pennsylvania
DEPARTMENT OF DRUG AND
ALCOHOL PROGRAMS

PA WITS

Staff Administrator Guide

Applies to:

WITS Version 18.0+

Pennsylvania DDAP

Last Updated
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Contents

Part 1: Staff Management

As a Staff Administrator, your role is to create and manage staff. This means setting up new employees and giving them user accounts that control their access to facilities and screens through role assignments, as well as resetting passwords and troubleshooting login problems.

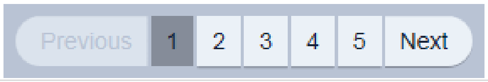
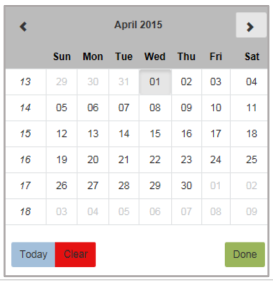
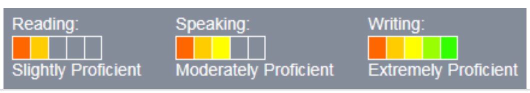
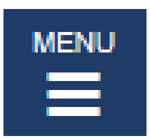
Staff Member List

Where:* *Agency* > *Staff Members

Table 2-1: Staff Member System Icons

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

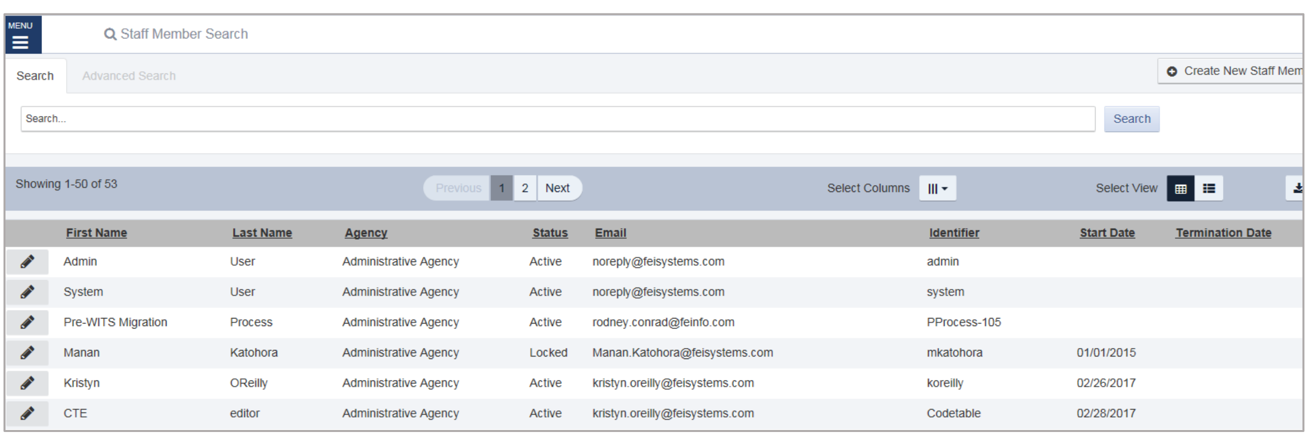
Icon	Description
From: ●●● To: 123	**Eye Icon**: Allows the user to see protected information hidden by dots. By hovering over the icon, they can now see the actual information contained within the field.
You cannot add more than one Social Security Number.	**Error Message**: The error message is localized and is generated where the error occurred.
	Required Field: Has a red bar to the right of the field. User must enter data to save.

Icon	Description
	**Discretionary Field**: Is not a mandatory field to complete the panel and will not affect the completion or saving of a record.
	**Pages**: Allows the user to page through all search results.
	**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.

Staff Member Search

Where:* Agency > *Staff Members

From the Staff Member Search screen you can use the search bar to find existing staff members by searching for their first name, last name, email address or User ID (the User ID is displayed in the column titled, "Identifier").

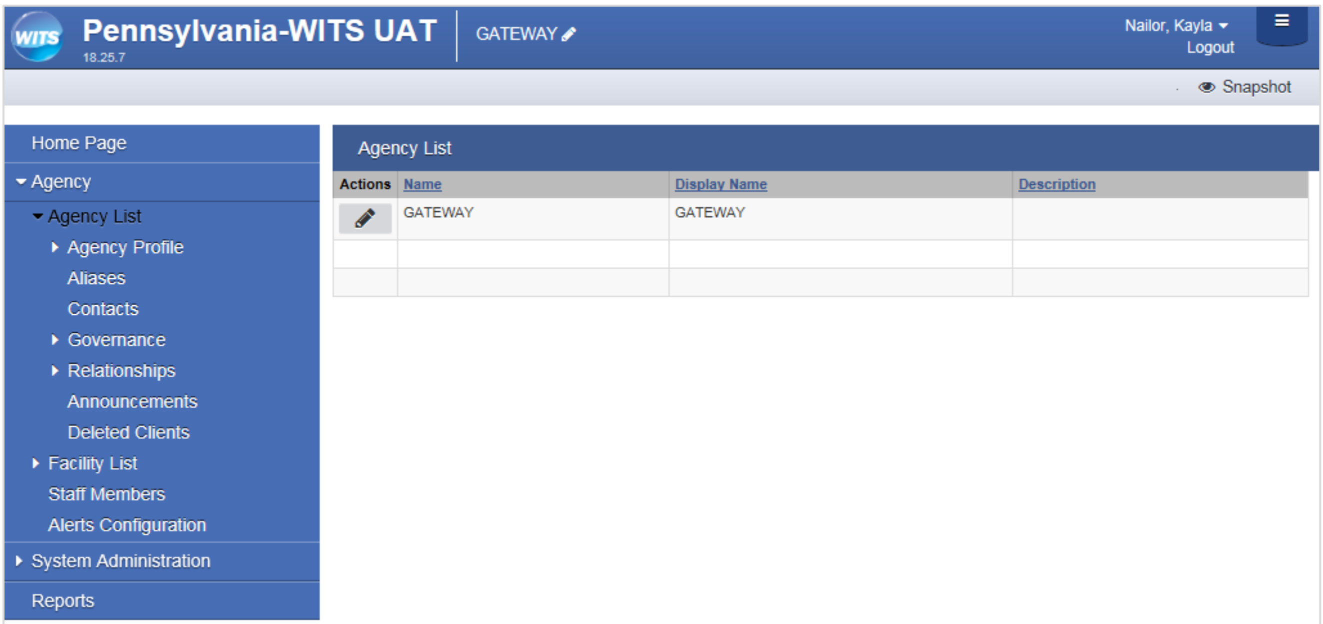


How to Setup a New Staff Member Account

Where: Agency > Staff Members

Create New Staff Member

1. On the left menu, click **Agency**, and then click **Staff Members**.



2. Click the Create New Staff Member button.

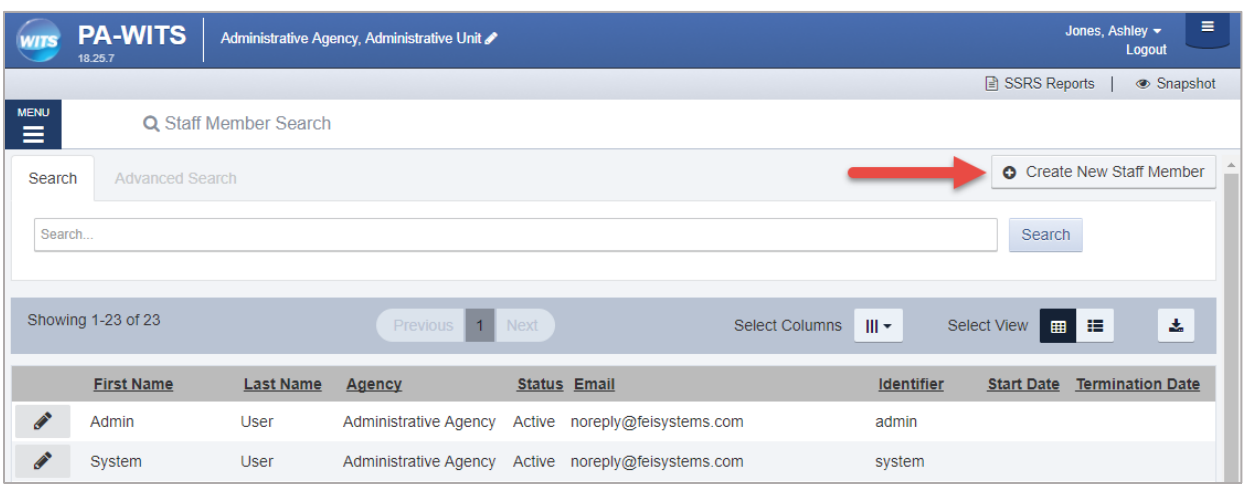


Figure 2-1: Staff Member screen

3. On the **Create New Staff Member** screen, complete at least the required fields. Required fields are indicated by a red bar to the right of the field.

Table 2-2: Create New Staff Member fields

Field	Description
Prefix	Optional field.
First	Type the staff member's first name.
Preferred	Optional field. Type the staff member's preferred first name.
Middle	Optional field.
Last	Type the staff member's last name.
Suffix	Optional field.
Gender	Select the staff member's gender from the drop-down list.

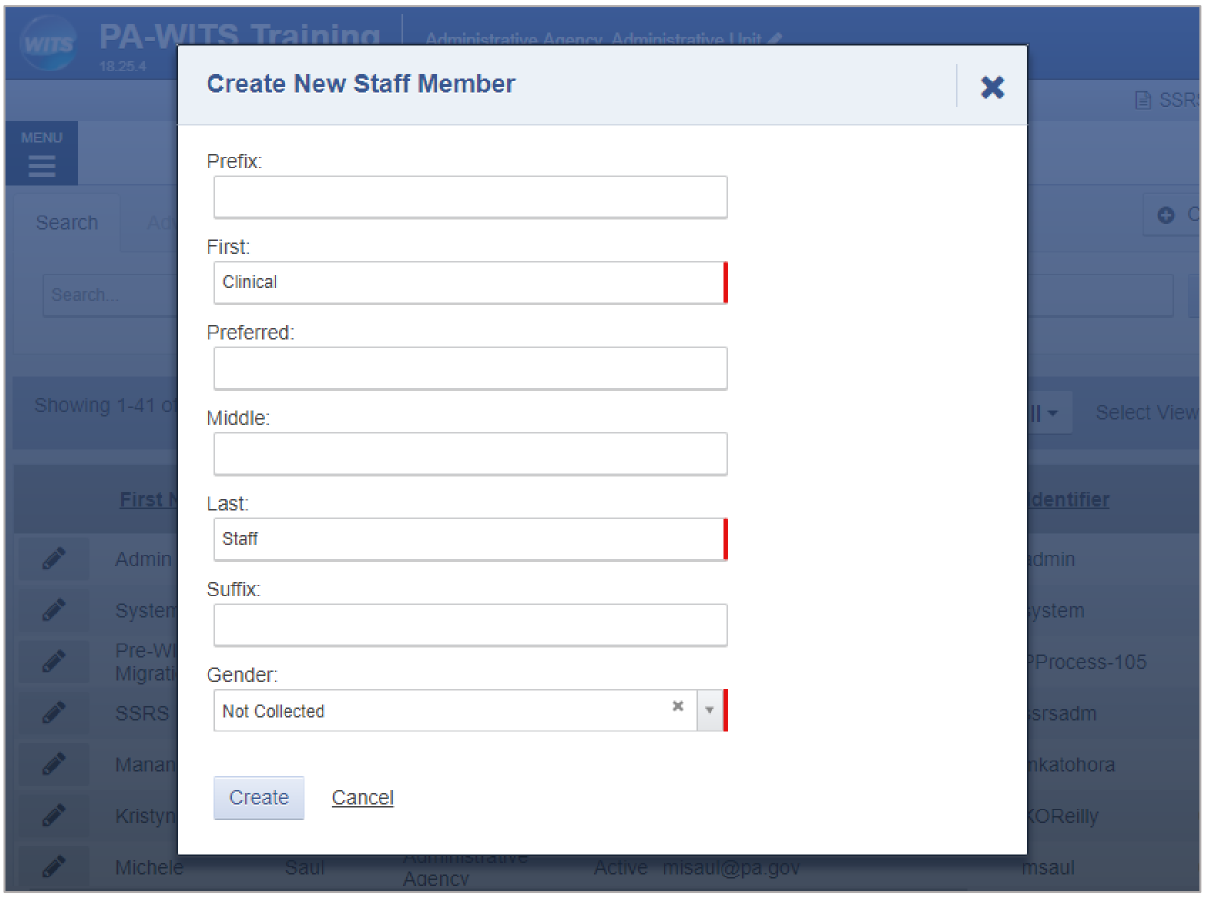


Figure 2-2: Create New Staff Member screen

4. Click **Create**. **Note**: The Create button will only appear when all of the required fields have been completed.

Completion Requirements

5. On the right side, point to the **Completion Requirements**. These completion requirements can be entered in any order.

Add Email Address

6. Click **Add Email Address**. This will open the Contact Information panel.

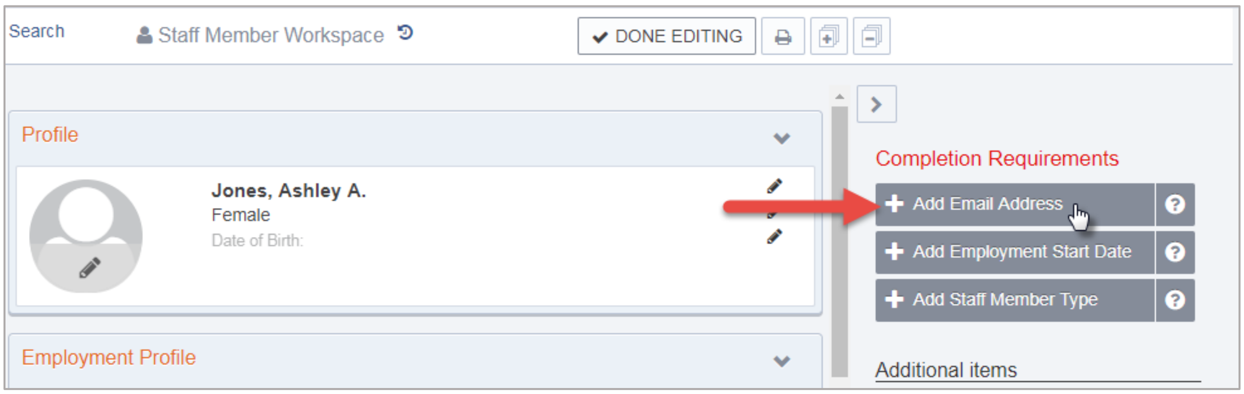
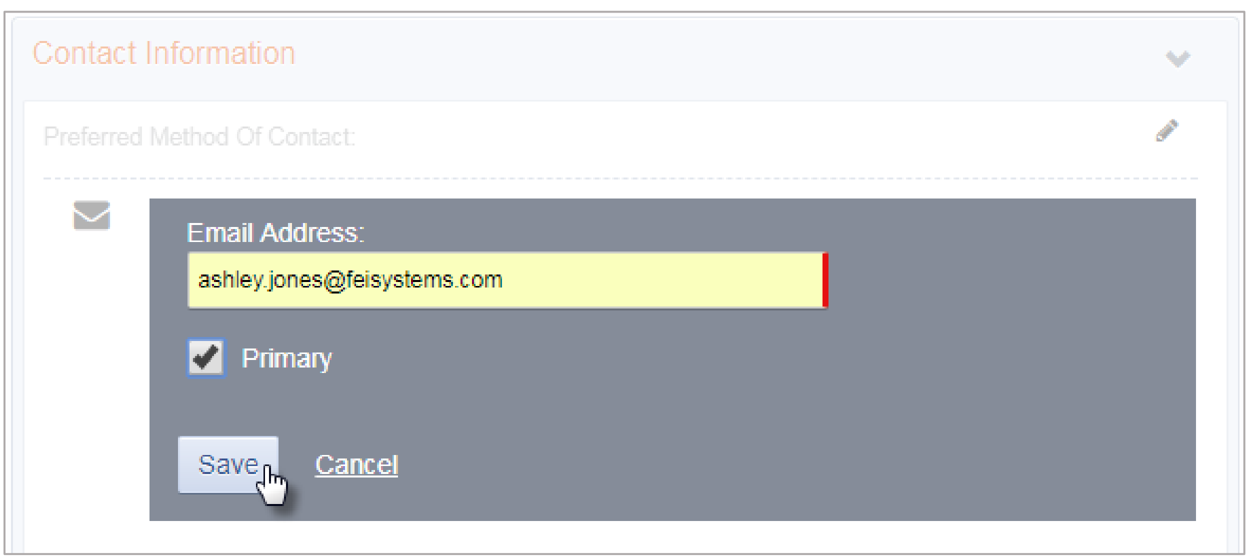


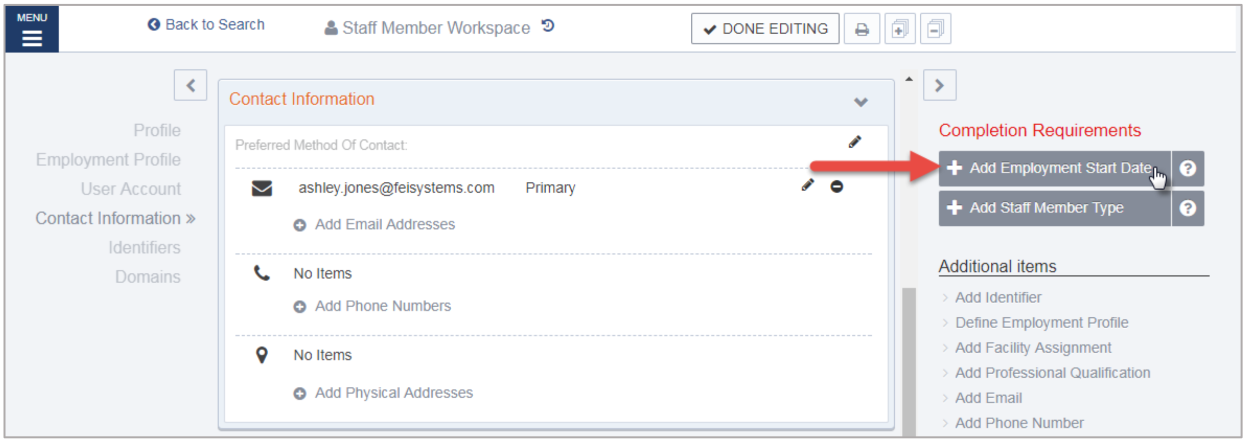
Figure 2-3: Completion Requirements, Add Employee Start Date

7. On the **Contact Information** panel, type the staff member's email address, check the Primary box and then click **Save**.



NOTE • Staff members can have more than one email address associated with their account, however at least one email address must be marked as "Primary". The Primary email address will receive email notifications for the user to access their account.

8. On the right side, point to the **Completion Requirements** and then click **Add Employment Start Date**. This will open the Employment Profile panel.



9. On the Employment Panel, in the **Employment Date Range** field, enter the employee's start date or use the calendar to select the start date. Stay on the Employment Panel.

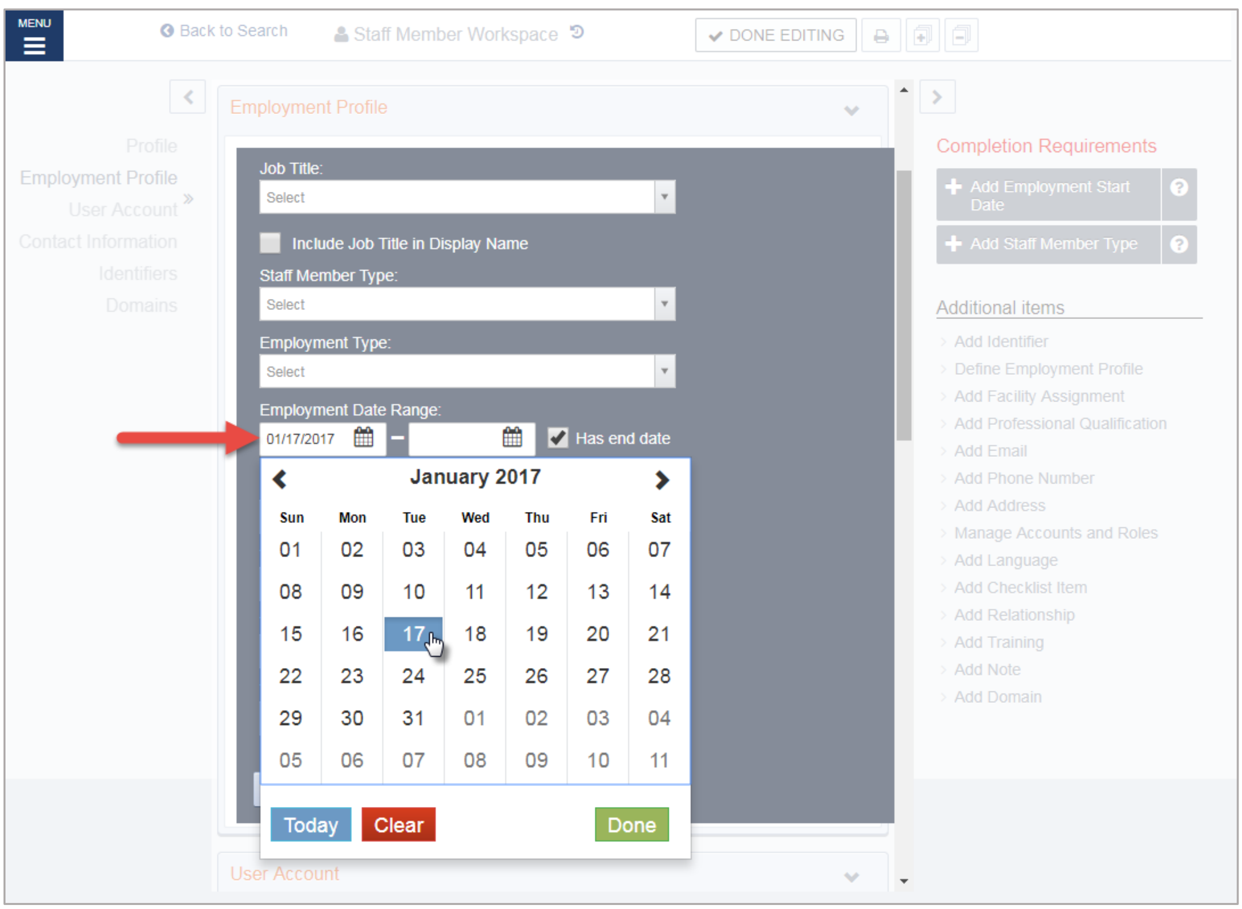


Figure 2-4: Employment Profile panel, Employee Date Range field

10. On the Employment Profile panel, in the **Staff Member Type** field, select an option from the drop-down list or search for a value.

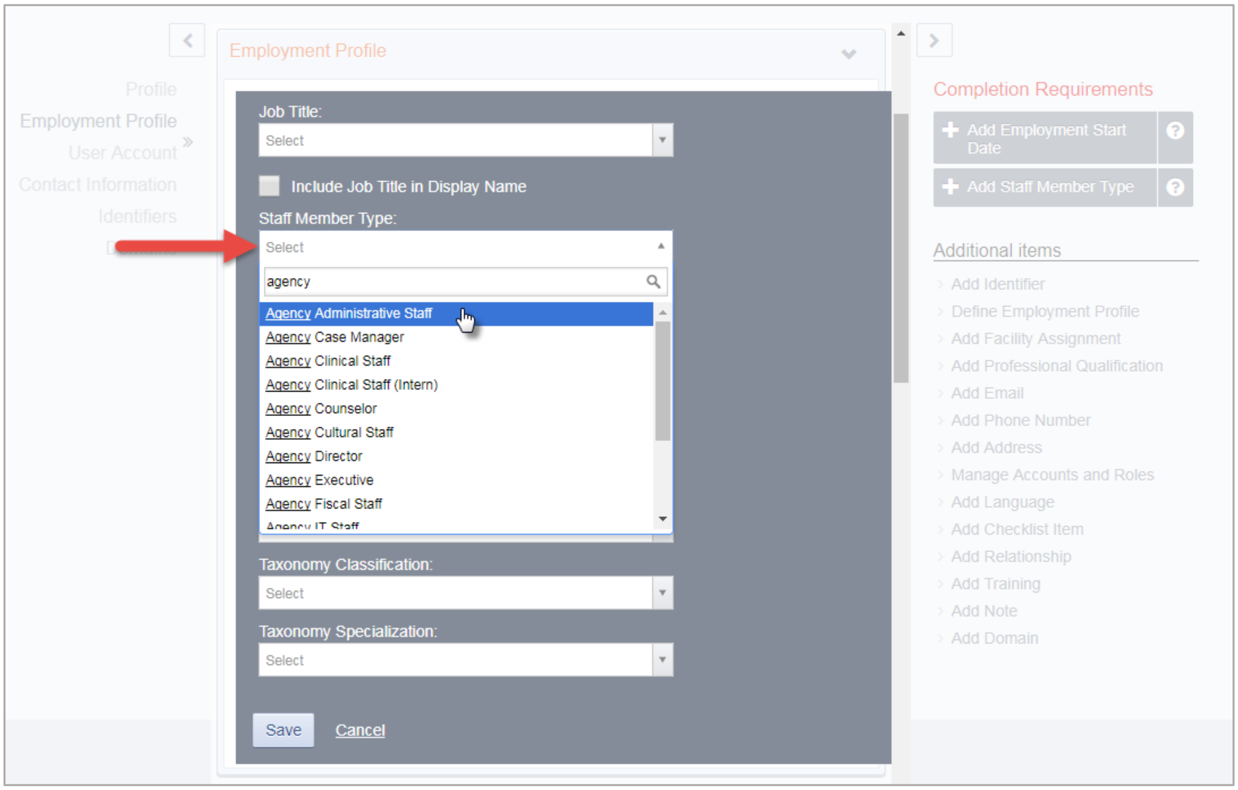


Figure 2-5: Employment Profile panel, Staff Member Type field

11. On the Employment Profile panel, click **Save**.

NOTE • On the Employment Profile panel, certain options in the **Staff Member Type** field control additional features within WITS. If a Selecting the option, "Clinical Supervisor"

Create User Account

Once items in the Completed Requirements sections have been met for a Staff Member, a user account can be created for the staff member. The user account will allow the staff member to log into WITS and perform various functions based on the roles granted to their user account.

12. In the **User Account** panel, click **Add Account**.

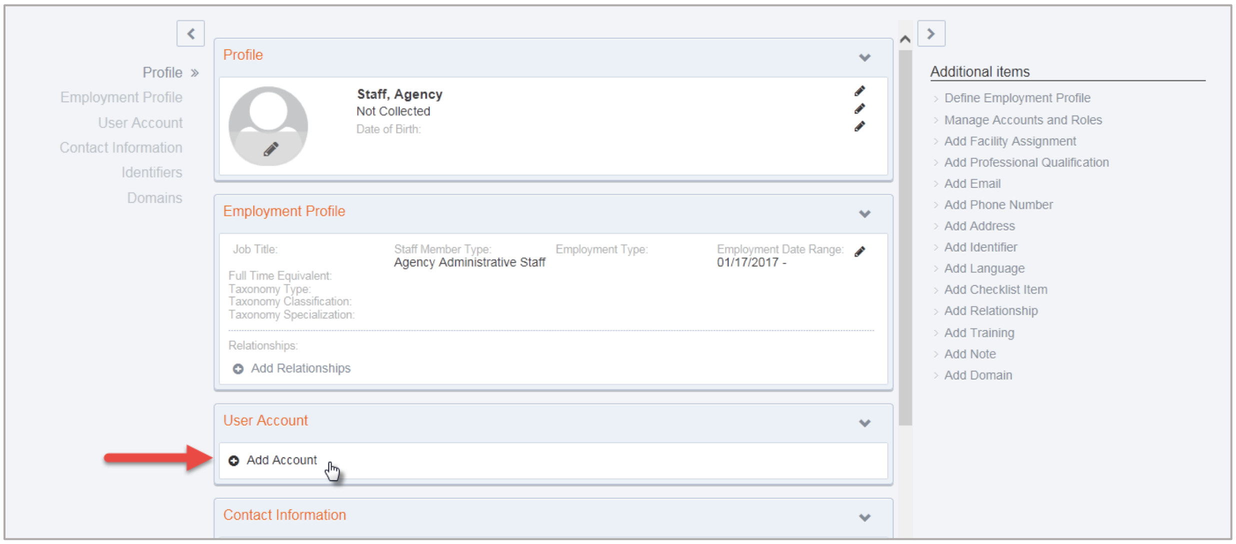


Figure 2-6: User Account panel, Add Account

13. In the **User ID** field, type the staff member's login name. **Note**: The User ID must be unique for each staff member.

14. In the **Email Address** field, type the staff member's email address. **Note**: WITS will send important login information using the email address provided in this section. The login information will only be valid for 24 hours.

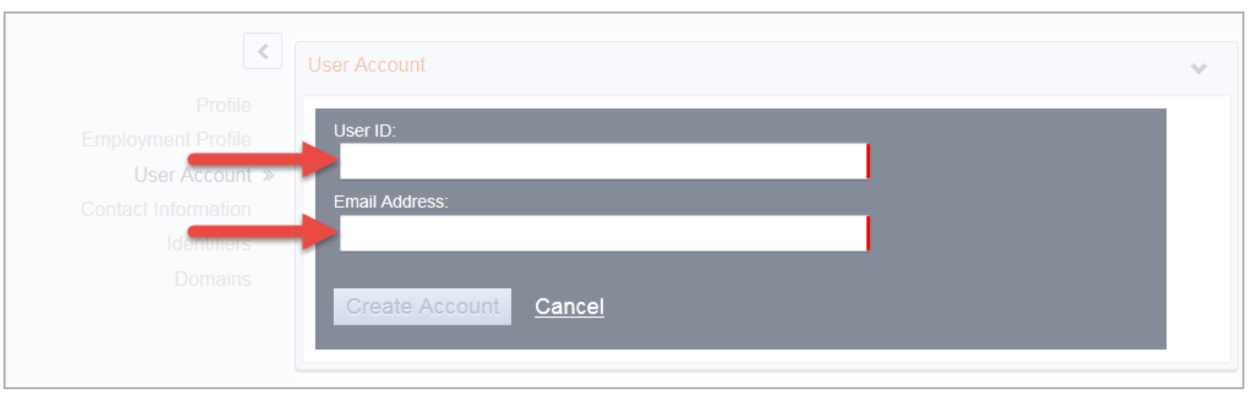


Figure 2-7: User Account panel, required fields

15. Click Create Account.

User Roles

After creating the User ID, roles can be granted to the staff member. When adding roles, it's important to consider the type of data the individual staff member will be entering and what type of information the individual needs access to within WITS.

Please see *"Part 2: DDAP Workflow Suggested Role Assignments"* below for information on role assignments for PA users.

Assign User Roles

16. In the User Account panel, click Manage roles.

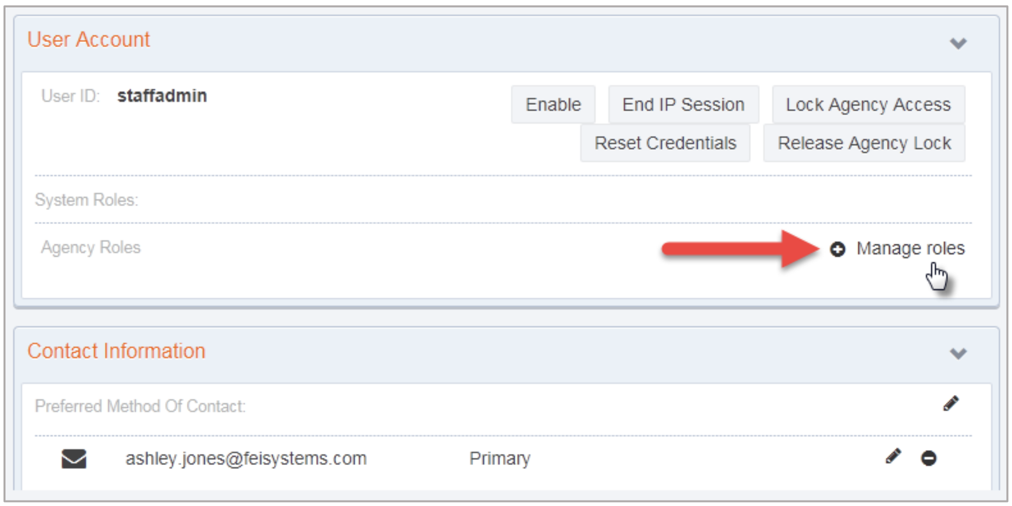


Figure 2-8: User Account panel, Manage Roles link

Manage Roles Screen: User Interface

There are two panels on the Manage Roles screen. The left panel displays a list of **Available Roles**, while the right panel displays a list of **Assigned Roles**. See Figure 2-9 for additional information about features displayed on the Manage Roles screen.

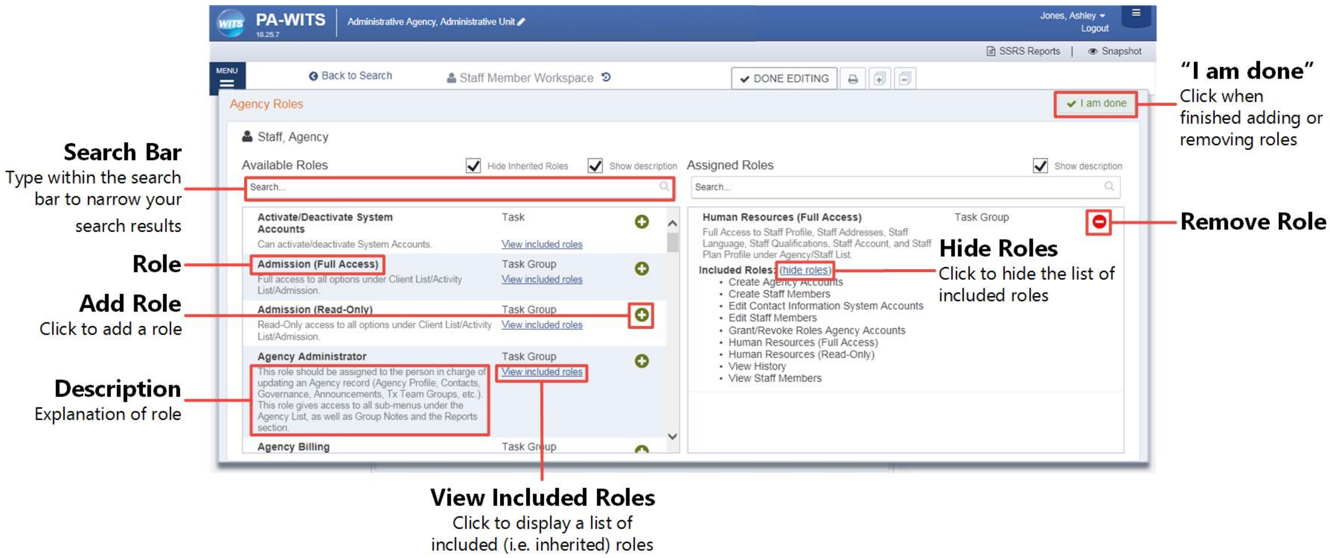
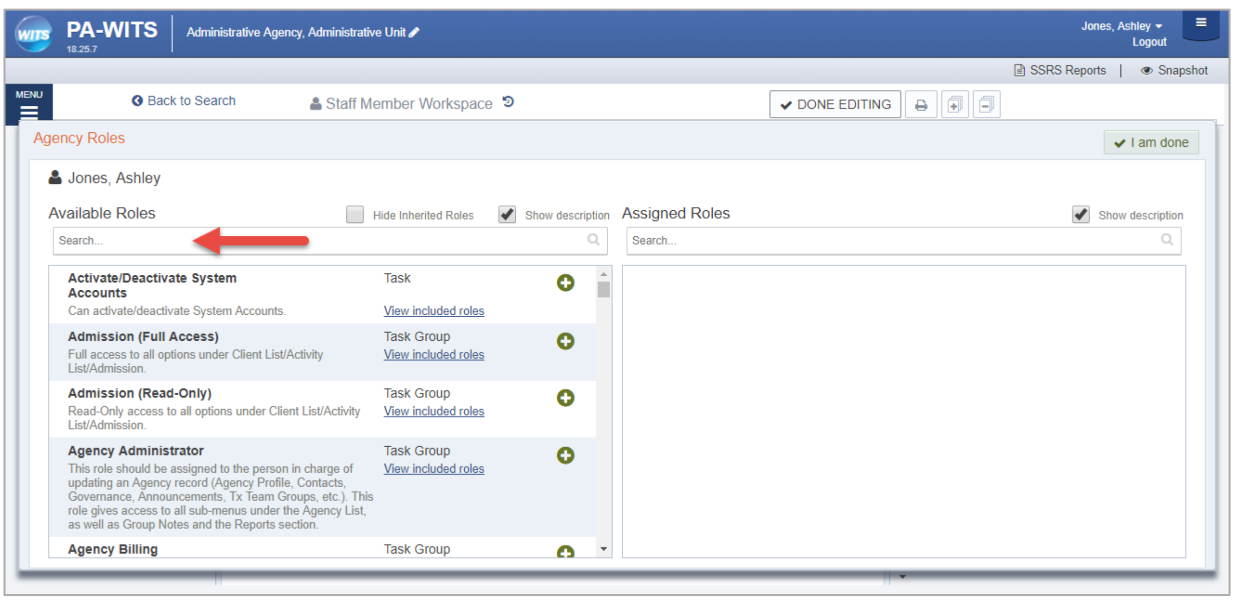


Figure 2-9: Manage Roles Screen

17. Use the **Search** bar to type the name of a role, or scroll through the list to find the correct role(s).



18. To add a role, click the green plus sign. To remove a role, click the red minus sign.

19. When finished assigning roles, click **I am done.**

Add Facility Assignment

The Facility Assignments section allows you to assign one or more facilities for the staff member.

20. Point to the Additional items section, and then click **Add Facility Assignment**.

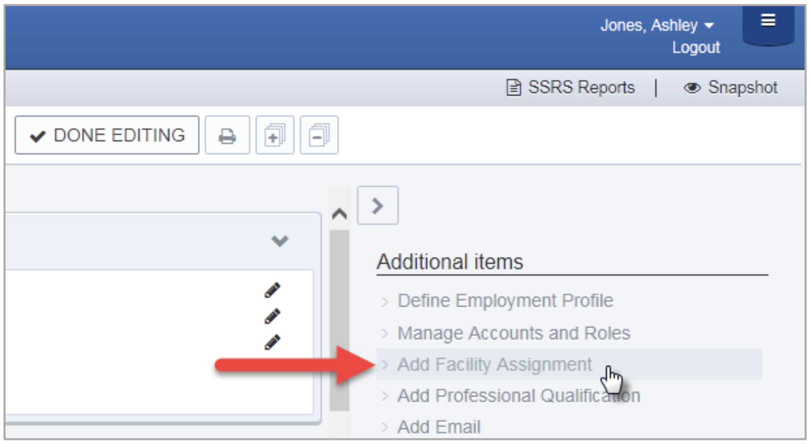


Figure 2-10: Additional Items section, Add Facility Assignment

21. In the Facility Assignments section, click on the applicable facilities.

22. Select the **Effective Date**.

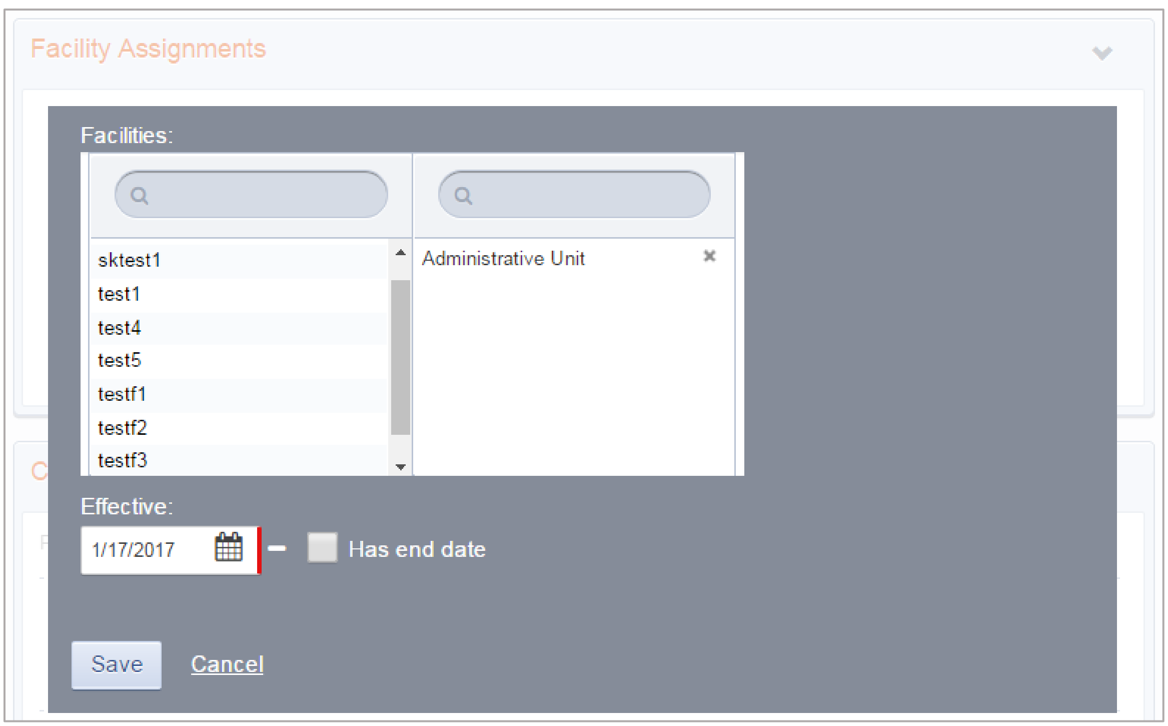


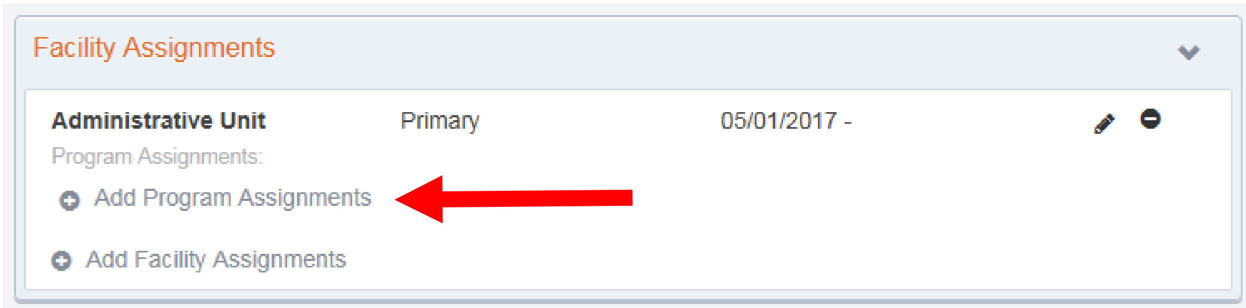
Figure 2-11: Facility Assignments panel

23. Click **Save**.

Add Program Assignment

The Program Assignment option under Facility Assignments will allow a staff member to provide services to clients in that program. A staff member can be assigned to multiple programs, and program assignments must be made under each facility the staff member is assigned to.

24. Click **Add Program Assignments.**

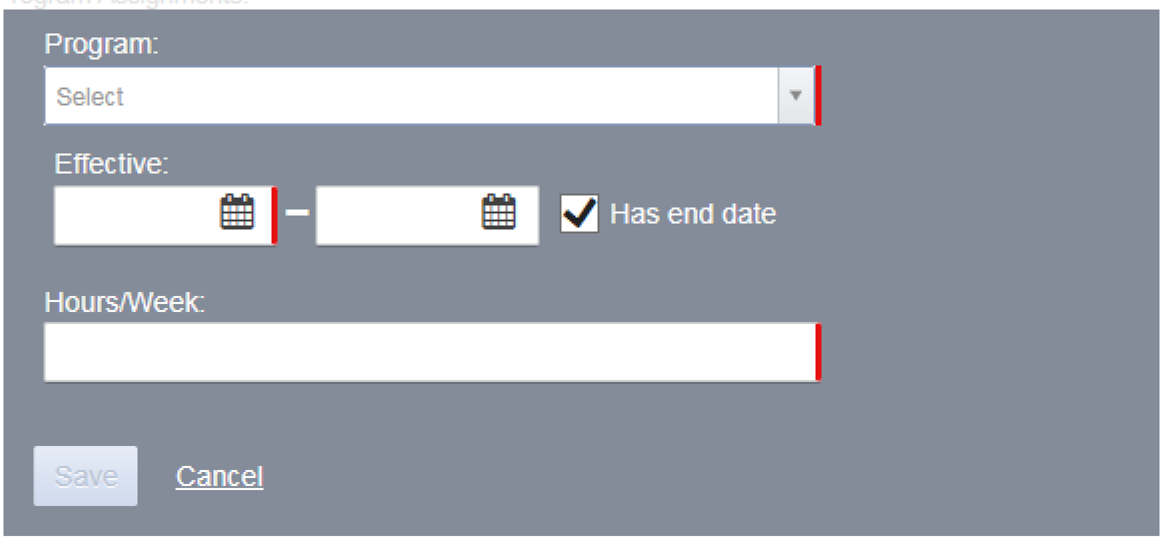


25. Select a **Program** that the staff member should be assigned to

26. Enter the **Effective** date of the program assignment

27. Enter the number of **Hours/Week** the staff member will be assigned to that program.

28. Click **Save.**

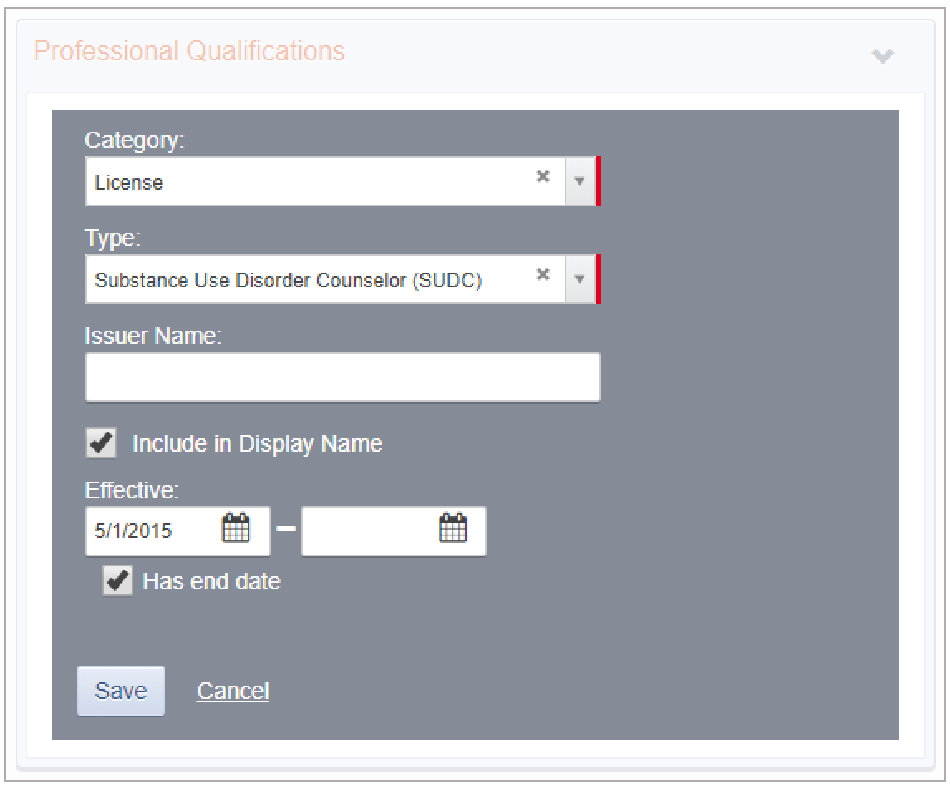


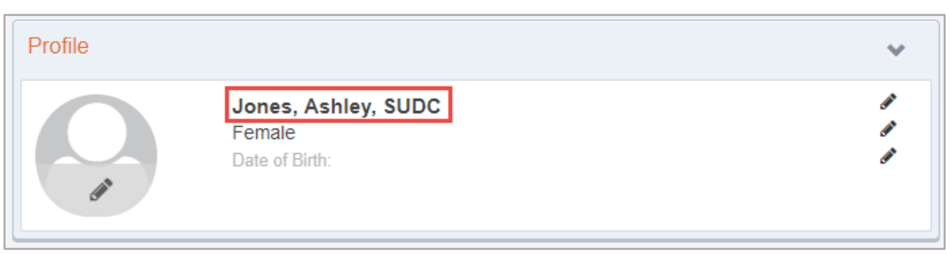
Adding additional items to a profile

The remaining items under the **Additional items** section allow the user to customize the staff member's profile with relevant data.

Account Rules/Other Functionality

- **End Date**: Importance of End date – This field drives a few things on screen; when someone has an end date, they will no longer appear in certain drop down boxes throughout the system.
- **Display Credentials**: When the "Include in Display Name" box is checked, the staff member's credentials will be displayed when they sign a note. This box can be found on different panels in the staff member profile.
- **Professional Qualifications**: In the Professional Qualifications panel, the staff member's licenses, degrees, and certificate information can be recorded. This information can also be included in the staff member's display name.





- **Supervisor**: Clinical Dashboard uses this feature.
- **Clinical Supervisor**: Staff members with clinical roles and with the Staff Member Type "Clinical Supervisor" will have an additional link in the Actions column on the Clinical Dashboard screen. This additional link allows those users to **Provide Feedback**.

  [Staff Administrator] On the Employment Profile panel, in the Staff Member Type field, select "Clinical Supervisor".

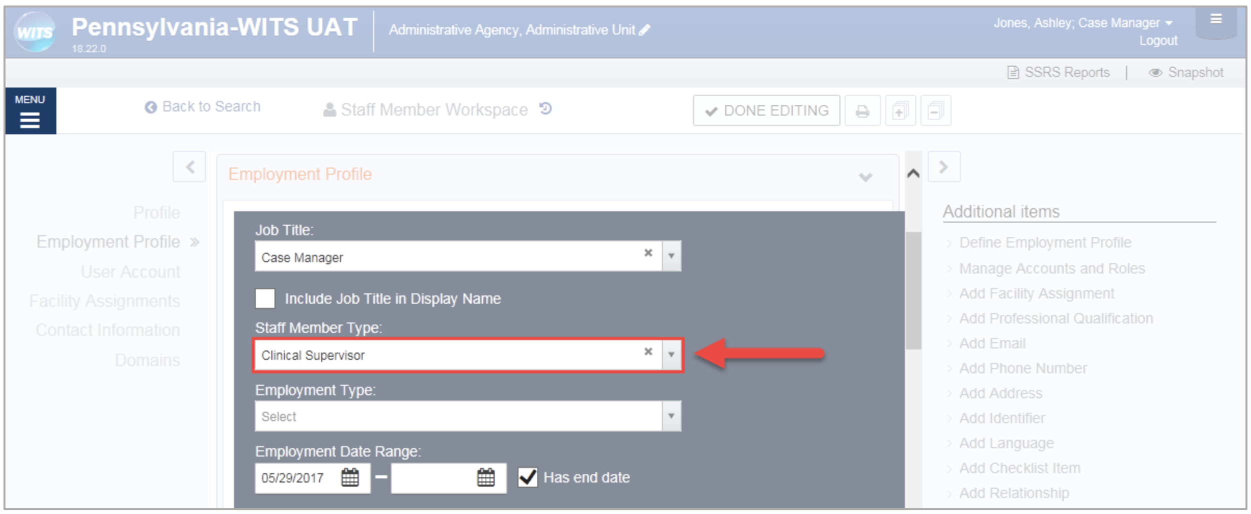
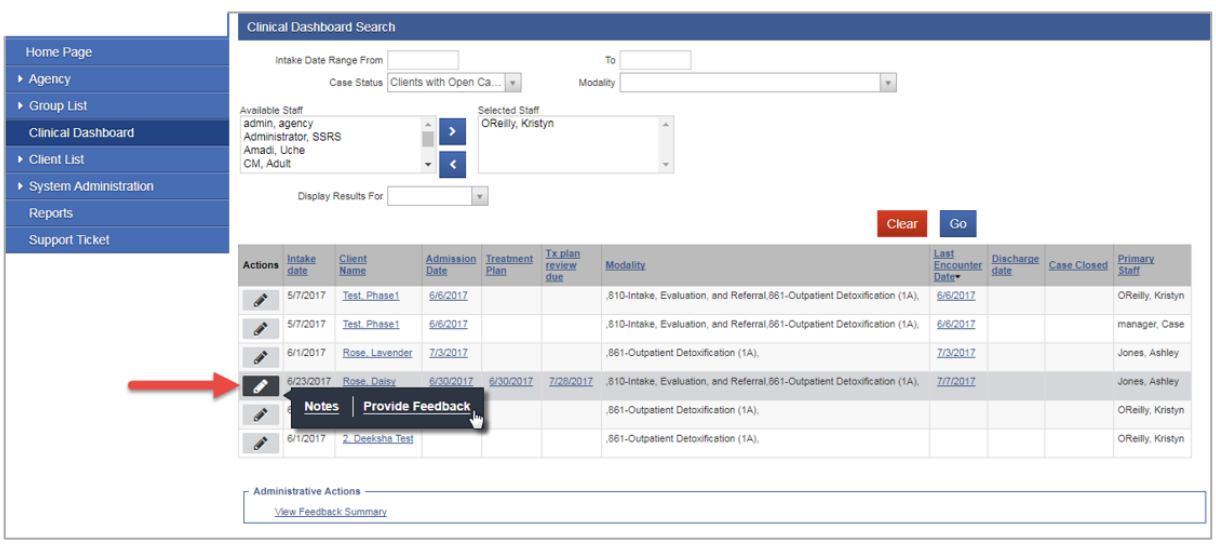


Figure 2-12: Staff Member Profile, Employment Profile panel, Staff Member Type field

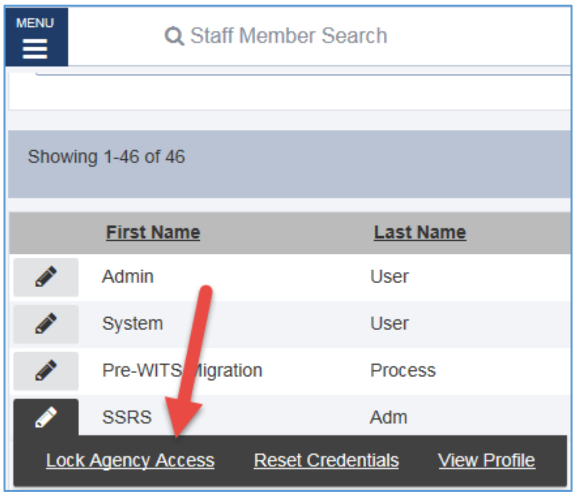
[Clinical Supervisors] Hover over the Actions column, and click **Provide Feedback**.
Figure 1 12: Clinical Dashboard screen, Provide Feedback link



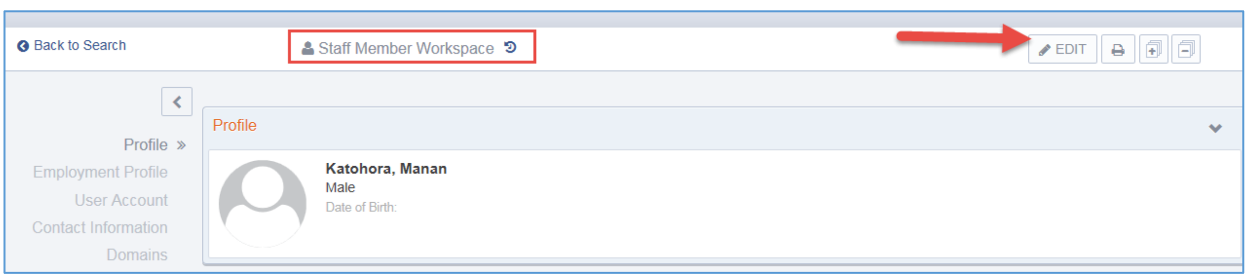
Locking Staff Member Access

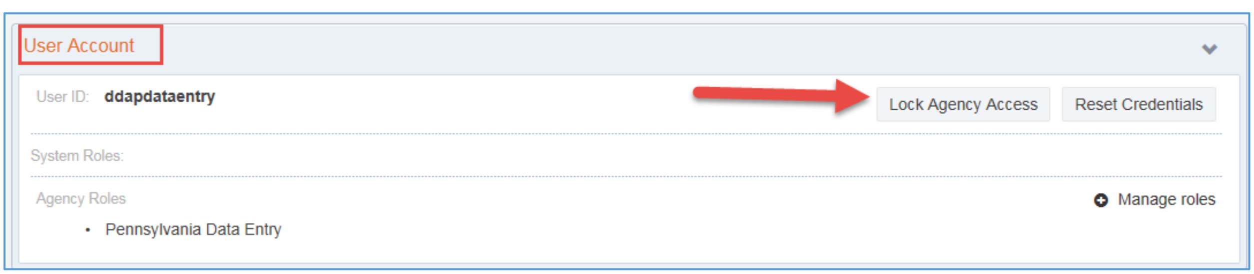
When a user's access to the system needs to be taken away for any reason, the Staff Administrator can "Lock" a user account. The Staff Administrator can reach the **Lock Agency Access** action in 2 ways.

1. From the Staff Member Search Screen, you can select the **Lock Agency Access** action from the list screen for the staff person you wish to lock.



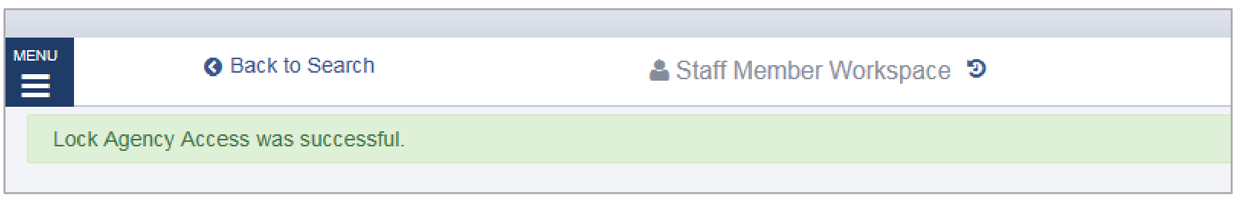
2. From within a Staff Member Workspace, the Staff Administrator can **Edit** the workspace and use the User Account panel to select the **Lock Agency Access** action**.**





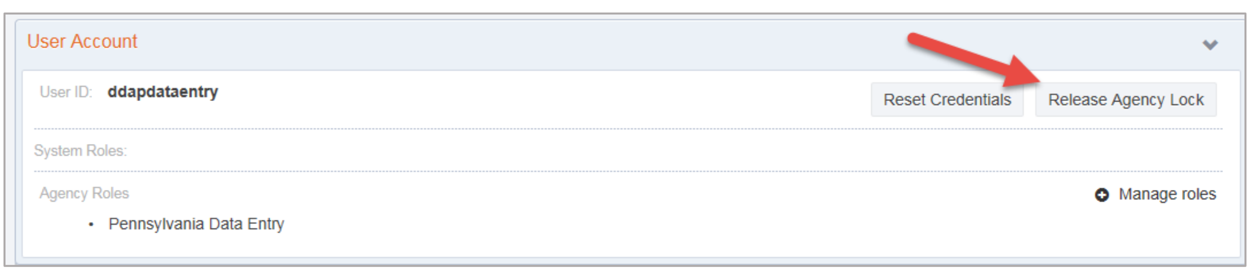
3. When you select **Lock Agency Access** action you are required to enter a Lock Reason. Enter a reason and click Lock.

4. When you click **Lock,** the user will get Lock Agency Access was successful message at the top of the workspace.



5. This staff member can no longer gain access to PA-WITS.

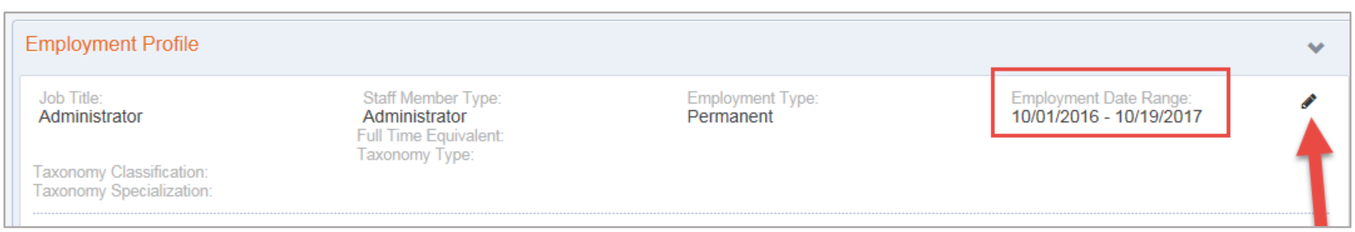
6. If for some reason, you want to release this lock, a Staff Administrator can get to the Release Agency Lock from the Staff Member Search screen or use the Staff Member Workspace User Account panel to **Release Agency Lock**.



7. Release Lock window displays the Lock Reason that was entered in red, Staff Administrator can select the **Release Lock** action.

8. When you click **Release Lock,** the user will get Release Agency Lock was successful message at the top of the workspace.

NOTE **End Date**: When a staff person is no longer working for an agency, a Staff Administrator can go to the Staff Member Workspace and edit the Employment Profile panel and enter and End Date for the Employment Date Range. Entering an End Date, will remove that person's name from appearing in drop down values 30 days after the End Date entered.



Part 2: DDAP Workflow Suggested Role Assignments

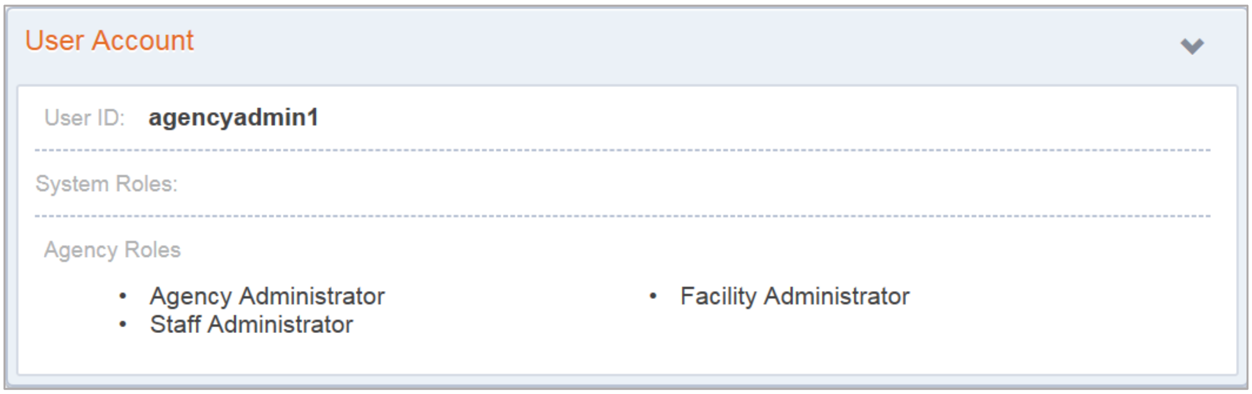
Roles in WITS are designed so an Agency or Staff Administrator can give a user as much, or as little, access to the system as necessary for the user to perform their jobs. Roles can be granted and then later removed as jobs change or as staff "cover" for other staff members. Below are some of the identified roles categorized by the type of Agency and tasks performed at those agencies.

Agency Admin Users

Agency Administration	
Individual Tasks	**Individual Roles**
Update Agency Profile Information	Agency Administration
Creates/Updates New Facilities	Facility Administration
Creates/Updates New Programs	Program Set Up
Creates/Manages Agency Staff	Staff Administrator
Manages Staff Accounts	Staff Management (Full Access)
Runs Canned SSRS Reports	SSRS Reader
Assign staff to Tx Team Groups	Manage Tx Team Groups
Builds SSRS Report	SSRS User
Runs agency in application reports	Agency Reporting
Providers Help Desk Support	Support Ticket
Manages/Monitors Waitlist	Cross Agency Waitlist
Accepts/Intakes New Clients	Referrals (Full Access)
Resets Credentials or Locked Staff Account	Staff Administrator
Updates/Monitors Case Status	Reopen Case
Create Waitlist Clients	Cross Agency Waitlist
Manages staff case load	Clinical Dashboard Oversight
Manages Treatment Encounters	Encounter (Delete)
Manages Case Management Notes	Notes (Delete)
Manages Agency Consent Records	Consent (Delete)
Manages Agency Client Case Records	Record Management
Can end IP system session	End IP System Session

Treatment Agency Administrator

A basic Agency Administrator User Account could be set up with the roles **Agency Administrator**, **Facility Administrator**, and **Staff Administrator**. With these roles, a user would be able to complete additional agency and facility set up, and create staff members.
For larger agencies that have many facilities, the Agency Administrator may want to create additional users to help "manage" each Facility. The **Facility Administrator** role and **Staff Administrator** role could be created to allow the user to manage their facility and create their own staff members.



The following set up assumes an Agency will use Treatment Team Groups to manage user's access to clients. FEi recommends that Treatment Team Groups be set up by an Administrator.

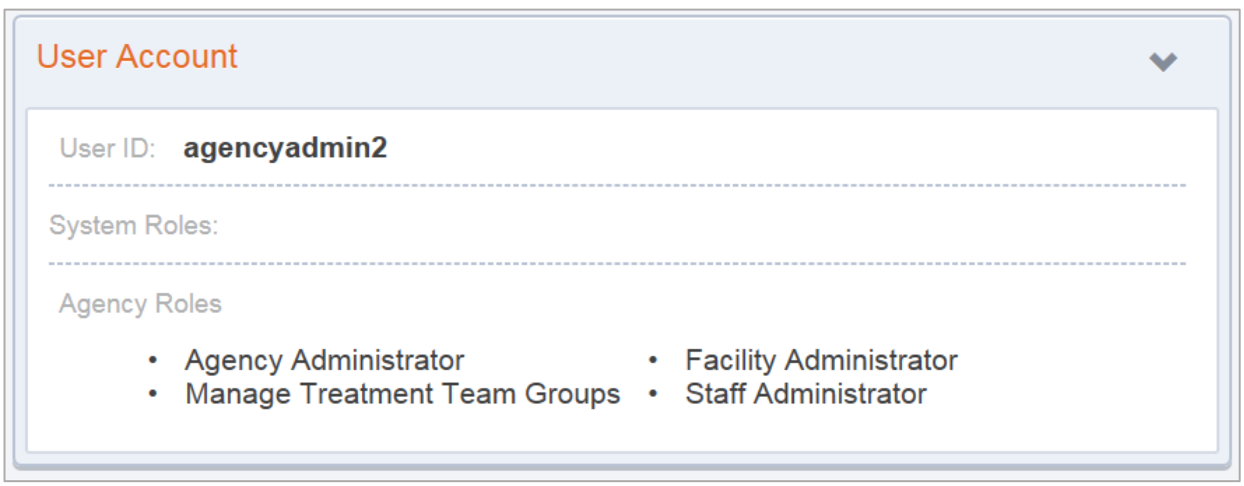


Table 2-1: Administrative Roles

Role Name	Description
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.
Facility Administrator	This role should be assigned to the person in charge of setting up and updating facilities within the Agency (Facility Profile, Contacts, Operating Hours, Programs, etc.). This role gives access to all sub-menus under the Agency/Facility List, as well as Group Notes and the Reports section.
Staff Administrator	This role should be assigned to the person in charge of administering staff within an agency. In order to create new staff records, and / or modify system access of existing ones. This role gives access to all of the staff within an agency and all of the sub-menus under the Agency/Staff List menu.
Manage Treatment Team Groups	This role gives the user access to the Tx Team Groups Menu item under Agency. It allows the user to create treatment team groups and add staff members to them.

Clinical Users

Treatment agencies will have two choices to determine who can see client records, and that accessibility is determined by two different roles that can be assigned to a staff member. The first role is **Clinical (Full)**. With this role, the staff member will be able to access the records of any client within the agency's records. This happens because the Clinical (Full) role inherits the role of "**Non-Treatment Team Access,**" which allows staff to see all the clients in the agency without using Treatment Team functionality.

In addition to the Clinical (Full) role, staff will also need to be assigned the role of **Client Diagnosis** to be able to enter diagnoses in PA WITS.

Clinical (Full) Inherited Roles	
Individual Tasks	**Individual Roles**
Creates the client	Client Profile (Full Access)
Creates Intake	Intake (Full Access)
Creates PA Screener	Screening (Full Access)
Creates Consent	Consent (Full Access)
Reviews Consented Client	View Consented Clients
Create Referral	Referrals (Full Access)
Creates Admission/Program Enrollment	Admission (Full Access)
Creates/Updates Outcome Measure data	Outcome Measures (Full Access)
Determines Client Diagnosis	Client Diagnosis (Read Only)
Creates TAP	Assessment (Full Access)
Creates ASAM	ASAM Profile (Full Access)
Creates PCPC	PCPC Summary Access (Full)
Creates Miscellaneous Notes	Notes (Full Access)
Creates Encounter Notes	TX Encounter (Full Access)
Creates/Updates Case Management Activates	Recovery Plan (Full Access)
Creates Discharges	Discharge (Full Access)
Access any record within agency	Non-Treatment Team Access

Clinical User 2 (Treatment Agency)

Another type of set up for a Clinical End User general User Account could have the **Clinical Full (without Non-Tx Team)** role and the **Client Diagnosis** role to get them through the DDAP workflow. This is more restrictive and this staff must be a member of a client's treatment team in order to see the client record.

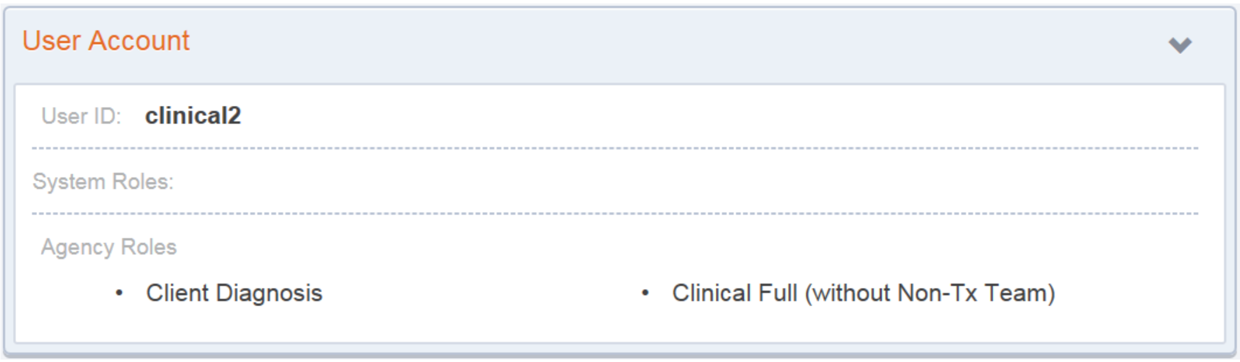


Table 2-2: Treatment Agency – Clinical User Roles

Role Name	Description
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.
Clinical Full (without Non-Tx Team)	Full access to all clinical options under the Client List/Activity list except Non Treatment Team Access.

Intake/Screening Coordinator

In a Screening Only Agency, an Intake/Screening Coordinator User Account would need the following roles to get them through the DDAP workflow. This setup would not require the use of Treatment Teams. It is an easier setup but not restrictive. This user can see all clients with in the agency.

Table 2-3: Intake/Screening Coordinator Roles

Role Name	Description
Client Profile (Full Access)	Full access to all options under Client List/Client Profile.
Consent (Full Access)	Full access to all options under Client List/Activity List/Consent.
Intake (Full Access)	Full access to all options under Client List/Activity List/Intake.
Non-Treatment Team Access	This role allows access to cases without being a member of the client's treatment team. By default, you can only access case records if you are a member of the treatment team.
Referrals (Full Access)	Full access to all options under Client List/Activity list/Referrals.
Screening (Full Access)	Full access to all options under Client List/Activity list/Screening.

Case Manager (Case Management Agency)

In a Case Management Agency, a Case Manager User Account would need the following roles to enter information for the DDAP workflow. This setup would not require the use of Treatment Teams. It is an easier setup but not restrictive. This user can see all clients with in the agency.

User ID: **casemanager1**

System Roles:

Agency Roles

- Admission (Full Access)
- ClientProfile (Full Access)
- Intake (Full Access)
- Non-Treatment Team Access
- Recovery Plan (Full Access)
- Screening (Full Access)
- Assessments (Full Access)
- Consent (Full Access)
- Manage Treatment Team Groups
- Notes (Full Access)
- Referrals (Full Access)

Table 2-4: Case Manager 1 Roles

Role Name	Description
Admission (Full Access)	Full access to all options under Client List/Activity List/Admission.
Assessments (Full Access)	Full access to all options under Client List/Activity List/Assessments.
Client Profile (Full Access)	Full access to all options under Client List/Client Profile.
Consent (Full Access)	Full access to all options under Client List/Activity List/Consent.
Intake (Full Access)	Full access to all options under Client List/Activity List/Intake.
Manage Treatment Team Groups	This role gives the user access to the Tx Team Groups Menu item under Agency. It allows the user to create treatment team groups and add staff members to them.
Non-Treatment Team Access	This role allows access to cases without being a member of the client’s treatment team. By default, you can only access case

Role Name	Description
	records if you are a member of the treatment team.
Notes (Full Access)	Full access to all options under Client List/Activity list/Notes.
Recovery Plan (Full Access)	This role gives access to the Recovery Plan, Checkup and Recovery Plan Review menu items.
Referrals (Full Access)	Full access to all options under Client List/Activity list/Referrals.
Screening (Full Access)	Full access to all options under Client List/Activity list/Screening.

In a Case Management Agency, a Case Manager User Account would need the following roles to enter information for the DDAP workflow. This setup would require the use of Treatment Teams. It is an easier setup but not restrictive. This user can see all clients with in the agency.

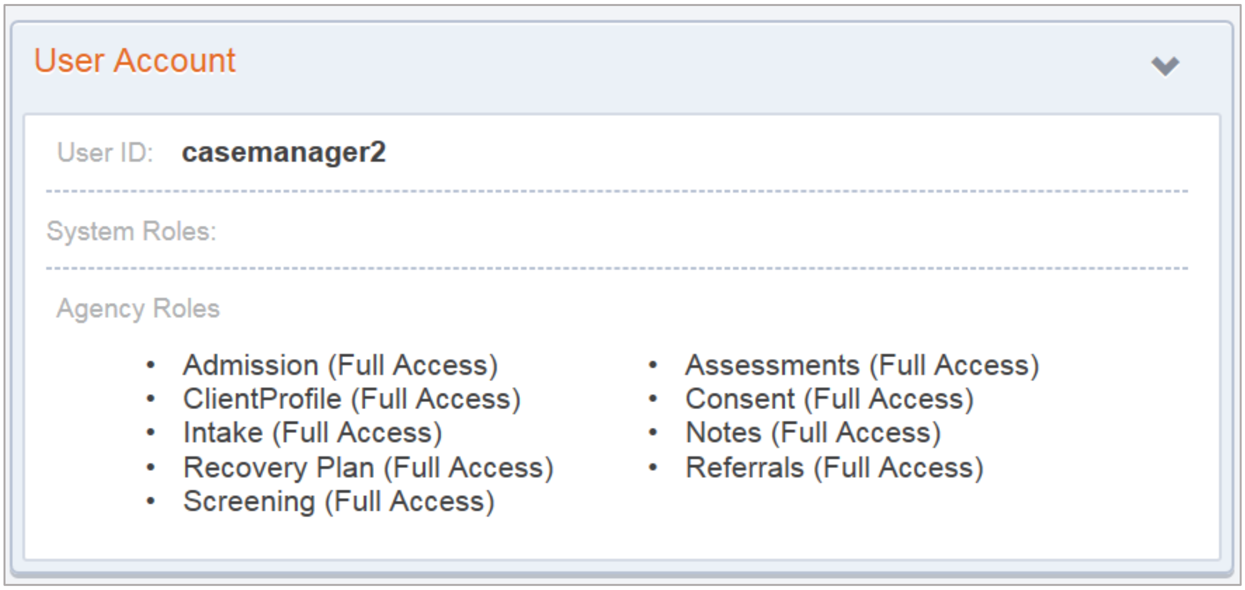


Table 2-5: Case Manager 2 Roles

Role Name	Description
Admission (Full Access)	Full access to all options under Client List/Activity List/Admission.
Assessments (Full Access)	Full access to all options under Client List/Activity List/Assessments.
Client Profile (Full Access)	Full access to all options under Client List/Client Profile.
Consent (Full Access)	Full access to all options under Client List/Activity List/Consent.
Intake (Full Access)	Full access to all options under Client List/Activity List/Intake.
Notes (Full Access)	Full access to all options under Client List/Activity list/Notes.
Recovery Plan (Full Access)	This role gives access to the Recovery Plan, Check up and Recovery Plan Review menu items.
Referrals (Full Access)	Full access to all options under Client List/Activity list/Referrals.

Role Name	Description
Screening (Full Access)	Full access to all options under Client List/Activity list/Screening.

Clinical Supervisor

A Clinical Supervisor Account could have the Clinical Supervisor role and the Clinical Dashboard Oversight role to provide an agency staff member the permission they need to act in a supervisory role. This setup would not require the use of Treatment Teams. It is an easier setup but not restrictive. This user can see all clients with in the agency.

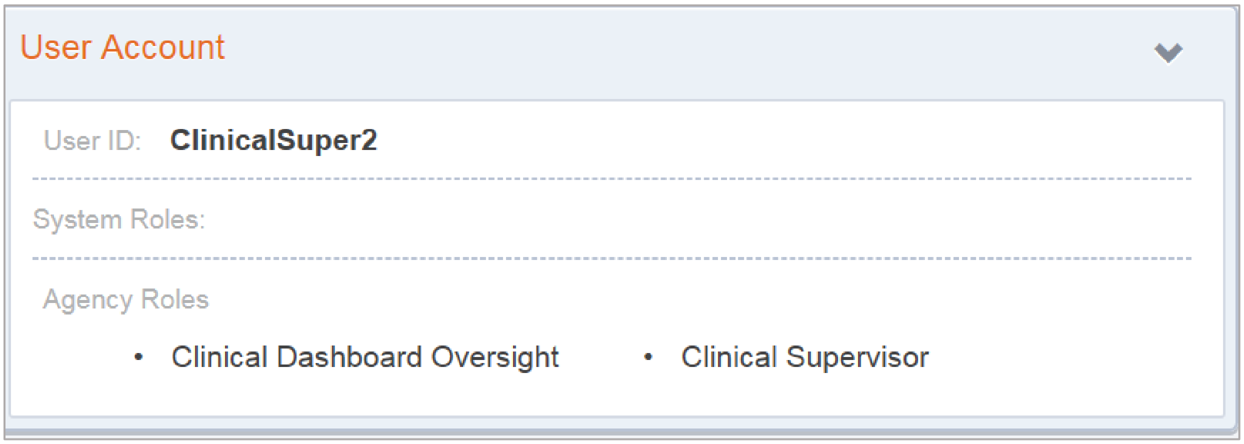


Table 2-6: Clinical Supervisor Roles

Role Name	Description
Clinical Dashboard Oversight	Provide access to query all staff of an agency on the Clinical Dashboard, giving permission to select any staff in the list and allow to see all clients' cases associated with selected staff member(s).
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).

Additional Roles

Table 2-7: Additional Roles

Field	Description
PCPC Summary Access (Full)	This role will provide the user access to the PCPC Summary List and full read/write access to the PCPC Summary Screen.
PCPC Summary Access (Read-Only)	This role will provide the user access to the PCPC Summary List and read only access to the PCPC Summary Screen.
PCPC Delete	This role will provide the user the ability to delete PCPC records from the Summary List.

Clinical (Full Access)/Clinical Full (without Non-Tx Team) are roles that inherit the following roles	
Individual Tasks	
Admission (Full Access)	Notes (Full Access)
Admission (Read-Only)	Notes (Read-Only)
Agency Waitlist (Full Access)	Outcome Measures (Full Access)
Assessments (Full Access)	Outcomes (Full Access)
Assessments (Read-Only)	Outcomes (Read-Only)
Client Payments (Full Access)	Placement (Read-Only)
Client Profile (Full Access)	Recovery Plan (Read Only)
Client Profile (Read-Only)	Referrals (Full Access)
Clinical	Referrals (Read-Only)
Clinical (Read-Only)	Screening (Full Access)
Clinical Full (without Non-Tx Team)	Screening (Read-Only)
Consent (Full Access)	Treatment Plan Full Access
Consent (Read-Only)	TX Encounter (Full Access)
Contact (Full Access)	TX Encounter (Read-Only)
Contact (Read-Only)	TX Medications (Full Access)
Discharge (Full Access)	TX Medications (Read-Only)
Discharge (Read-Only)	TX Plan (Full Access)
Follow-up (Read-Only)	TX Plan (Read-Only)
Intake (Full Access)	View Completion Requirements
Intake (Read-Only)	View Treatment Plan

Part 3: Troubleshooting

Use Cases

- How many login attempts are allowed?
- Your account is already in use.
- You have exceeded the maximum number of log-in attempts.
- Your reset credentials link has expired
- Correcting User ID

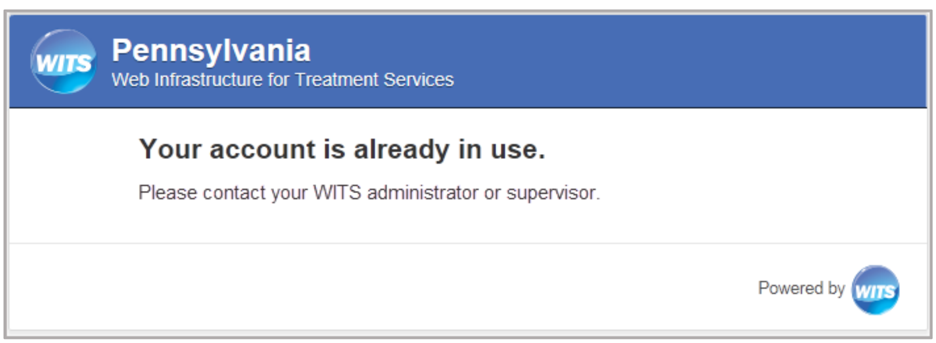
Enable – try logging in again

Reset credentials – get a new link to set up new credentials

How many login attempts are allowed?

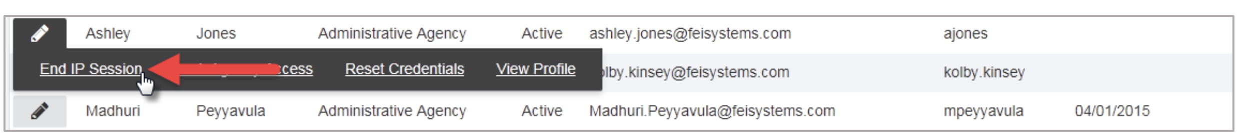
Each user has **three** (**3**) attempts to log in with their correct password and pin.

Your Account is Already in Use



Solution: End IP System Session

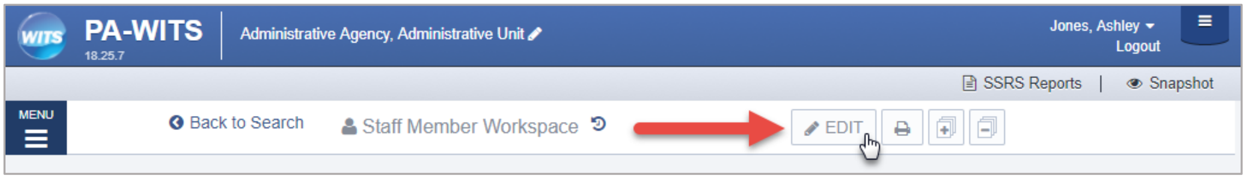
1. On the **Staff Members** list, locate the staff member, hover over the pencil icon, and then click **End IP Session**.



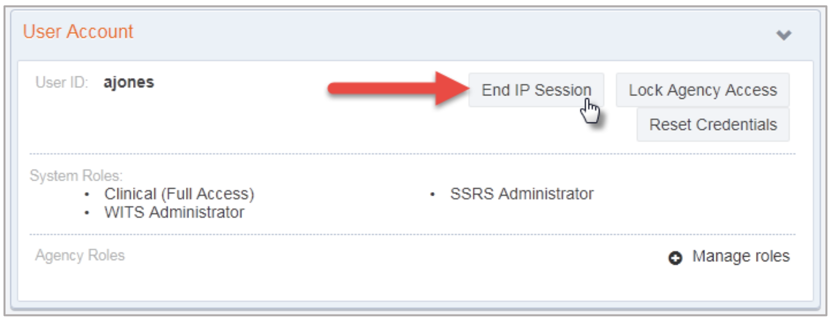
Or (other option)

1. On the **Staff Members** list, locate the staff member, hover over the pencil icon, and then click **View Profile**.

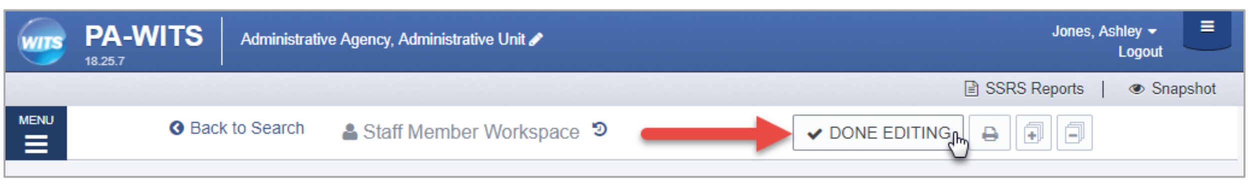
2. Click **Edit**.



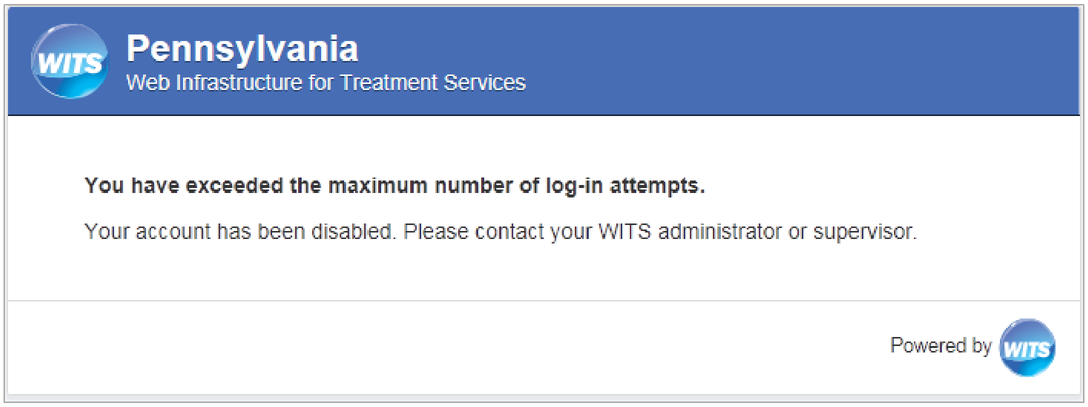
3. In the User Account panel, click End IP Session.



4. Click Done Editing.

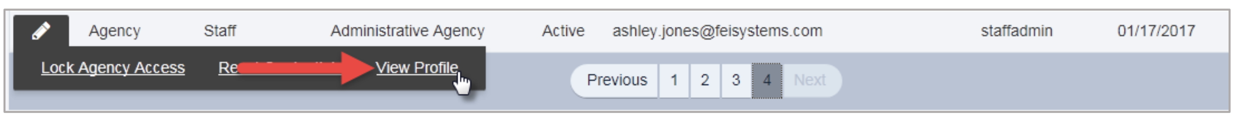


You Have Exceeded the Maximum Number of Log-in Attempts

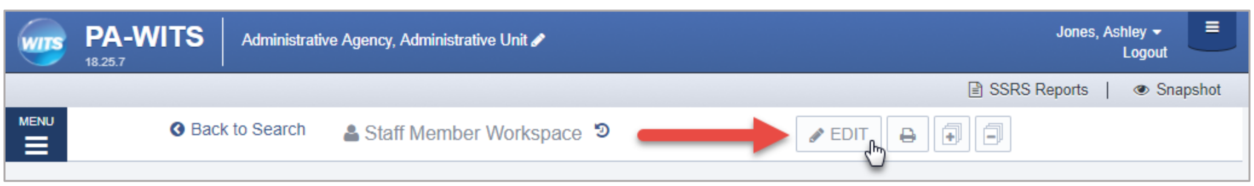


Solution: Enable account

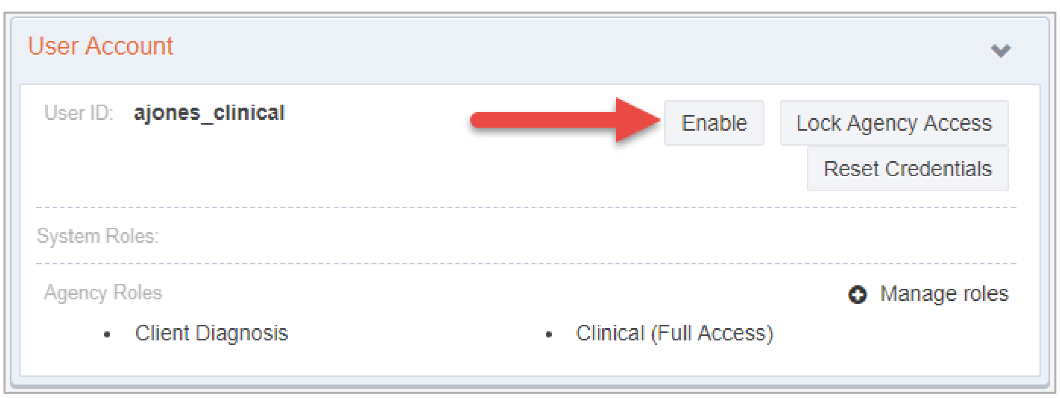
1. On the **Staff Members** list, locate the staff member, hover over the pencil icon, and then click **View Profile**.



2. Click **Edit**.



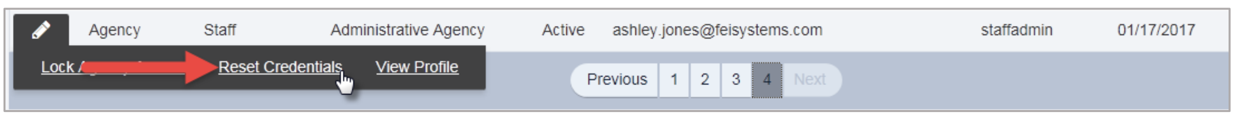
3. In the User Account panel, click **Enable**.



Your Reset Credentials Link Has Expired

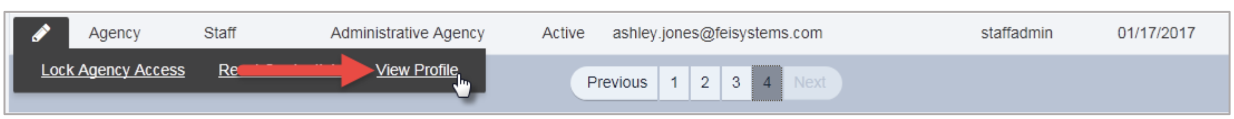
Solution: Reset Credentials

1. On the **Staff Members** list, locate the staff member, hover over the pencil icon, and then click **Reset Credentials**.

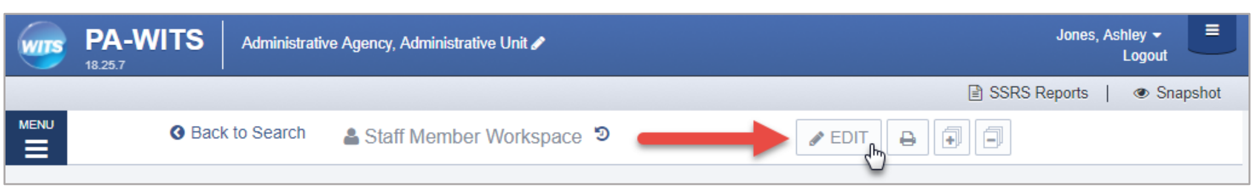


Or (other option)

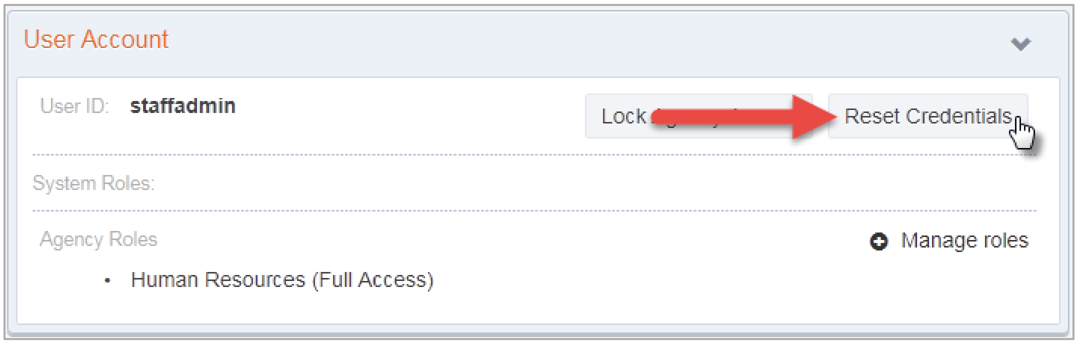
1. On the **Staff Members** list, locate the staff member, hover over the pencil icon, and then click **View Profile**.



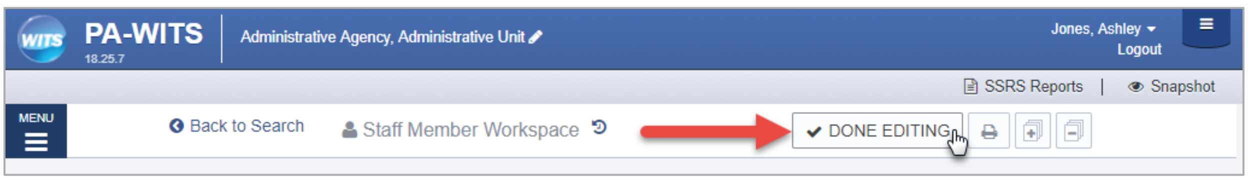
2. Click **Edit**.



3. In the **User Account** panel, click **Reset Credentials**. The staff member will then receive an email containing a link to reset their credentials. **Please note this link will remain active for 24 hours.** If the staff member is unable to reset their credentials within that timeframe, they will need their credentials reset again.



4. Click Done Editing.



Correcting User ID

Note: to perform this correction, this System Account role is needed: **Can Associate/Dissociate Agency Account**

If a staff member was assigned an incorrect User ID, or needs to update their current User ID, this action can be performed by dissociating the current User ID and then associating a new User ID with the staff member's account.