

Adding a New WITS User (Prevention)

To add a new WITS user, the user must have either the Staff Administrator role or the Human Resources (Full Access) role attribute. If the Agency/Staff List menu pick is displayed, the user has one of the Staff Administration role attributes (Human Resources, Staff Management, Reset Logon).

Note: Standard User will Require the following roles: ClientProfile (Full Access), Intake (Full Access), Prevention Plan(Full Access), Group Notes (Full Access) and Prevention (Full Access)

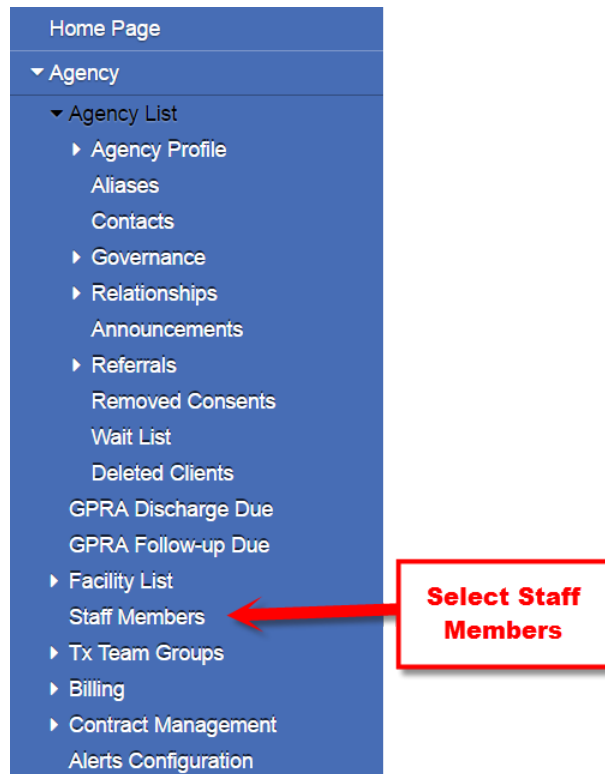
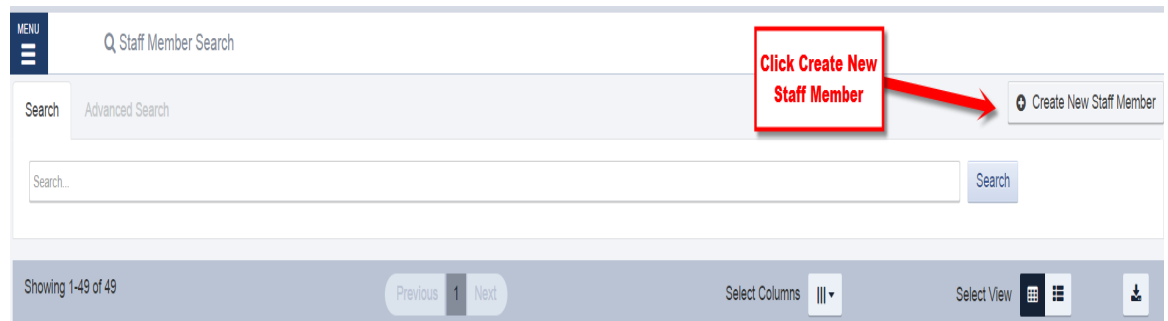


Figure x.1 – Agency Menu with Staff List Menu Pick

To add a new WITS user, click on the Staff Members menu pick. The Agency Staff Search screen will be displayed.

- a. Click on 'Create New Staff Member'.



b. Enter, at a minimum, the following Staff Profile information.

Create New Staff Member ✕

Prefix:

First:

Preferred:

Middle:

Last:

Suffix:

Gender:

**At a Minimum
Add the following**

Completion Requirements

- + Add Email Address ?
- + Add Staff Member Type ?
- + Add Employment Start Date ?

Additional items

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

**Follow Completion
Requirements**

- 1) First Name
- 2) Last Name
- 3) Select Gender (1 = Male; 2 = Female; 7 = Unknown)
- 4) Email address which is required for receiving system assigned password and PIN.
- 5) Select the Staff Type from the dropdown list.
- 6) Select the Manager Name from the dropdown list. If the manager name is not there, you can just add the Staff Profile information of the manager.
- 7) Start Date – Date staff started working for the agency

NOTE: If the staff will not be accessing WITS, you can stop here. The following steps are required for the staff to access WITS.

Email Address:

 Primary

Job Title:

 Include Job Title in Display Name
Staff Member Type:

Employment Type:

Employment Date Range:
 – Has end date
Full Time Equivalent:

Taxonomy Type:

Taxonomy Classification:

Taxonomy Specialization:

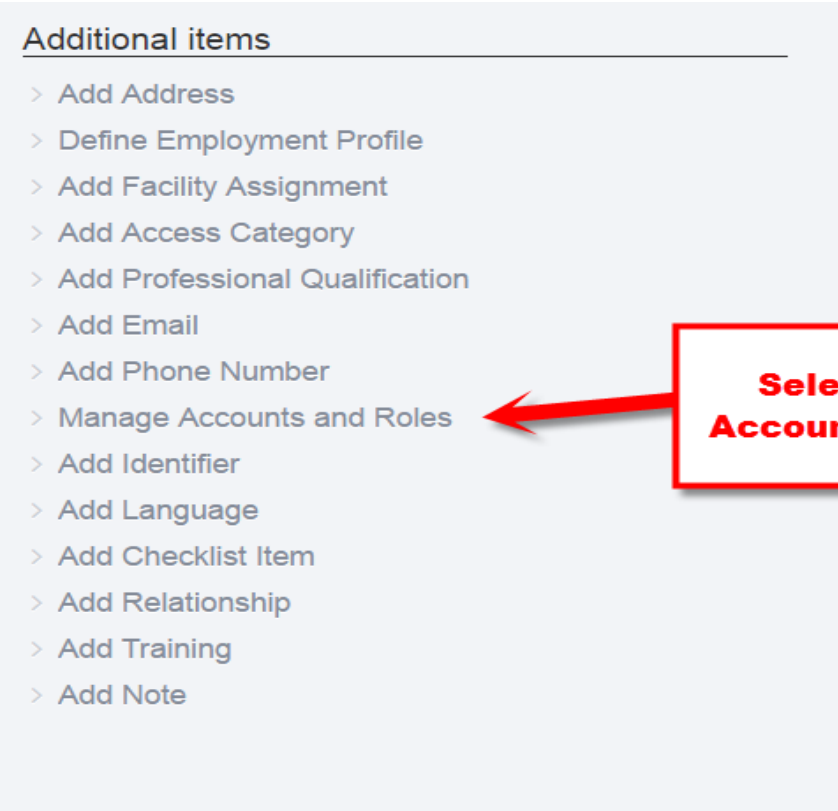
To allow access to the WITS system the following information needs to be added:

- c. Create User Logon ID. Go to Account Information screen by clicking on Account Information menu pick.



The screenshot shows a 'User ID:' label above a text input field containing the placeholder text 'FirstName.LastName'. A red arrow points from a red-bordered callout box to the input field. The callout box contains the text 'Use FirstName.LastName convention'. Below the input field are two buttons: 'Create Account' and 'Cancel'.

- 1) Assign a user logon ID. WITS practice is to use the following user logon Id naming format – staff first name-period-staff last name, e.g. joseph.manager.
- 2) Click on the 'Create Account' under Administrative Actions.



The screenshot shows a menu titled 'Additional items' with a list of options, each preceded by a right-pointing chevron (>). A red arrow points from a red-bordered callout box to the 'Manage Accounts and Roles' option. The callout box contains the text 'Select Manage Accounts and Roles'.

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

d. Assign Roles (1) and Role Attributes (2). See sample system access settings.

Agency Roles ✔ I am done

G, Staff

Available Roles Hide Inherited Roles Show description Assigned Roles Show description

Search... Search...

Role Name	Role Type	Action
Activate/Deactivate System Accounts Can activate/deactivate System Accounts. View included roles	Task	+
Admission (Full Access) Full access to all options under Client List/Activity List/Admission. View included roles	Task Group	+
Admission (Read-Only) Read-Only access to all options under Client List/Activity List/Admission. View included roles	Task Group	+
Admission Delete Allow the ability to delete Admission records under Client List/Activity List/Admission. View included roles	Task Group	+
Agency Administrator This role should be assigned to the person in charge of updating an Agency record (Agency Profile, Contacts, Governance, Announcements, Tx Team Groups, etc.). This role gives access to all sub-menus under the Agency List, as well as Group Notes and the Reports section. View included roles	Task Group	+
Agency Billing Full access to the Agency Billing screens under Agency/Billing. View included roles	Task Group	+

MENU Back to Search Staff Member Workspace DONE EDITING Print Refresh Close

Agency Roles ✔ I am done

G, Staff

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Agency Billing Full access to the Agency Billing screens under Agency/Billing. View included roles	Task Group	+
Agency Events (Full Access) View included roles	Task Group	+
Client Diagnosis Full access to the Diagnosis fields on Client Diagnosis screens under Client List/Activity List/Assessments/Diagnosis, Admission/Diagnosis, or Treatment/Tx Plan/Diagnosis. View included roles	Task Group	-
Clinical (Full Access) Full access to all clinical options under the Client List/Activity List. View included roles	Task Group	-
Clinical Supervisor This role allows the user to manage the Clients with Consents from Outside Agencies list and to manage linked Consents. This role can sign off on TX Review on behalf of other TX Review team members. In Hawaii, the role expands the Clinical (full) role to allow access across Programs (Program restriction on the Clinical (full) role only exists in Hawaii). View included roles	Task Group	-
Release To Billing Allows user to release encounters to Billing by the Release To Billing action link on the Encounter Profile screen. View included roles	Task Group	-
SignOff Treatment Plan Sign Off on a Treatment Plan View included roles	Task	-
SignOffAndFinalizeTreatmentPlan Sign off and finalize a treatment plan View included roles	Task	-

e. Prevention Staff Roles as follows

The screenshot shows the 'User Account' interface for user 'alan.prev'. It includes buttons for 'Lock Agency Access' and 'Reset Credentials'. Under 'System Roles', there are no roles listed. Under 'Agency Roles', there are two columns of roles:

- Agency Billing
- Billing Encounter List
- Group Notes (Full Access)
- Invoice Attestation
- Prevention Plan(Full Access)
- Agency Invoicing (Full Access)
- ClientProfile (Full Access)
- Intake (Full Access)
- Prevention (Full Access)
- Prevention Statewide Initiative

A '+ Manage roles' button is located to the right of the Agency Roles list.

f. Prevention Billing Roles

This screenshot shows the 'User Account' page for 'alan.prev' with a red box highlighting the 'Required Billing Roles' section. To the right, there is a list of 'Additional items' that can be added to the user profile:

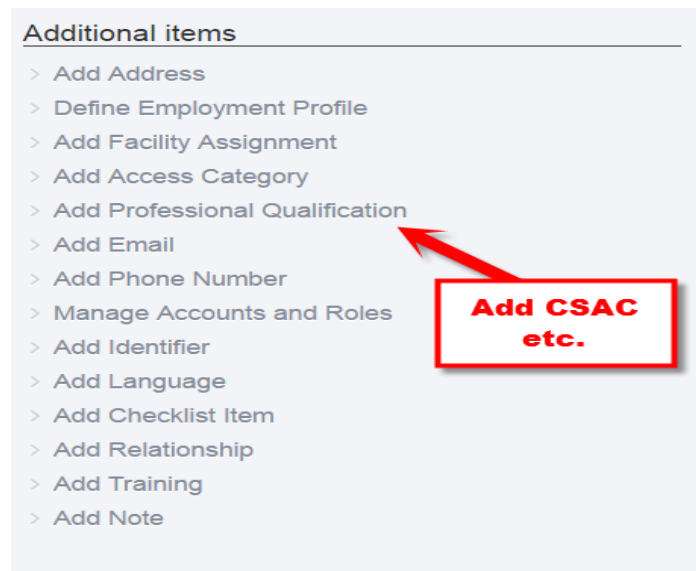
- > Add Address
- > Define Employment Profile
- > Add Facility Assignment
- > Add Access Category
- > Add Professional Qualification
- > Add Email
- > Add Phone Number
- > Manage Accounts and Roles
- > Add Identifier
- > Add Language

g. Assign staff to facility(s)

The screenshot shows the 'Facilities' selection interface. It features two search bars and a list of facilities: Residential, Main Office, Helping House, and Lanai Office. A red box with an arrow points to the right side of the interface, labeled 'Add Selected Facilities to right side'. Below the facilities list, there is an 'Effective:' section with two date pickers and a checked 'Has end date' checkbox. A red box with an arrow points to the date pickers, labeled 'Add Effective Date'. At the bottom, there are 'Save' and 'Cancel' buttons.

- 1) Select the facilities. At least one (1) facility is required for anyone accessing WITS.
- 2) Select the client access categories. If this feature is not used, leave as is, however, please ensure the when creating client profiles, that no Access Category is assigned.
- 3) Assign facility-programs that the user will have access to. This allows the user to view the information in the program enrollment.
- 4) Add Professional Qualification

NOTE: If a user is assigned the Clinical Supervisor role, they have access to all programs in the Facilities Approved For selected box.



A screenshot of a form for adding a new WITS user. The form includes fields for 'Category' (with a dropdown menu showing 'Certification', 'Degree', and 'License'), 'Type' (with a dropdown menu), and 'Issuer Name' (with a text input field). Below these is a checkbox labeled 'Include in Display Name' which is currently unchecked. A red arrow points from a red-bordered box containing the text 'Check Box' to this checkbox. Below the checkbox is an 'Effective:' section with two date pickers and a checked checkbox labeled 'Has end date'. At the bottom are 'Save' and 'Cancel' buttons.

Staff Member Workspace

Back to Search

Professional Qualifications

Certification	Certified Substance Abuse Counselor	07/01/2013 -
+ Add Professional Qualifications		

Contact Information

Preferred Method Of Contact:

- ✉ yoseb.afsharzadeh@doh.hawaii.gov Primary
- + Add Email Addresses
- ☎ No Items
- + Add Phone Numbers
- 📍 No Items
- + Add Physical Addresses

Click Done Editing when Finished

✓ DONE EDITING

Standard User Roles:

User Account

User ID: **Standard User**

System Roles:

Agency Roles

- ClientProfile (Full Access)
- Intake (Full Access)
- Prevention Plan(Full Access)
- Group Notes (Full Access)
- Prevention (Full Access)

Billing User Roles:

User Account

User ID: **Billing User**

System Roles:

Agency Roles

- Agency Billing
- Billing Encounter List
- Clinical (Full Access)
- Group Notes (Full Access)
- Invoice Attestation
- Prevention (Full Access)
- Prevention Statewide Initiative
- Agency Invoicing (Full Access)
- ClientProfile (Full Access)
- Create Agency Claim Batch
- Intake (Full Access)
- Non-Treatment Team Access
- Prevention Plan(Full Access)