

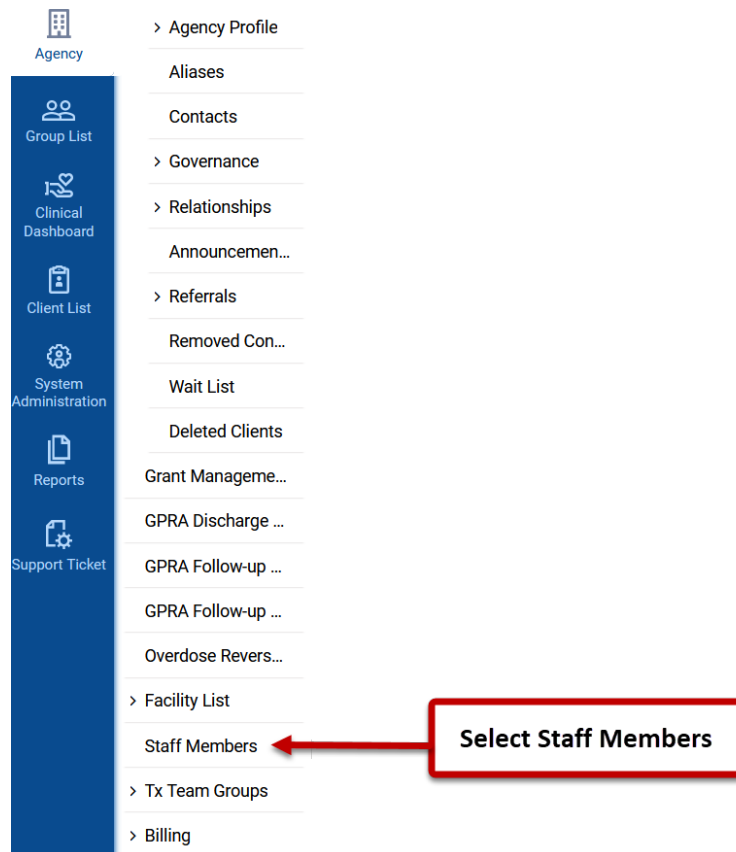
Adding a New WITS User

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).

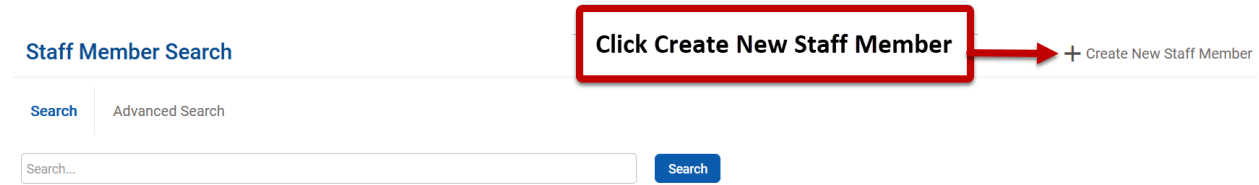
Note: Standard User will require the following five roles

- Client Profile (Full Access)
- Intake (Full Access)
- Prevention Plan (Full Access)
- Group Notes (Full Access)
- Prevention (Full Access)

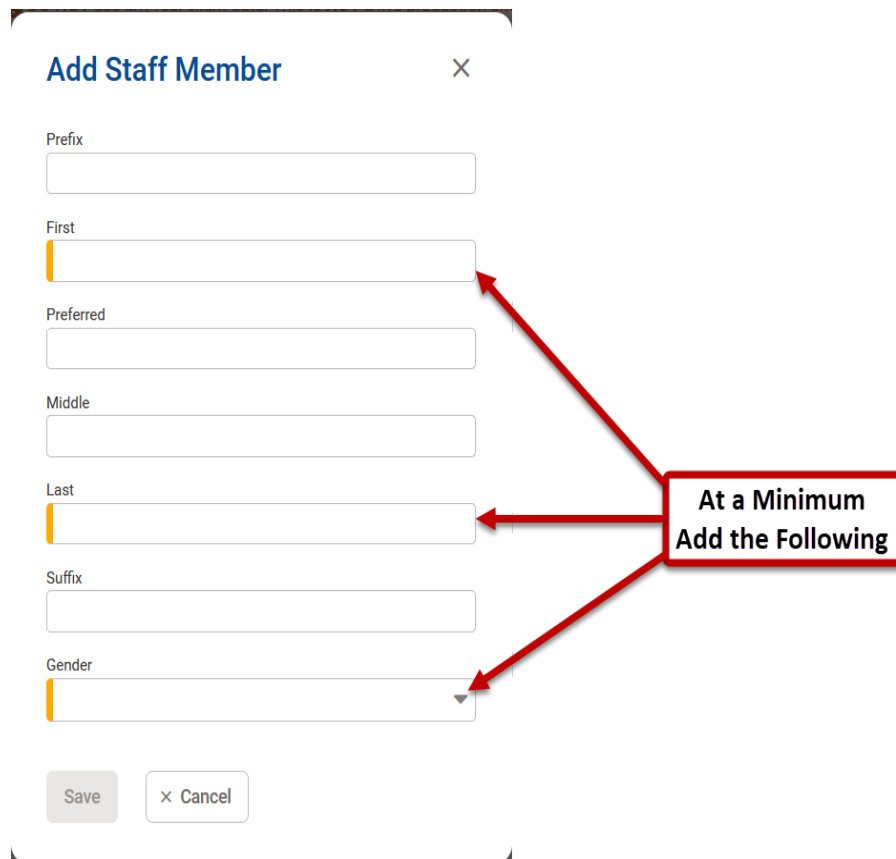
1. To add a new WITS user, click on the **Staff Members**.



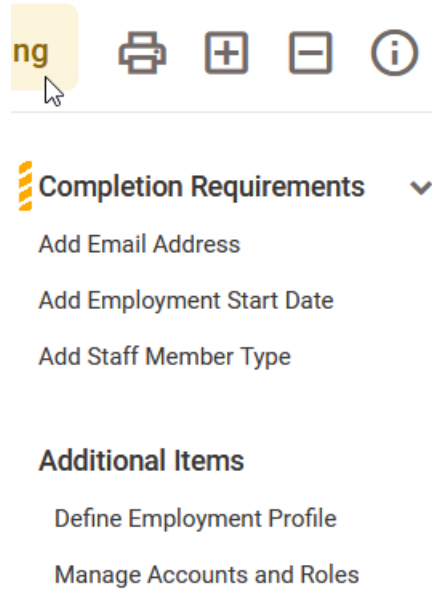
2. Click **Create New Staff Member** on the right top corner.



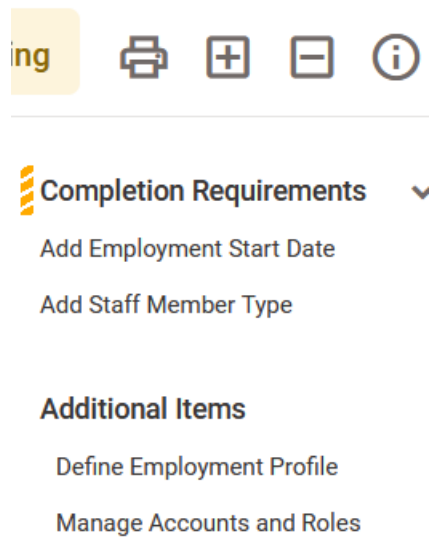
3. First name, last name, and gender (female, male, other) are required fields.



4. Once you save first name, last name, and gender, it will lead to **Staff Profile** page. Find **Completion Requirements** from the right panel. Click **Add Email Address**. Email address is required to set up the login credential.



5. After entering the email address, the **Add Email Address** selection will disappear. **Add Employment Start Date** and **Add Staff Member Type** should still be visible.



6. Add **Start Date**. Select **Has end date**. You do not need to add the end date. However, you need to indicate that the position has an end date. **Staff Member Type** is also required information. Please enter other relevant information such as Job Title. Click **Save** upon completion. The **Completion Requirements** section will disappear.

The image shows a form with several fields and a callout box. The fields are: Job Title, Include Job Title in Display Name (checkbox), Staff Member Type, Employment Type, Employment Date Range (with a calendar icon and a minus sign), Has end date (checkbox), Full Time Equivalent, Taxonomy Type, Taxonomy Classification, and Taxonomy Specialization. At the bottom are 'Save' and 'Cancel' buttons. Three red callout boxes with arrows point to specific elements: Box 1 points to the 'Has end date' checkbox; Box 2 points to the 'Job Title' and 'Staff Member Type' fields; Box 3 points to the 'Save' button.

2. Add Staff Member Type and other relevant information

1. At minimum, add Start Date and click Has End Date

3. Click Save

7. Create User Logon ID following the below steps.

a. Find **User Account** section as shown at the bottom of this screenshot.

The screenshot shows a user profile page with three main sections: Profile, Employment Profile, and User Account. The 'User Account' section is highlighted with a red box, and a red arrow points from a callout box containing the text 'User Account is found here.' to the 'User Account' section header. The 'User Account' section includes a '+ Add Account' link. To the right of the main content is a sidebar with 'Completion Requirements' and 'Additional Items' sections, each with a list of options.

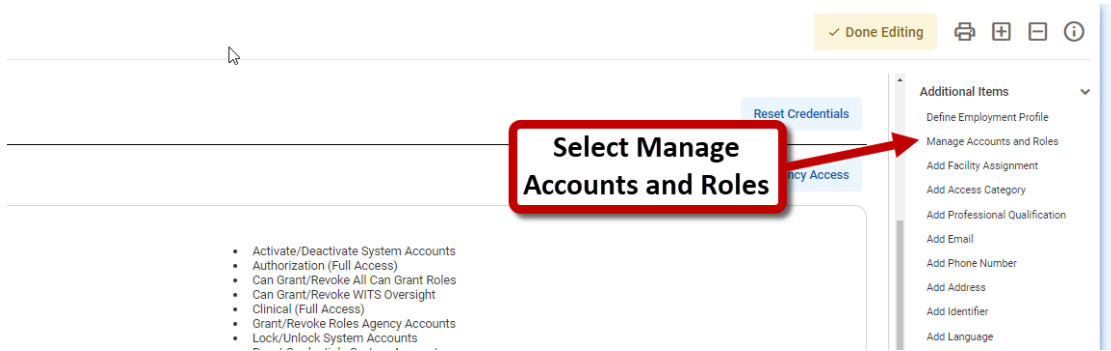
b. Click **Add Account** to create the new user account with a new user ID.

The screenshot shows the 'User Account' section with a red box around the '+ Add Account' link. A red arrow points from a callout box containing the text 'Click Add Account' to the '+ Add Account' link.

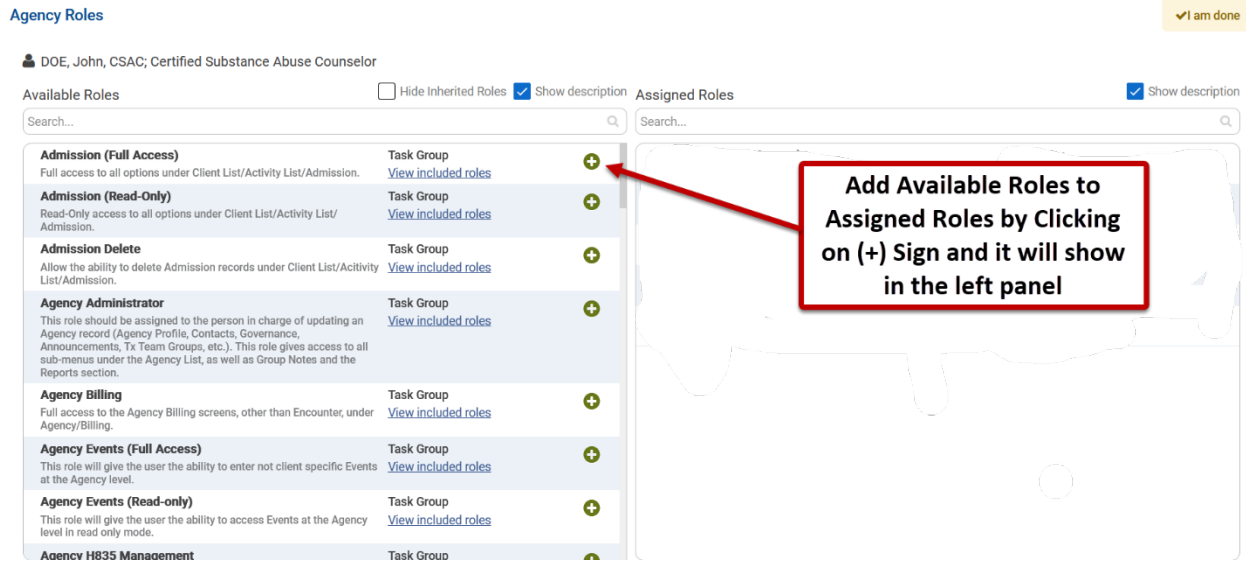
c. Create a new **User ID** by following the User ID Format:
FirstName-period-LastName (e.g., John.Doe)

The screenshot shows the 'User Account' section with a form for creating a new user account. The 'User ID' field contains the placeholder text 'FirstName.LastName'. Below the field are two buttons: 'Create Account' and 'Cancel'.

8. Select Manage Accounts and Roles.



9. Assign Roles and Role Attributes by clicking the plus sign (+).



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10. If you need to remove the role from the right panel, click the minus sign (-). When finishing the role selection, click **I am done**.

Agency Roles

DOE, John, CSAC; Certified Substance Abuse Counselor

Hide Inherited Roles Show description

Available Roles

| Role Name | Description | Type | Action |
|------------------------------------|---|------------|---------------------------------------|
| Admission (Full Access) | Full access to all options under Client List/Activity List/Admission. | Task Group | View included roles + |
| Admission (Read-Only) | Read-Only access to all options under Client List/Activity List/Admission. | Task Group | View included roles + |
| Admission Delete | Allow the ability to delete Admission records under Client List/Activity List/Admission. | Task Group | View included roles + |
| 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. | Task Group | View included roles + |
| Agency Billing | Full access to the Agency Billing screens, other than Encounter, under Agency/Billing. | Task Group | View included roles + |
| 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 + |
| Agency Events (Read-only) | This role will give the user the ability to access Events at the Agency level in read only mode. | Task Group | View included roles + |

Assigned Roles Show description

| Role Name | Description | Type | Action |
|-------------------------------------|---|------------|---------------------------------------|
| ClientProfile (Full Access) | Full access to all options under Client List/Client Profile. | Task Group | View included roles - |
| Group Notes (Full Access) | Enables the 'Add Group' link on the Group List screen. | Task Group | View included roles - |
| Intake (Full Access) | Full access to all options under Client List/Activity List/Intake. | Task Group | View included roles - |
| Prevention (Full Access) | This role provides full (read/write) access to Prevention screens. | Task Group | View included roles - |
| Prevention Plan(Full Access) | This role provides full (read/write) access to Prevention Plan screens. | Task Group | View included roles - |

Click "I am done" →

The below are example agency roles for **Standard User** and **Billing User**.

The screenshot displays two user profiles in a web interface. The top profile is for a 'Standard User', with the name highlighted in a red box. Below the name, there are sections for 'System Roles' (containing 'View Scheduler') and 'Agency Roles' (containing 'ClientProfile (Full Access)', 'Intake (Full Access)', 'Prevention Plan(Full Access)', 'Group Notes (Full Access)', and 'Prevention (Full Access)'). A '+ Manage Roles' link is visible to the right. The bottom profile is for a 'Billing User', also with the name highlighted in a red box. It includes a 'User Account' section with a 'User ID' field and a 'Reset Credentials' button. Below this is a 'HI-WITS Training' section with a 'Lock Agency Access' button. The 'Billing User' profile also has 'System Roles' (containing 'View Scheduler') and 'Agency Roles' (containing 'Agency Billing', 'Billing Encounter List', 'Clinical (Full Access)', 'Group Notes (Restricted 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', and 'Prevention Plan(Full Access)'). A '+ Manage Roles' link is also present to the right of the 'Billing User' profile.

Standard User

System Roles

- View Scheduler

+ Manage Roles

Agency Roles

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

▼ User Account

User ID: Reset Credentials

HI-WITS Training Lock Agency Access

Billing User

System Roles

- View Scheduler

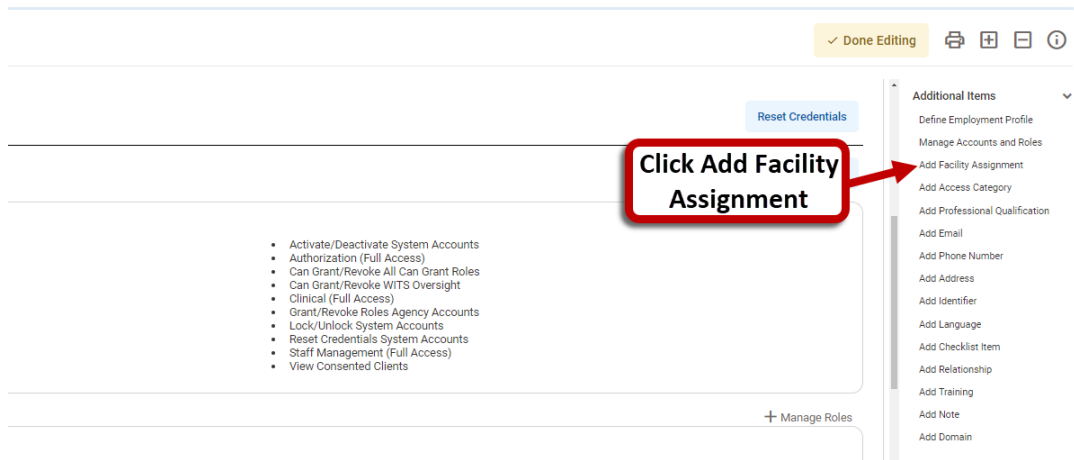
+ Manage Roles

Agency Roles

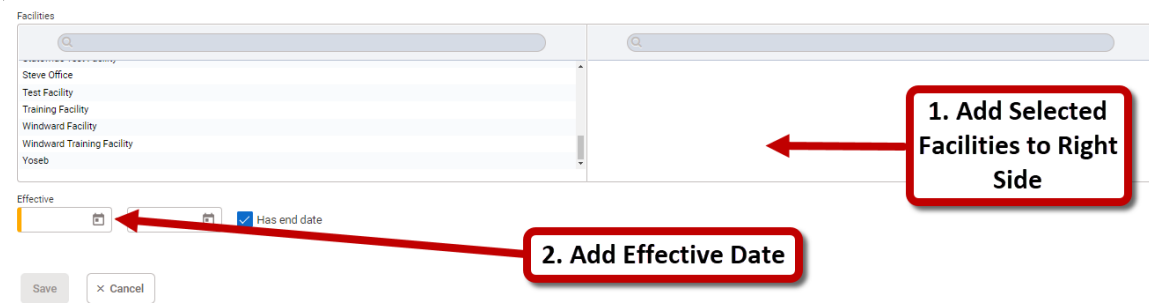
- Agency Billing
- Billing Encounter List
- Clinical (Full Access)
- Group Notes (Restricted Access)
- Invoice Attestation
- Prevention (Full Access)
- Prevention Statewide Initiative
- Agency Invoicing (Full Access)
- ClientProfile (Full Access)
- Create Agency Claim Batch
- Intake (Full Access)
- Non-Treatment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

11. Assign staff to facility and add effective dates.

a. Click **Add Facility Assignment**.

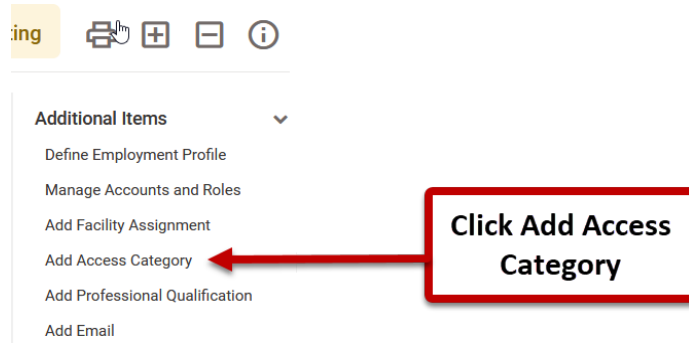


b. Add at least one facility to the right side. You can assign one or more facilities. If an end date is known, please add. At minimum, you need to add a start date and select **Has end date**.



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- c. Once facilities are assigned, click **Add Access Category**. If this feature is not used, you can leave it as is.
- d. *Note:* please ensure that when creating new profiles, correct Access Category is assigned. It is vey important for you not to assign improper access privilege to accounts.



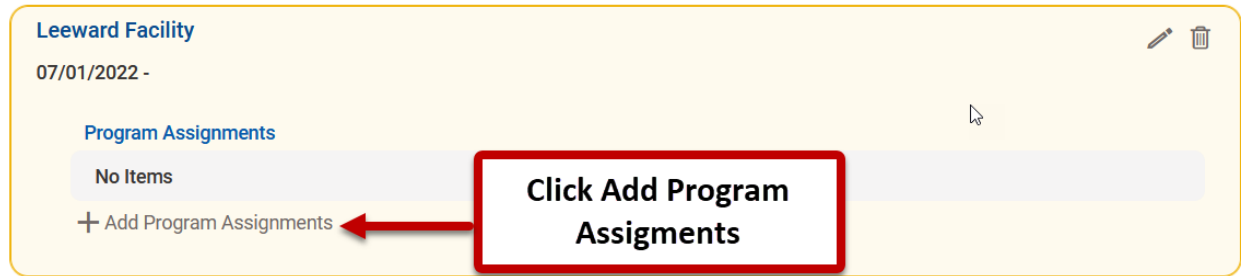
- e. Choose **Access Category** from the drop-down menu and click **Save**.

The image shows a form with a dropdown menu labeled "Access Category". The dropdown menu is open, showing the selected value "Adult". Below the dropdown menu are two buttons: "Save" and "Cancel".

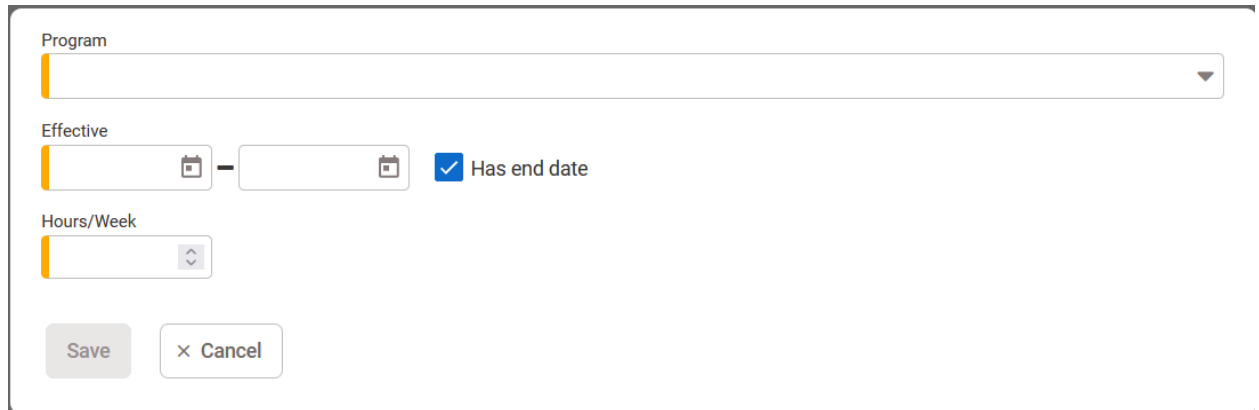
12. Assign facility programs that the new user will have access to. This will allow the user to view information about the program enrollment.

a. Go to **Facility Assignments** and click **Add Program Assignments**.

▼ **Facility Assignments**



The screenshot shows a yellow card for 'Leeward Facility' with a date range of '07/01/2022 -'. Below the card, there is a section titled 'Program Assignments' which currently shows 'No Items'. A red box highlights the '+ Add Program Assignments' button, with a red arrow pointing to it from a text box that says 'Click Add Program Assignments'. There are also edit and delete icons in the top right corner of the card.



The screenshot shows a form for adding a program assignment. It includes a 'Program' dropdown menu, an 'Effective' date range with calendar icons, a checked 'Has end date' checkbox, and an 'Hours/Week' dropdown menu. At the bottom, there are 'Save' and 'Cancel' buttons.

b. Add **Professional Qualification** (e.g, CSAC)

The screenshot shows a user management interface. At the top left, there is a partial label 'ing' and icons for print, add, delete, and info. A dropdown menu titled 'Additional Items' is open, listing several options: 'Define Employment Profile', 'Manage Accounts and Roles', 'Add Facility Assignment', 'Add Access Category', 'Add Professional Qualification', and 'Add Email'. A red box with the text 'Add qualification, e.g., CSAC' and a red arrow points to the 'Add Professional Qualification' option. Below the menu, the form fields are visible: 'Category' (Certification), 'Type' (Certified Substance Abuse Counselor (CSAC)), 'Issuer Name' (empty), 'Include in Display Name' (checked checkbox), 'Qualification Number' (empty), 'Effective' (date range with 'Has end date' checked), and 'Note' (empty). A red box with the text 'Check Box' and a red arrow points to the 'Include in Display Name' checkbox. At the bottom, there are 'Save' and 'Cancel' buttons.

c. If the new user is assigned to the Clinical Supervisor role, the person will be able to access to all programs in the assigned facilities.

d. Click **I am done**

If you have any questions, please contact the WITS Help Desk via phone or email (DOH.ADAD.WITSHelp@doh.hawaii.gov).