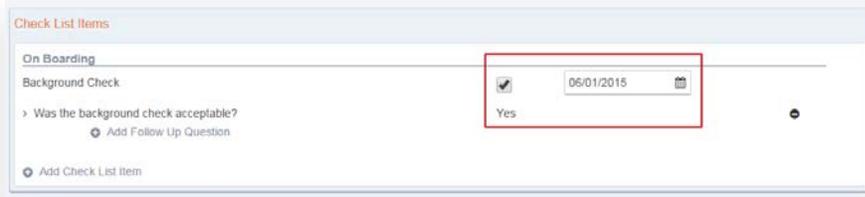
Was the background check acceptable?

Yes

Save Cancel

+ Add Check List Item

- g. Check the check box to show the checklist item has been completed and enter the completed date.



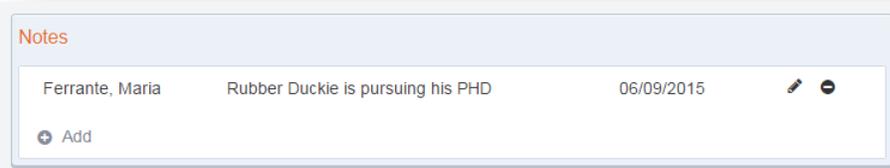
- h. To add additional checklist items click **Add** under the corresponding section of the panel and repeat the above steps.

Notes: The Notes panel allows you to document anything you feel necessary in regards to this staff member. As you type the box automatically expands which allows the user to easily view what is being typed. In addition, the user also has the ability to enlarge the text box by pulling the tab in the lower right hand corner of the box.

- a. To begin, under the **Additional items section** click the **Add Note**.
- b. The **Notes** panel below appears.



- c. Enter your note.
- d. Click **Save**.

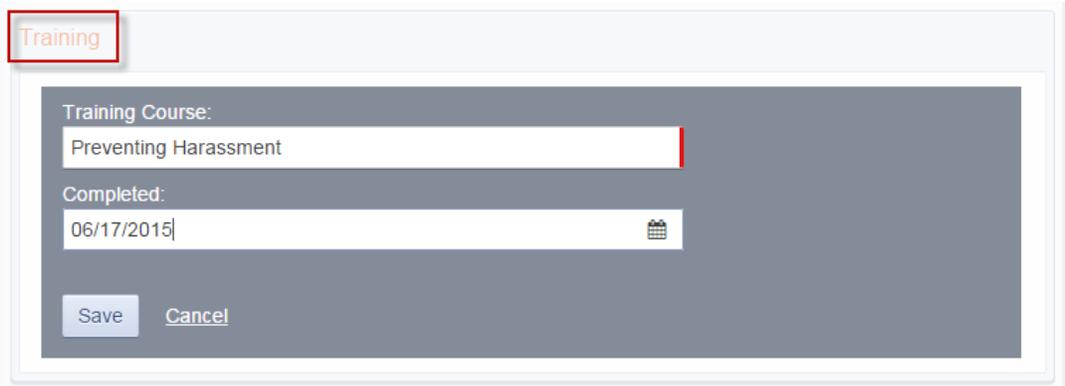


- e. To add additional **Notes** click **Add** under the corresponding section of the panel and repeat the above steps.

Tip: When your note is saved WITS automatically enters a date stamp on the panel.

Training: The training panel allows you to enter any trainings that the staff member has completed and the date of completion.

- a. To begin, under the **Additional Items section** click the **Add Training**.
- b. The **Training** panel below appears.
- c. Enter the training course that the staff member completed.
- d. Enter the date the course was completed.
- e. Click **Save**.
- f. To add additional **Trainings** click **Add** under the corresponding section of the panel and repeat the above steps.



The screenshot shows a modal window titled "Training". It features a dark grey background with white text and input fields. The "Training Course:" field contains "Preventing Harassment". The "Completed:" field contains "06/17/2015" and includes a calendar icon. At the bottom, there are "Save" and "Cancel" buttons.

Treatment Domains: If enabled in your instance complete the Treatment Domains panel.

- a. To begin, under the **Additional items section** click the **Add Treatment Domain**.
- b. The **Treatment Domain** panel opens.



The screenshot shows a modal window titled "Treatment Domains". It features a dark grey background with white text and a dropdown menu. The dropdown menu is open, showing "Substance Abuse" as the selected option. Below the dropdown, there are "Save" and "Cancel" buttons.

- c. Select the correct domain.
- d. Click **Save**.
- e. If additional **Treatment Domains** need to be added click **Add** under the corresponding section of the panel and repeat the above steps.

Access Category: If enabled in your instance complete the **Access Category** panel.

- a. To begin, under the **Additional Items** section click the **Add Access Categories**.
- b. The **Access Category** pannel below appears.



The image shows a dialog box titled "Access Categories". It contains a dropdown menu with the text "Select" and a small downward arrow on the right. Below the dropdown are two buttons: "Save" and "Cancel". The dialog box has a light blue header and a white body with a grey background for the content area.

- c. Select the correct **Access Category**.
- d. Click **Save**.
- e. If additional **Access Categories** need to be added click **Add** under the corresponding section of the panel and repeat the above steps.

Completed Staff Member Profile

If all fields both required and optional are completed your Staff Member Profile will appear as below.

17:21
WITS HI-WITS QA
Diagnosis ☰ Logout

User: Ferrante, Maria | Location: Administrative Agency, Administrative Unit
Snapshot

Back to Search
DONE EDITING

Profile >

- Employment Profile
- User Account
- Facility Assignments
- Professional Qualifications
- Contact Information
- Identifiers
- Check List Items
- Languages
- Training
- Notes
- Treatment Domains

Profile

Duckie, Rubber, LCP

Male

Date of Birth: 08/25/1962

Employment Profile

Job Title	Staff Member Type	Employment Type	Employment Date Range
Full Time Equivalent: Taxonomy Type: Taxonomy Classification: Taxonomy Specialization:	Administrator		08/17/2014 -

Relationships

Relationship to this Staff Member	Related Staff Member
Manager	Davidson, Harley

[Add](#)

User Account

User ID: **rudckie**

Roles

- Admission (Full Access)
- Assessments (Full Access)
- Edit Staff Members
- Agency Administrator
- Can Grant/Revoke Cross Agency Waitlist Management

Facility Assignments

Administrative Unit	Program Assignments
Administrative Unit	06/01/2015

Professional Qualifications

License	Degree	University
Licensed Clinical Psychologist	Bachelor of Science	John's Hopkins University
	Master's Degree	NYU
		Loyola

Contact Information

Preferred Method Of Contact: Phone

✉ rubber.duckie@hi.org	Primary
📞 Mobile 478-698-5696	Primary

📍 Home
1015 Quack Quack Lane
Honolulu Hawaii 21356
Confidential
Years of stay:

Identifiers

Social Security Number	999-99-9999
Medicaid Identifier	5866967441

Check List Items

On Boarding		
Background Check	<input checked="" type="checkbox"/>	05/31/2015
} Was the background check acceptable? Yes		
Periodic		
Performance Review	<input checked="" type="checkbox"/>	06/24/2015
} Did the staff member participate in the performance review? Yes		

Languages

Italian	Reading: Very Proficient	Speaking: Extremely Proficient	Writing: Very Proficient
Spanish, Castilian	Reading: Moderately Proficient	Speaking: Moderately Proficient	Writing: Slightly Proficient

Training

Preventing Harassment	06/17/2015
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Notes

Ferrante, Maria	Rubber Duckie is pursuing his PhD	06/09/2015
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Treatment Domains

Substance Abuse

Additional Items

- Define Employment Profile
- Manage Accounts and Roles
- Add Facility Assignment
- Add Access Category
- Add Professional Qualification
- Add Email
- Add Phone Number
- Add Address
- Add Identifier
- Add Language
- Add Checklist Item
- Add Relationship
- Add Training
- Add Note
- Add Treatment Domain

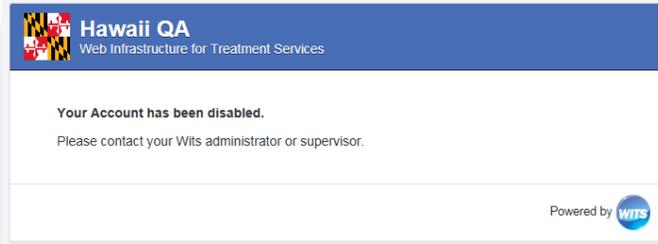
Staff Member Administrative Actions

Agency Administrators, or others who have roles which have given them permission to access the Actions on the staff member list, may perform the following actions when managing staff accounts. Step by step directions for performing these actions are shown below at the Agency Account Level, however, these actions below can be performed at both the System and Agency Account level.

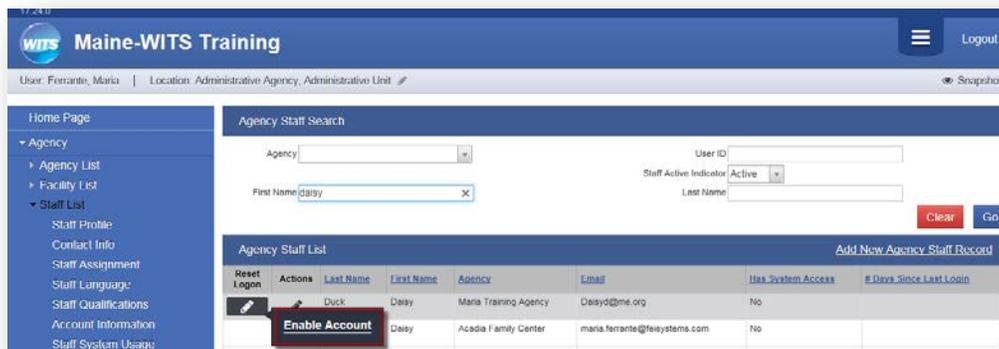
- Enabling A Staff Member's Account
 - When a Staff Member has tried to log into WITS unsuccessfully three times, they will have disabled their account.
 - The **enable** button will no longer appear under the actions column on the Staff Member List screen, as searching for enabled/disabled accounts would cause performance issues in the staff member search. The button is now on the Staff Member's Profile.
- Ending an IP Session
 - "Has IP Session" is equivalent to the "Release Lock" in WITS Prime.
 - This action will be used when a user forgets to log off before closing a browser on one PC, and then tries to login from another with a different IP.
- Lock/Unlock
 - Locking an account is the same as "Disable Account" or "Remove Account" in WITS Prime.
 - Locking a user is the administrator's way of intentionally preventing that user from accessing the system.
 - A reason must be entered when locking an account.
- Reset Credentials
 - As in WITS Prime, Reset Credentials allows the administrator to reset the password for the user.

Enabling a Staff Member's Account

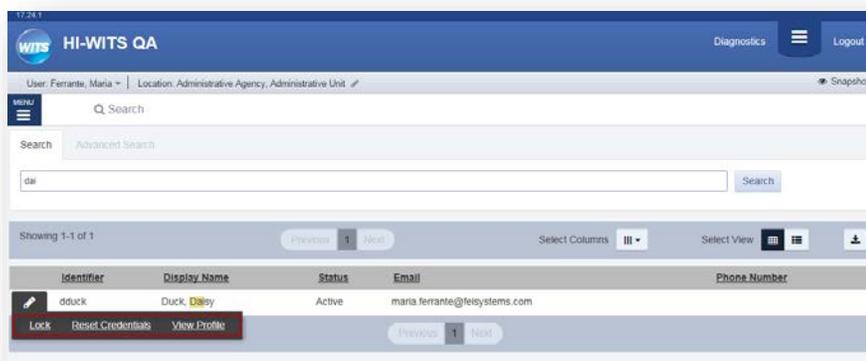
When a Staff Member has tried to log into WITS unsuccessfully three times, they will have disabled their account and will receive the notification screen below.



- In WITS Prime a user could re-enable a Staff Member's account on the Agency Staff List screen.



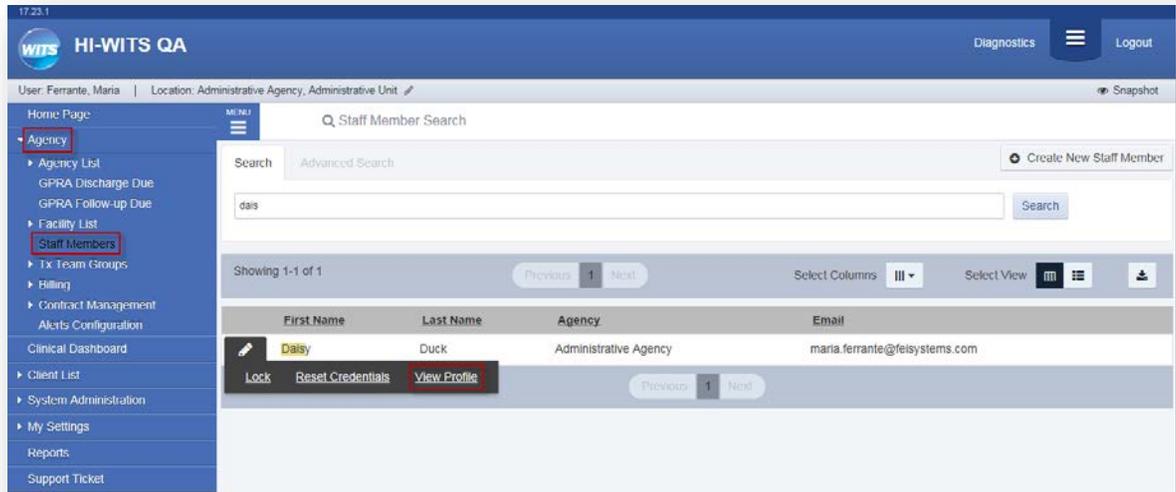
- In WITS EA a Staff Member's account can be *re-enabled at the System Account Level, or Agency Account Level*. You will now need to review the Staff Member's profile to re-enable their account in WITS.
- The enable button will no longer appear under the actions button on the Agency Staff List screen.



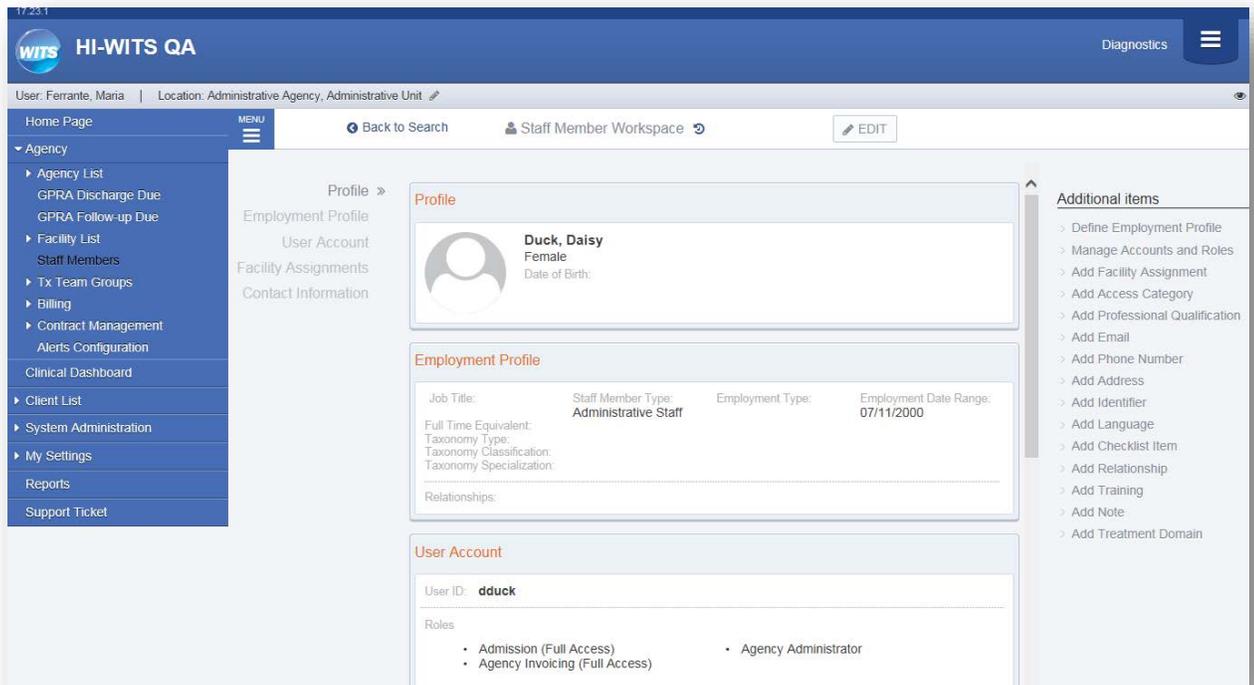
To enable a Staff Member's account perform the following steps:

1. In the left hand navigation panel click **Agency** followed by **Staff Member**.
2. Search for the Staff Member, then hover over the pencil icon and click **View Profile**.

Tip: When hovering over the pencil icon the user can also Lock a Staff Member out of WITS and Reset their Credentials from this screen as well.

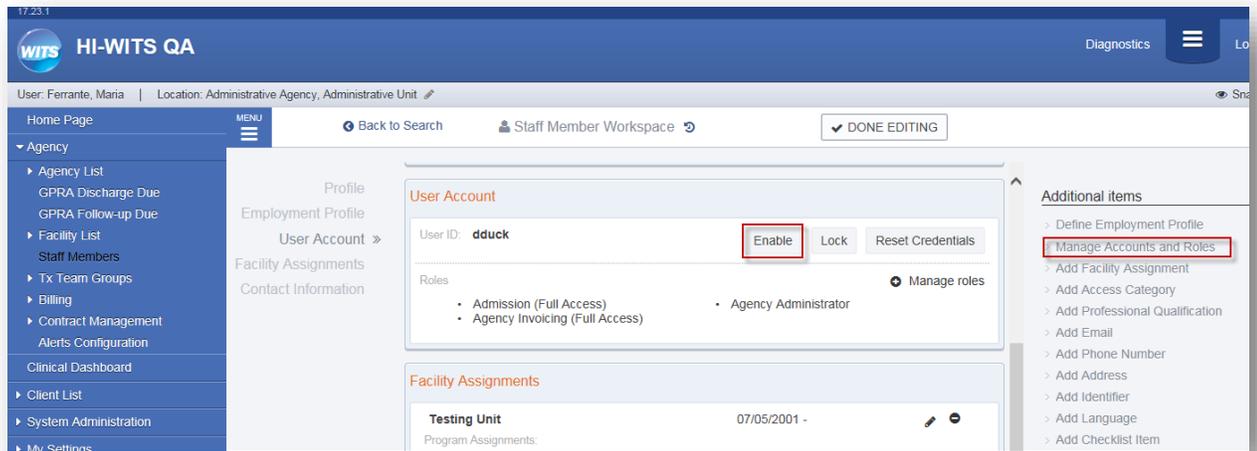


3. The Staff Member's profile screen now opens.

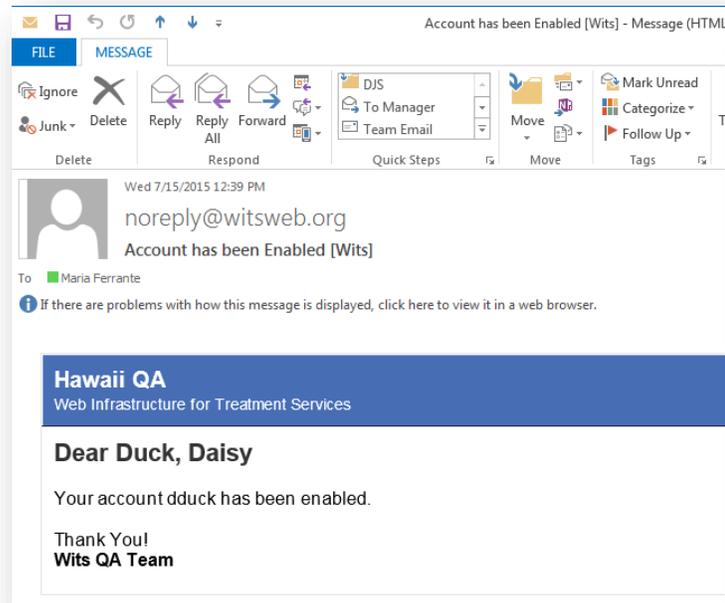


4. Under the **Additional Items** menu to the right of the screen click **Manage Accounts and Roles**. This brings the User Account panel to the top of the page and makes it editable.

Tip: Users can also Lock a Staff Member out of WITS and Reset their Credentials from this screen as well.



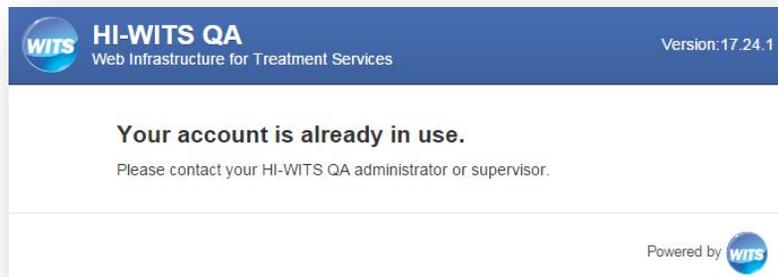
5. To re-enable a Staff Member's account click **Enable**.
6. Next, click **Done Editing**.
7. The Staff Member whose account was enabled will receive an email from noreply@witsweb.org letting them know that their account has been re-enabled.



End IP Session

A Staff Member who forgets to log out of their WITS session before leaving work, may wish to log on from a different location.

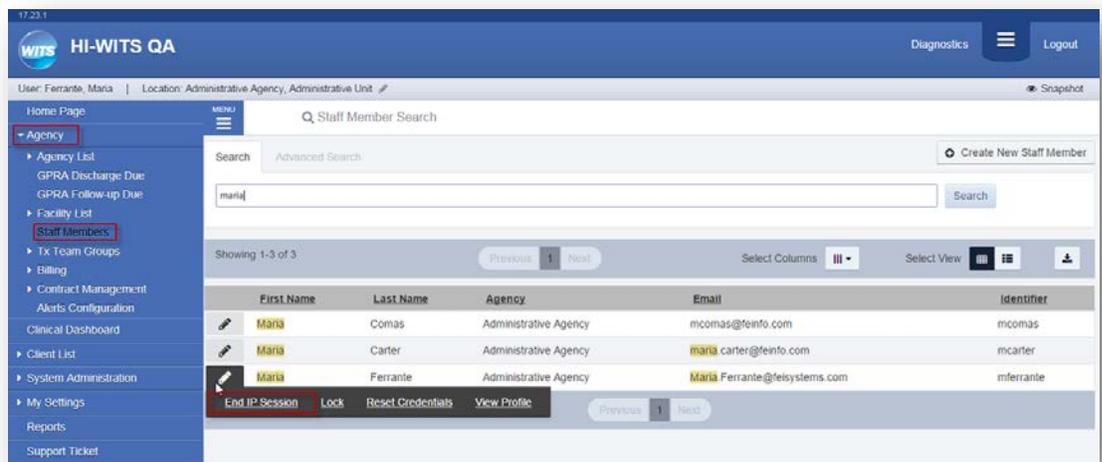
When that Staff Member tries to log into WITS from another IP address, WITS will stop them and display the message below.



To clear an active System Account session so that the Staff Member can sign in from a different IP Address, perform the following steps. (NOTE: This used to be called Lock/Unlock in WITS Prime)

1. To begin, in the left navigation panel click on **Agency** followed by **Staff Members**. This brings you to the **Staff Member Search** screen.
2. Next, in the search bar search for the desired staff member.
3. Hover over the pencil icon and click **End IP Session**.

Note: End IP Session may also be accessed from the Staff Member's Profile screen.



4. The staff member should now be able to log into WITS from any computer.

Lock/Unlock

Administrators have the ability to lock Staff Members out of WITS intentionally so that they cannot sign into WITS. This functionality is used if a staff member left the organization, took an extended leave of absence, or needed to be temporarily locked out of WITS for some other reason. This can be done at both the System Account and Agency Account Level.

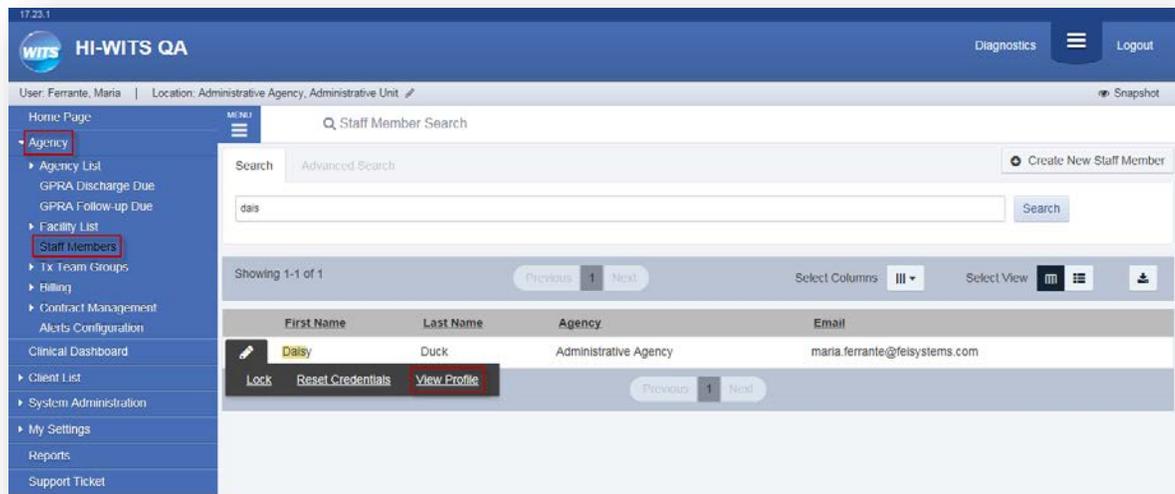
Currently it does not matter at which level you lock out the Staff Member as at either level they will not be able to log into WITS. If you have locked out a Staff Member at the System Account Level, they must be unlocked at the System Account Level. If a Staff Member is locked at the Agency Account Level a user can unlock their account at either the Agency Account Level or at the System Account Level on the Agency Accounts panel. Note: This distinction is important as it paves the way for new functionality in the future.

In WITS Prime this functionality was available on the Staff Member's Account information page under Administrative Actions by clicking **Disable Account** or **Remove Account**.

To lock a Staff Member's account perform the following steps:

1. In the left hand navigation panel click **Agency** followed by **Staff Member**.
2. Search for the Staff Member, hover over the pencil icon and click **Lock**.

Tip: The Lock feature can also be accessed from the user's Member Profile screen.

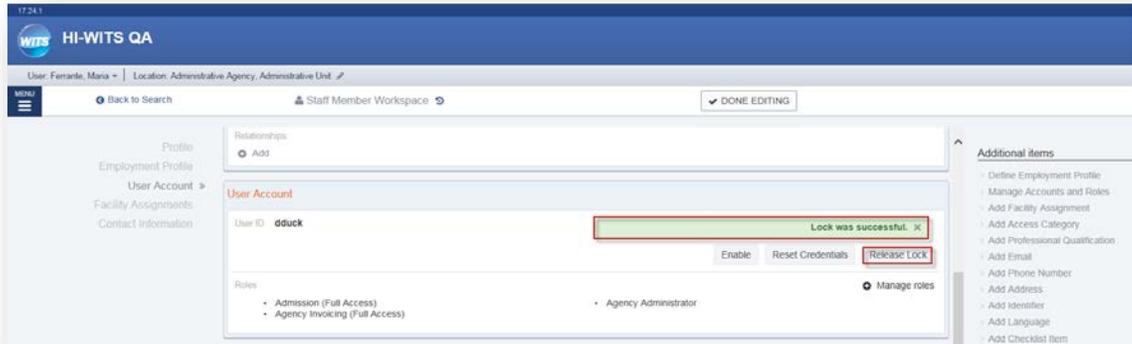


3. The Lock screen below will appear.

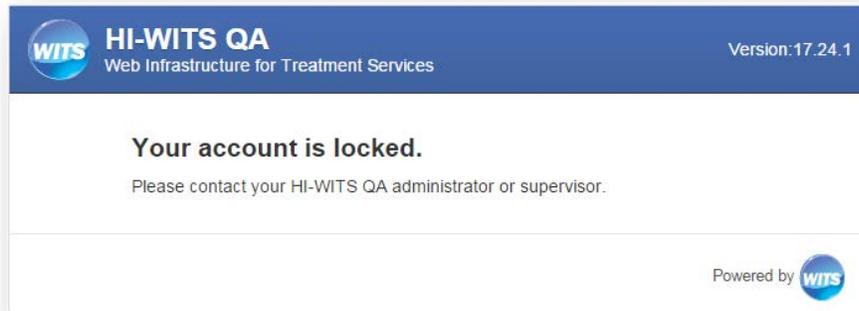


4. Enter the reason that you are locking this Staff Member's account and click **Lock**.

5. Upon locking the Staff Member's account at the Agency Account Level you will see:



6. The Staff Member is now locked out of WITS and cannot log in.
7. If they try to log in, they will receive the following screen.



8. Release Lock can be performed from the Staff Member List (see step 2), by clicking **Release Lock**.
9. The Release Lock panel will appear and inform the user of the reason the account is locked and who locked it.



10. To unlock the account click **Release lock**.
11. The Staff Member now has regained the ability to log into WITS.

Reset Credentials

Reset Credentials allows the administrator to reset the password for the user.

To Reset a Staff Member's credentials perform the following steps:

1. In the left hand navigation panel click **Agency** followed by **Staff Member**.
2. Search for the Staff Member, hover over the pencil icon and click **Reset Credentials**.

The screenshot shows the WITS HI-WITS QA interface. At the top, there is a header with the WITS logo, 'HI-WITS QA', and navigation links for 'Diagnostics' and 'Logout'. Below the header, the user information is displayed: 'User: Ferrante, Maria' and 'Location: Administrative Agency, Administrative Unit'. A search bar is present with the text 'Staff Member Search'. Below the search bar, there is a table of staff members. The table has columns for 'First Name', 'Last Name', 'Agency', 'Email', and 'Identifier'. The row for 'Bill Bassler' is highlighted, and the 'Reset Credentials' button is visible and highlighted in red. Other buttons like 'Lock' and 'View Profile' are also visible for this user.

	First Name	Last Name	Agency	Email	Identifier
	test	vlea	Administrative Agency	amber.albro@feisystems.com	tvlea
	StaffAdmin	Access	Administrative Agency	rkinney@feinfo.com	staffadmin
	Bill	Bassler	Administrative Agency	Bill.Bassler@feisystems.com	BBassler
	Run	Fan	Administrative Agency	Run.Fan@feisystems.com	rfan

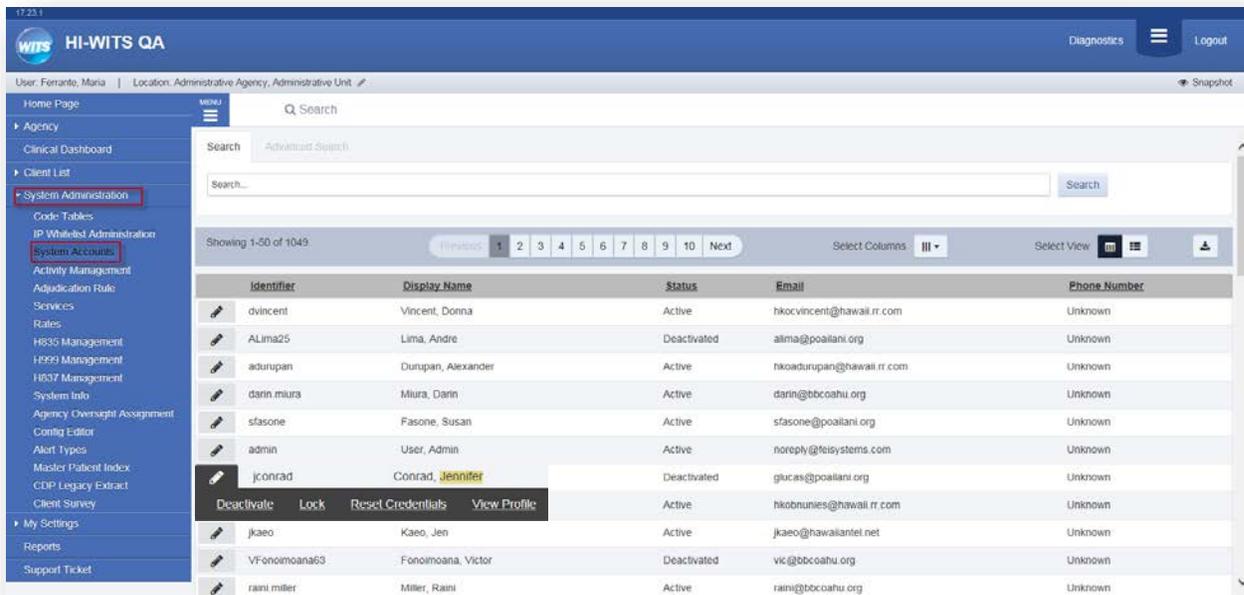
3. The Staff Member will receive an email with instructions to reset their credentials.

System Accounts

Accessing a System Account

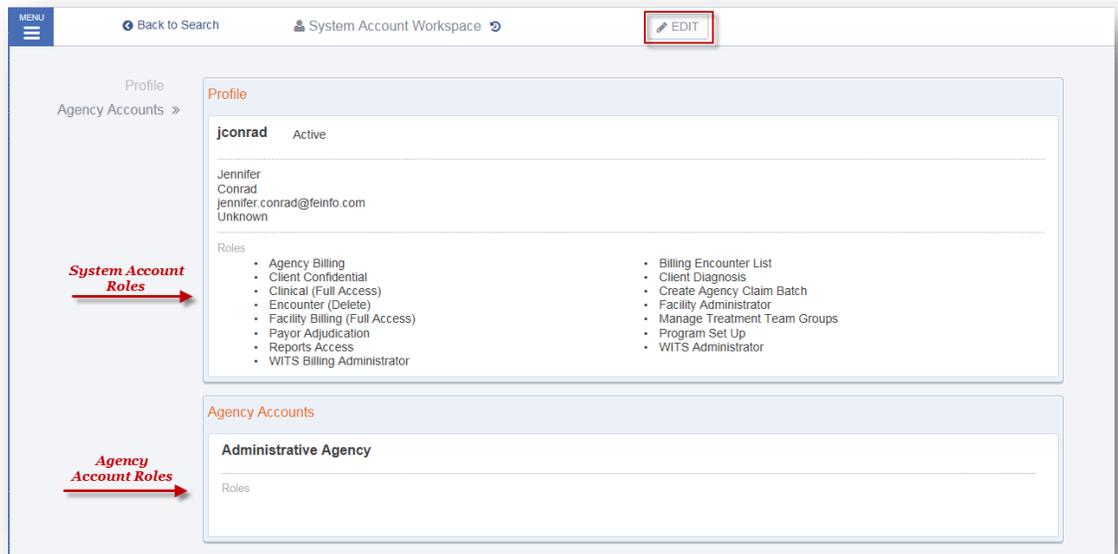
To access a Staff Member's System Account:

1. From the home page click **System Administration**
2. Then click **System Accounts**
3. You are now taken to the **System Account Search Screen**



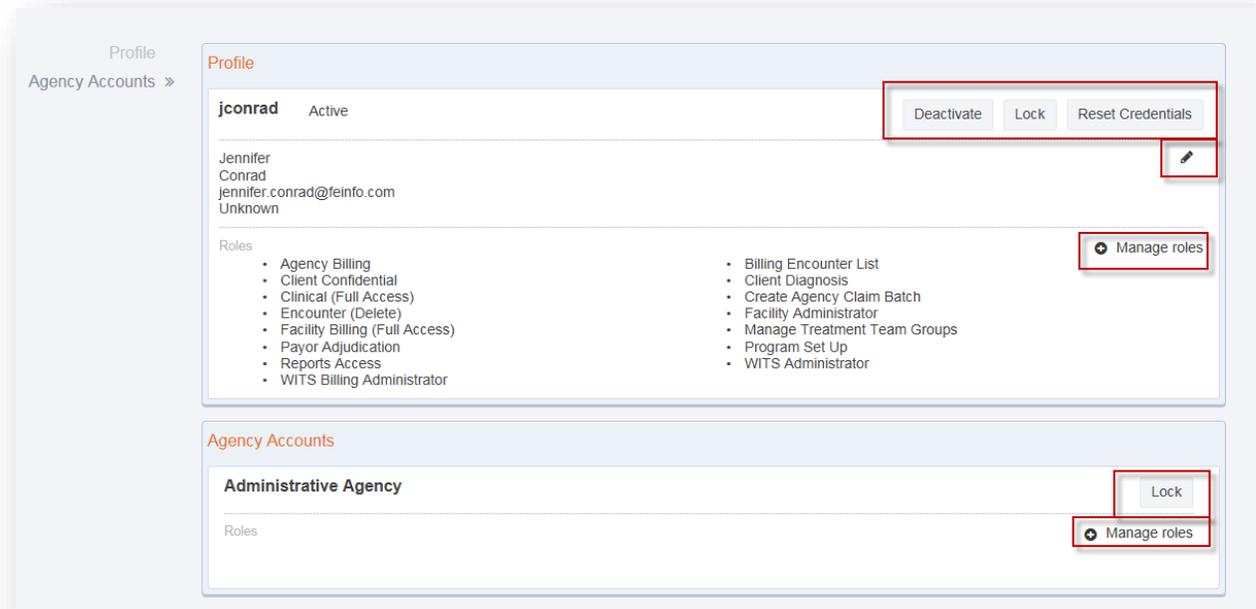
4. This screen allow the user to:
 - a. Search for a staff member across all agencies (if the staff member has a login account)
 - b. Disable a Staff Member's System Account
 - c. Lock a Staff Member's System Account
 - d. Reset a Staff Member's Credentials
 - e. View a Staff Member's Profile
 - f. Download a list of all System Accounts in excel
 - g. View the Staff Member's Identifier which is the WITS username
5. After choosing the Staff Member, hover over the **Staff Member's Account** and click **View Profile**
6. This opens the **Staff Member's System Account** below.

Note: A System Account represents the Staff Member's login to the system. In the past a Staff Member's record had a login ID, now a Staff Member's System Account has an identifier which is the Staff Member's username. Previously in prime the Staff Member's login ID was on the account information page of the staff profile.

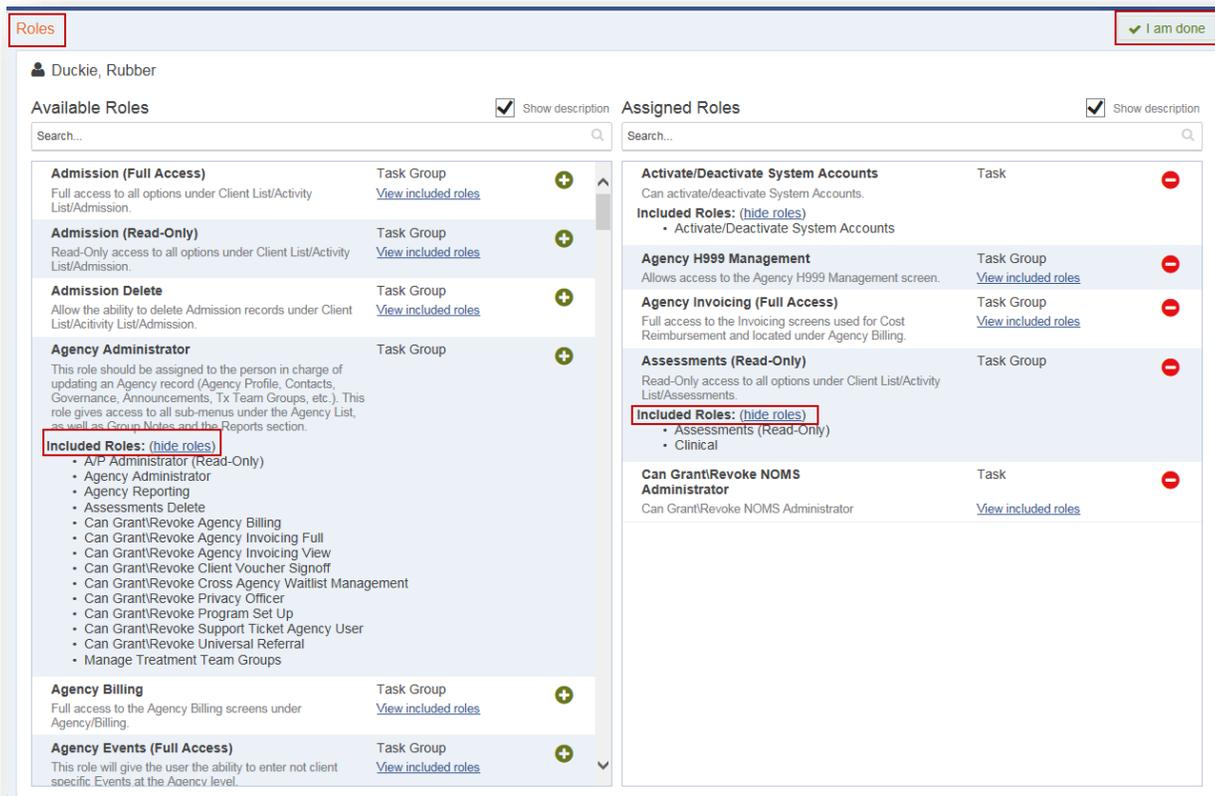


- a. The screen shot above shows WITS Administrator’s System Account. Most WITS Administrators or System Administrators will not have any roles under their Agency Account. It is okay if they do, but is not necessary.
- b. Notice that this user’s System Account above only has roles at the System Account level on the Profile panel. Those roles determine her access at a System Account level.
 - i. When this user enters any Agency, she maintains those System roles.
 - ii. If she also had roles assigned at the agency level, she would inherit those permissions while in the context of that agency.
- c. A Staff Member such as a counselor would only have roles in the Agency Accounts panel. These roles would be given to Staff Members when you are creating their Staff Member Profile. The Agency Account Roles can be managed through the Staff Member’s Staff Profile in the Agency and in the System Administration panel above as they will automatically update each other.
- d. All users will still have a single System Account, single Agency Account and single Staff Member record.

7. To make any changes to the users **System Account** click **EDIT** at the top of the screen.
8. Administrative actions such as Manage Roles will appear at the right hand of the panels



9. To add roles either to the **Staff Member's System Account** or to the **Agency Account** click on **Manage Roles** under the corresponding panel.



10. The **Roles** screen below appears.

- a. Users can:
 - i. Search for available roles by typing in the available roles search box which will filter the results as the user types
 - ii. View included roles in each role
 - iii. View the role description
- b. To select a role click on the associated **plus sign**. This will automatically move the selected role from the **Available Roles** to the **Assigned Roles** box.
- c. To delete a role chosen by mistake, click the associated **minus sign**. This will automatically move the selected role from the **Assigned Roles** to the **Available Roles** box.

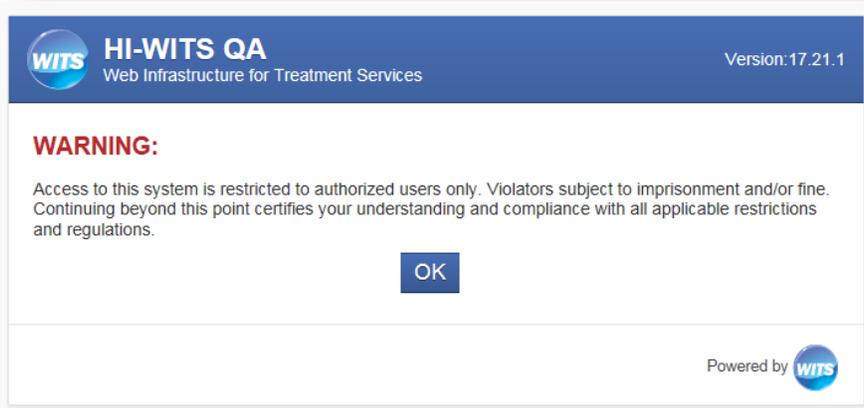
11. When all roles have been assigned for this user click **I am done**. All chosen roles are now shown under the corresponding panel and the user is taken back to the Staff Member's System Accounts page.

Tip: To view the last time a Staff Member logged in, view their profile in the system account and click on the history button next to System Account Workspace. A list of all business operations performed on that system account are shown such as Activating and Deactivating an Account, End System Session, Grant System Role, Lock account, Revise Contact Information, Revised Session Expiration, Revoke System Role, Start System Session and Unlock.

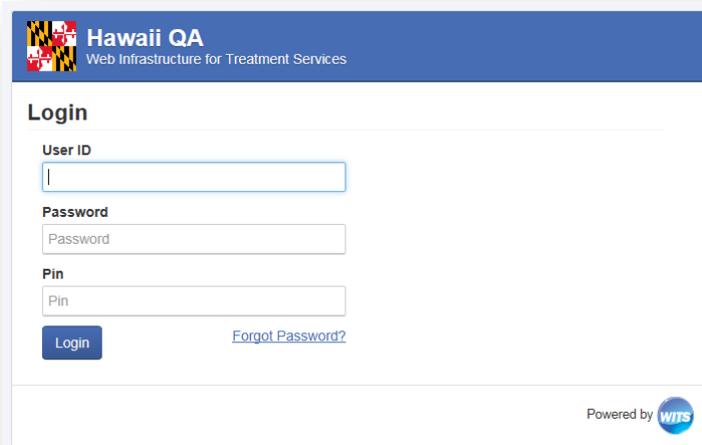
Logging into WITS

The process of logging into WITS has changed as now the User ID, Password and Pin are all on the same page.

1. To login, open your browser then enter the **URL** of your **WITS** system.

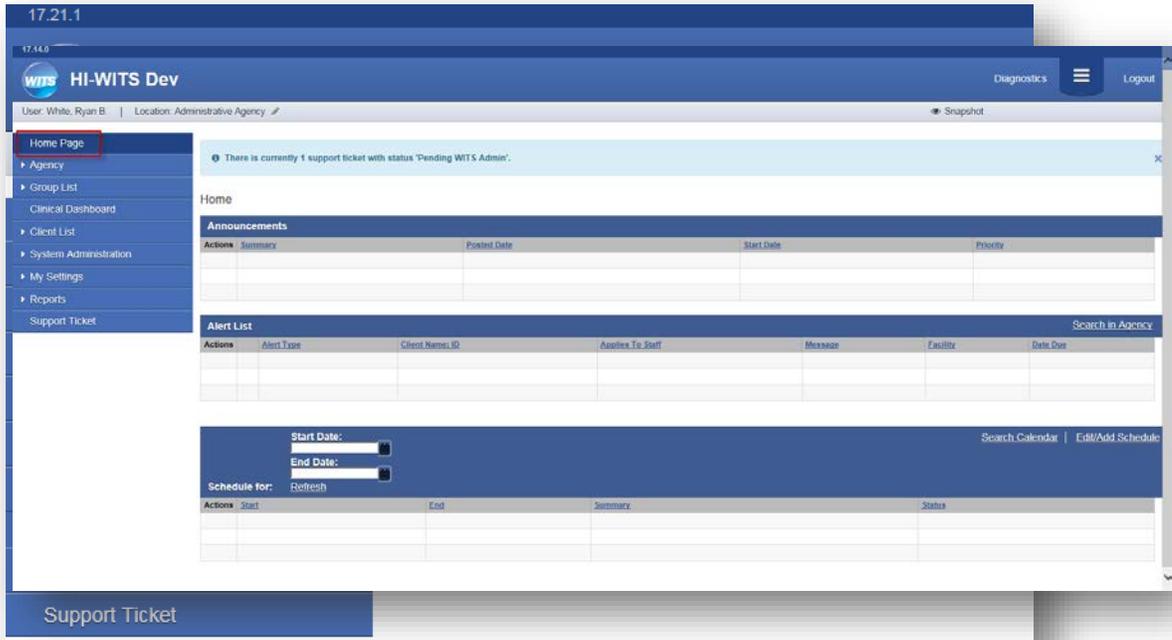


2. Type in your **User ID**, **Password** and **PIN** then click **Login**.



Tip: Any user who has not previously answered their security question will be prompted to answer it as soon as they log into 18.0 for the first time.

3. If asked, choose your Agency and Facility and click **Go**.



4. You will then be taken to your homepage.

System Settings

In order to allow more intuitive access in EA the **My Settings** menu item on the left hand navigation menu is being removed. The functionality will now be accessible in other places in the WITS system.

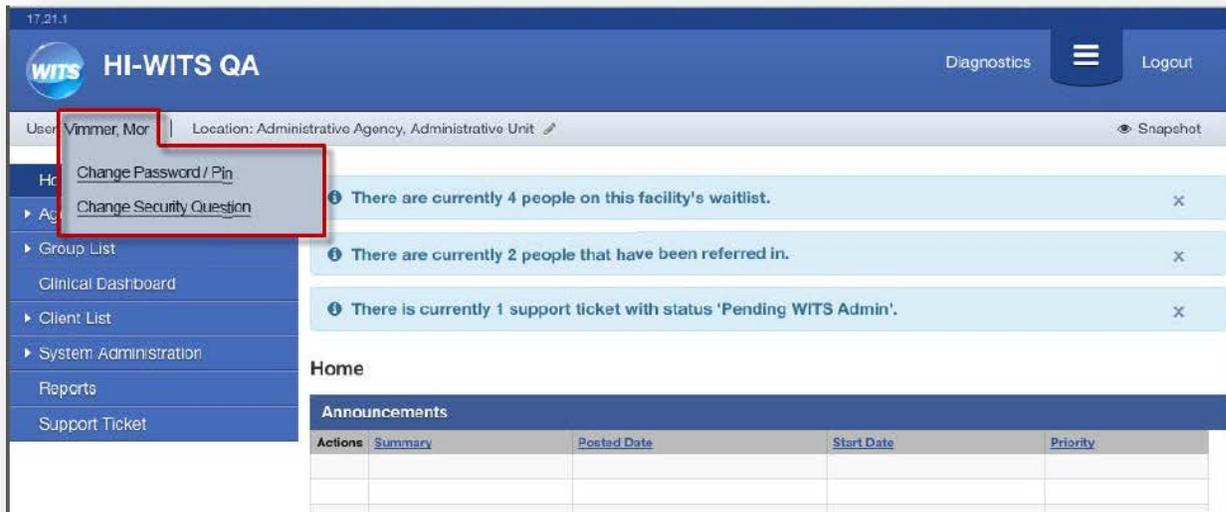
Currently the **My Settings** menu items allows the user to **Change Facilities, to Change Password/Pin**



and to Change Security Question.

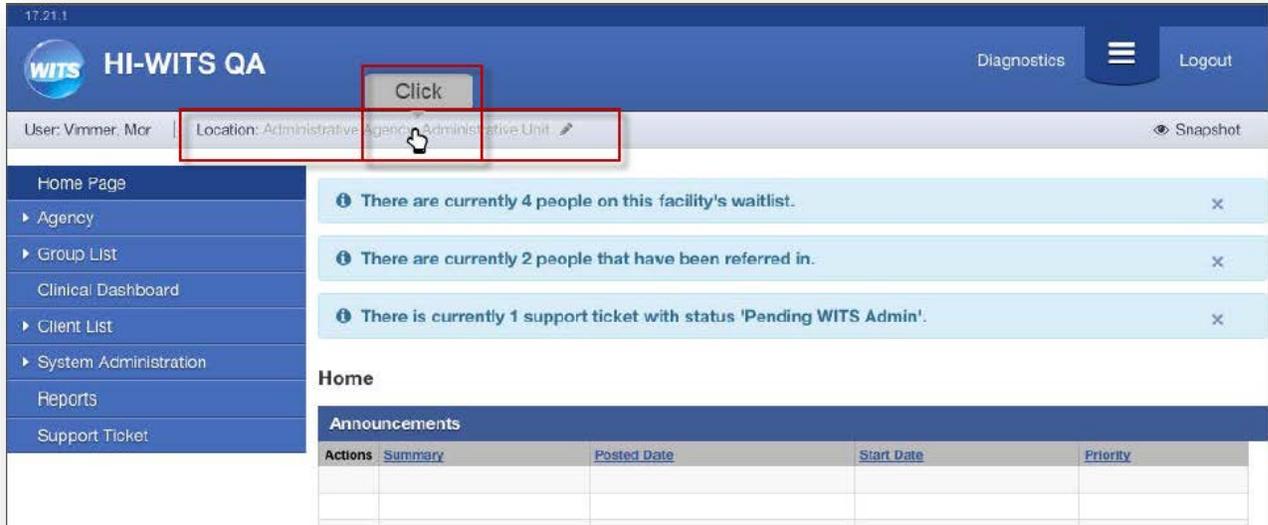
Password/Pin and Security Question

Users can now **Change Password/Pin and Change Security Question** by hovering over the user's Name which is displayed in the top left hand corner of the screen.

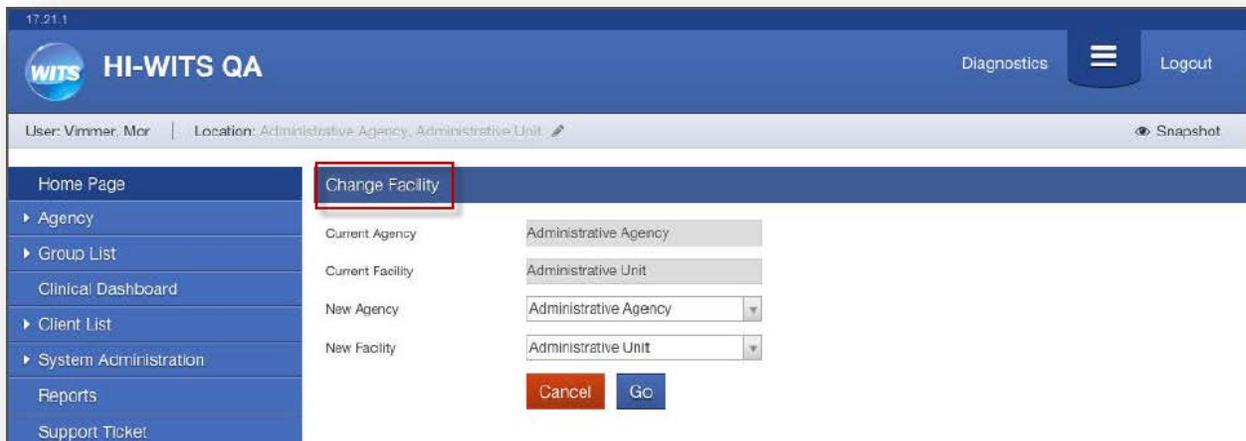


Changing Facilities

If users have access to more than once agency, facility or both they will be able to change facilities by clicking the **Location** in the top left hand corner of the screen.



Once the user clicks on **Location** they can now change their **Agency, Facility or both**.



Logging Out of WITS

The process of logging out of WITS has not changed.

1. To log out of WITS click the log out button in the top right hand corner of your screen.
2. The Logout screen will appear.
3. Click Yes to log out.

