

HI-WITS Training: Setting Up Clinical Dashboard

Lesson 9a

Situation: This Documentation Demonstrates how to Set up Clinical Dashboard

Designate the Clinical Supervisors in WITS

1. **Getting here:** Login, on the Navigation Pane (left menu) select **Agency**, **Staff List**, and **Review the Staff Profile**.
2. Select the Staff Type of Clinical Supervisor.
3. Repeat for all Clinical Supervisors

Note: *The Treatment Team must be set up in order to display records. The clinical staff needs to be set as the Primary Care Member*

17.5.1

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User: Afsharzadeh, Yoseb | Location: Test Provider, Main Office

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- System Usage
- ▶ Billing
- ▶ Contract Management

Staff Profile

First Name **Staff** Middle Last **Manager**

Prof. Credentials Gender **2-Female** DOB

Taxonomy

Category

Sub-Category

Specialty

Email **yoseb.afsharzadeh@doh.hawaii.gov** Staff Type **Clinical Supervisor**

Social Security Clinical Supervisor **Director, Clinical**

National Provider ID Manager Name **Okano, Stephen, MS, MBA**

Title Employment Type

Start Date **7/1/2011** End Date


Dev Plan Date Perf Rev

Last TB Test Date

Policies & Procedures Manual Reviewed? Background Check Outcomes Acceptable?

Required Background Checks Completed? Last Performance Appraisal Process Participation?

staff.manager 10/14/2014 5:40 PM Cancel Save Finish



Assign a Clinical Supervisor to All Clinical Staff in WITS

1. **Getting here:** Login, on the Navigation Pane (left menu) select **Agency**, **Staff List**, and **Review the Staff Profile**.
2. Select the Name of the appropriate Clinical Supervisor.
3. Repeat for all Clinical Staff.

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Primary Staff Set Up for the Clinical Dashboard

1. **Getting here:** Login, on the Navigation Pane (left menu) select **Agency**, **Facility List**, and **Primary Staff Set Up**.
2. Select **Treatment Team Primary Care Member** as the Primary Value.
3. Select **Treatment Team Case Manager** as the Secondary Value
4. Select **Case Assigned To** for the Tertiary Value.

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Logout

Snapshot

Home Page

Agency

- Agency List
- GPRA Discharge Due
- GPRA Followup Due

Facility List

- Facility Profile
- Contacts
- Special Services
- Programs
- Addiction Services
- Operating Hours
- Primary Staff Set Up

Primary Staff Set Up

Primary Value: Treatment Team Primary Care Me...

Secondary Value: Treatment Team Case Manager

Tertiary Value: Case assigned to

Cancel Save Finish