## **HI-WITS Training: Adding Staff & Facility For Driver Education**

Situation: Driver Education will need to Set Up and Manage User Accounts

*Note: Facility will Need to be Created Before Adding Staff (Facility Name = Staff Name)* 

1. Under Agency on the Left Menu pick, Click on the Facility List Link.



2. On the Facility Profile Screen, Add Assessor Name to the Facility Name Field. Facility ID should Increment as you add Facilities (1, 2, 3 etc.)



Contacte

3. Click the Add New Program Record Link

HI-WITS Training Division of Driver Education, Adam Assessor						Afsharzadeh,	Yoseb, BS ▼ Logout	
					· 🖹 SSRS Report	s   👁 Snapshot		
Home Page	Program List			1. Click Add New Program Record Link			Add New Program Record	
✓ Agency	Actions	Program Name	Modality	# Slots	Current Enrolled	Residence	Gender Specific	Term
▶ Agency List								
GPRA Discharge Due								
GPRA Follow-up Due								
Facility Profile								

4. Make Sure to Add "XXXXXX" to the ISATS # field. Under Capacity use Slots

HI-WITS Training	Division of Driver Education, Adam Assessor 🖋		Afsharzadeh, Yoseb, BS ▼ Logout
			🕖 🗟 SSRS Reports 📔 👁 Snapshot
Home Page	Program Setup	1. Driver Education	
✓ Agency	Agency Name Division of Driver Education		
► Agency List	Facility Name Adam Assessor		
GPRA Discharge Due	Program Name Driver Education		
GPRA Follow-up Due	Display Name Driver Educatio		
✓ Facility List	Domain Treatment		3. Driver Education
	Service Code Driver Education		
2. Treatment	Service Code Specifier Driver Education		
	Current Enrolled		
	Program Type Case Mangement		
Addiction Services	Level of care	v	
Operating Hours	Residence		
Primary Staff Set Up	Report to State Yes		
Stall Members	Report to TEDS No		
Rilling			
Contract Management	Available Reporting Guidelines	Selected Reporting Guideli	4. Not Specific
Alerte Configuration		>	
Group List		- K	
	Delay Reporting to TEDS		
Clinical Dashboard	Age Group All Age Groups	5. All Age Grou	Gender Specific Not Specific
<ul> <li>Client List</li> </ul>	Waitlist Availability Type		
<ul> <li>System Administration</li> </ul>	Covered Population v		
	Program Start Date 10/1/2018		8 Click "Go"
6. Start Date	ISATS # XXXXXXXX		
	Require Institutional Claim Codes No *	7. (XXXXXX) for	
		ISATS#	Cancel Save Finish
_			
	Capacity List		Add New Capacity
	Actions Capacity Type C	apacity Start Date	End Dat
	Slots 5	0 11/1/2018	9. Click Add New Cenecity
			LINK

*Note: Add six (6) X's for ISATS#, All Age Groups for Age Group and Not Specific for Gender* 

5. After Clicking Add New Capacity Link, Click Select Slots and set to "50"

HI-WITS Training	Division of Driver Education, Adam Asse	ssor 🖉	7	Afsharzadeh, Yoseb, BS •
18.39.0		1. Slots		<ul> <li>B SSRS Reports            <ul> <li>Snapshot</li> </ul> </li> </ul>
Home Page	Program Capacity Details		<u></u>	
✓ Agency	Capacity Type Slots		2. Capacity = (50)	
▶ Agency List	Daily Capacity 50			
GPRA Discharge Due	Start Date 11/1/18	<b>~</b>		4 Click "Save"
GPRA Follow-up Due	End Date	£		4. Oner Ouve
Facility Profile	Note			
Contacts				
Special Services		1	Cancel	Save Finish
Programs	3. Enter Start Date			

### 6. Click the Staff Members Link from the Left Menu Pick

HI-WITS Training	Divi	ision of Driver Educatior	, Adam Assessor 🖋				Afs	harzadeh, Yoseb, BS ▼
							· 🔒 SSF	≀S Reports   ● Snapshot
Home Page	Prog	gram List						Add New Program Record
✓ Agency	Actions	Program Name	Modality	# Slots	Current Enrolled	Residence	Gender Specific	Term
<ul> <li>Agency List</li> </ul>	<b>A</b>	Driver Education	Driver Education	50	0		Not Specific	10/1/2018 -
GPRA Discharge Due								
GPRA Follow-up Due								
✓ Facility List								
Facility Profile								
Contacts								
Special Services								
Programs								
Addiction Services	1.	Click Staff	Members					
Operating Hours		Link						
Primary Staff Set U								
Ou White a loss of the loss of								

#### 7. Click Create New Staff Member Button

WITS	HI-WITS 18.39.0	Training	Division of Driver Education, Adam Ass	essor 🥒				Afsharzadeh, Yoseb, BS • Logou	, ≡ ut
								SSRS Reports   👁 S	Snapshot
	Q Sta	ff Member Sea	ırch	1. Click C	reate New Staff M	lember			
Search	Advanced S	earch	L					Create New Staff I	Member
Searc	h						Sea	arch	
Showir	ng 1-1 of 1		Previous	a 1 Next		Select Columns	Select Vie	w 🔳 📰	x
	First Name	Last Name	Agency.	Status	Email	Identifier	Start Date	Termination Date	
<b>A</b>	Angela	Smith	Division of Driver Education	Active	angelasmith172@gmail.com	asmith.ouvii	10/01/2018		
					ous 1 Next				

8. Add Staff First Name, Last Name and Gender

Create New Staff Member				×
Prefix:				
First: Adam				
Preferred:				
Middle:			1.	
Last:			Required	
Assessor		$\leftarrow$		
Suffix:				
Gender:				
Male	×			
Create Cancel	2. Click "Cre	ate"		

Note: Make sure to fill in Required Fields

# 9. Follow Completion Requirements

WITS	HI-WITS Training	Division of Driver Education, Adam Assessor 🖌		Afsharzadeh, Yoseb, BS ▼ Logout
MENU	Back to Search	🛔 Staff Member Workspace ව	1. Follow Completion Requirements	B SSRS Reports   ● Snapshot
	Profile » Employment Profile User Account Domains	Profile Assessor, Adam Male Date of Birth: Employment Profile	#1 CC #2 #3	Add Employment Start     Add Employment Start     Add Staff Member Type     Add Staff Member Type     Add Email Address

# 10. Fill Out Employment Profile & Staff Member Type

Employment Profile Job Title: Clinician	_	×	1. Se	t Job Title
Include Job Title in Display Name Staff Member Type: Agency Clinical Staff Employment Type: Parmagant			-	2. Set Type
Employment Date Range: 11/1/18	3. Full Time	× .		
Taxonomy Type: Select Taxonomy Classification: Select Taxonomy Specialization:		× •		4. Not Required
Select Save <u>Cancel</u>		*		

### 11. Add Email Address

Email Address:			
fake.email@fake.com			
Primary		1 Add Email	
Save	2. Click "Save"		

### 12.Click Add Facility Assignment Link

Facilities:	2. Select Specif Facility	fic User	·	Additional items     Define Employment Profile	1. Add
Adam Assessor Andy Assessor Angela Smith Anne Assessor Main	3. Start Date			Manage Accounts and Rely Add Facility Assignment Add Access Category Add Access Category Add Professional Qualification Add Email Add Email Add Email	Facility
Effective:	Has end date	4. Un-check End Date	1		
<ul> <li>No Items</li> <li>Add Phone Number</li> </ul>	5. Click "Save"		_		
No Items     Add Physical Addr					

#### 13. Add Program Assignment

Adam Assessor Program Assignments: Add Program Assignments	1. Add Program	<i></i>
<ul> <li>Add Facility Assignments</li> </ul>		

14. Select Driver Education Program, Set Start Date Un-Check End Date, Set Hours/Week to "40" and Click "Save"

Program Assignments: Program: Driver Education		1. Selec	t Drive	r Education
Effective: 11/1/18  Has end of Hours/Week: 40	date 2 3. Add Start Da	. Un-Chec	ĸ	4. "40"
Save	5. Click "Sa	ve"		

#### 15. Add User Name = First Initial + Last Name.dde



16. Click Enable once, then Click Manage Roles. Add Clinical Diagnosis (Full Access) and Clinical (Full Access) Roles.



#### 17. Move Client Diagnosis and Clinical (Full Access)

icy Roles						✓ 1 am
Assessor, Adam				2. Click I am Done		
ailable Roles	Hide Inherited Roles	Show description	Assigned Roles			Show descrip
earch			Search			
Activate/Deactivate System Accounts Can activate/deactivate System Accounts.	Task View included roles	0	Client Diagnosis (Full Acce Full access to the Diagnosis field	iss) ds on Client Diagnosis screens under Client List/Activity miscion/Diagnosis, or Treatment/Ty Plan/Diagnosis	Task Group View included roles	c
Admission (Full Access) full access to all options under Client List/Activity List/Admission.	Task Group View included roles	0	Clinical (Full Access)	understen Offent Lat/Astrony Lat	Task Group	•
Admission (Read-Only) Read-Only access to all options under Client List/Activity List/Admission.	Task Group <u>View</u>	0	Puil access to all clinical options	under the Client Lise/Activity List.	<u>View included roles</u>	
Admission Delete Vilow the ability to delete Admission records under Client List/Acitivity List/Admission.	Task View 1. Move C	lient Diag	nosis and			
Agency Administrator This role should be assigned to the person in charge of updating an Agency record Agency Profile. Contacks, Governance, Announcements, Tx Team Groups, etc.). This role always access to all sub-menus under the Agency List, as well as Group Notes and the reports section.	Tase View Clinical (Fu	II) to Assig	gned Roles			
Agency Billing Full access to the Agency Billing screens under Agency/Billing.	Task Group View included roles	0				
Agency Events (Full Access) This role will give the user the ability to enter not client specific Events at the Agency level.	Task Group View included roles	0				
Agency Events (Read-only) This role will give the user the ability to access Events at the Agency level in read only node.	Task Group View included roles	0				
Agency H835 Management Allows access to the Agency H835 Management screen.	Task Group View included roles	Ο.				

18. Make Sure to Call Staff to Coordinate Reset Credentials Link or you will probably have to do it again

Division of Driver Education, Adam Assessor 🖌				2 Click Done Editing
🛔 Staff Member Wo	1. Click Reset Cred	entials	✓ DONE EDITING	
User ID: a.assessor.dde		Lock	Agency Access Reset Credentials	Additional items
System Roles: Agency Roles Client Diagnosis (Full Access)	• CI	linical (Full Access)	Manage roles	Define Employment Profile     Manage Accounts and Roles     Add Facility Assignment     Add Access Category
Facility Assignments			~	Add Professional Qualification     Add Email     Add Email     Add Phone Number
Adam Assessor Poggam Assignments: Driver Education Add Program Assignments Add Facility Assignments	Effective: 11/01/2018 -	11/01/2018 - Hours Per Week 40	, o , o	Add Address     Add Identifier     Add Language     Add Checklish Item     Add Checklish Item     Add Checklish Item     Add Training     Add Training     Add Training
Contact Information			*	> Add Domain
	Chelson of Driver Education, Adum Assessor 2  User ID a.assessor.dde  System Rales  Agency Rates  Cilient Diagnosis (Full Access)  Facility Assignments  Adam Assessor Program Assignments  Oriver Education  Add Program Assignments  Contact Information  Parkneyd Method (2) Cataer	Checker of Driver Education, Adam Assessor	Childrer of Driver Education, Adam Assessor 2         Image: Staff Member Web         Liser/D       assessor.dde         Liser/D       assessor.dde         System Rales:       Agency Reles         - Client Diagnosis (Full Access)       - Clinical (Full Access)         Facility Assignments       1101/2018 -         Physican Assignments       - Add Program Assignments         - Add Program Assignments       - Mod Program Assignments         - Add Facility Assignments       - Mod Facility Assignments         - Add Facility Assignments       - Mod Program Assignments         - Add Facility Assignments       - Moder Facility Assignments         - Add Facility Assignments       - Moder Facility Assignments         - Add Facility Assignments       - Moder Facility Assignments         - Developed Mediced Of Context	Cender of Driver Education, Adam Assessor 2  Staff Member W  Luck Agency Access Reset Credentials  Done EDITING  Done EDITING  Done EDITING  Luck Agency Access Reset Credentials  System Rales  Agency Reles  C Clinctal (Full Access)  C Clinctal (Full Access)  C Clinctal (Full Access)  Facility Assignments  Adam Assignments  Adam Assignments  Ada Program Assignments  Ada Program Assignments  Ada Program Assignments  Contact Information  Contact Information  C Packers Medved (2 Catear

If you have any questions, please call the WITS Staff or email WITSHELP@doh.hawaii.gov.