State Opioid Response (SOR) Grant

Standard SOR Administrator User Guide

Applies to:

WITS Version 19.6.0

WITS Customers

Last Updated August 19,2019

Version 2

WITS Customers

State Opioid Response (SOR) Grant

Preface

"The State Opioid Response (SOR) program aims to address the opioid crisis by increasing access to medication-assisted treatment using the three FDA-approved medications for the treatment of opioid use disorder, reducing unmet treatment need, and reducing opioid overdose related deaths through the provision of prevention, treatment and recovery activities for opioid use disorder (OUD) (including prescription opioids, heroin and illicit fentanyl and fentanyl analogs)."[1]

Intended Audience

This Standard SOR user guide has been prepared for provider agency staff members delivering SOR services to individuals. Information included will assist providers in understanding the standard WITS SOR system and the data entry requirements for the SOR grant.

Note: Screen captures, and other information included in this Standard SOR user guide may differ based on the settings established for your Training and/or Production site(s).

System Requirements

WITS is a web-based application accessed through an Internet (web) browser using an Internet connection.

Internet Browsers

WITS is compatible with up-to-date versions of most modern Internet browsers such as:

- Apple® Safari®
- Google Chrome™
- Mozilla® Firefox®
- Windows Internet Explorer 10 or newer *(recommended)*

Note: Do not allow your Internet browser to save your password, as this information will be routinely updated.

Pop-up Blocker

Certain features in WITS, such as Snapshot and Scheduler, will open in a separate browser window when selected. Make sure your browser allows pop-ups from WITS.

Customer URL Links

Training Site: https://pa-training.witsweb.org

Production Site: https://pa.witsweb.org

The **Training Site** allows staff members to practice using the system before entering actual data in the Production Site. ***Do not enter real client information in the training site***.

[1] Source: https://www.samhsa.gov/grants/grant-announcements/ti-18-015

Contents

Note: Notes contain information for users to take note of, as the information may affect what the user does with the system.

Tip: Tips contain information helpful to the user, such as providing an easier way to do something.

Important: Typically, these highlight details for the user to consider or review before continuing with a step or action within the system. This information may warn the user about possible error messages that may occur if the instructions are not followed, or it may indicate/remind users of additional actions to take before proceeding, such as downloading required software.

Part 1: State Opioid Response (SOR) in WITS

Standard SOR Process Workflow Diagram

The following diagram illustrates the standard SOR workflow process; however, workflow processes may differ based on individual implementations.

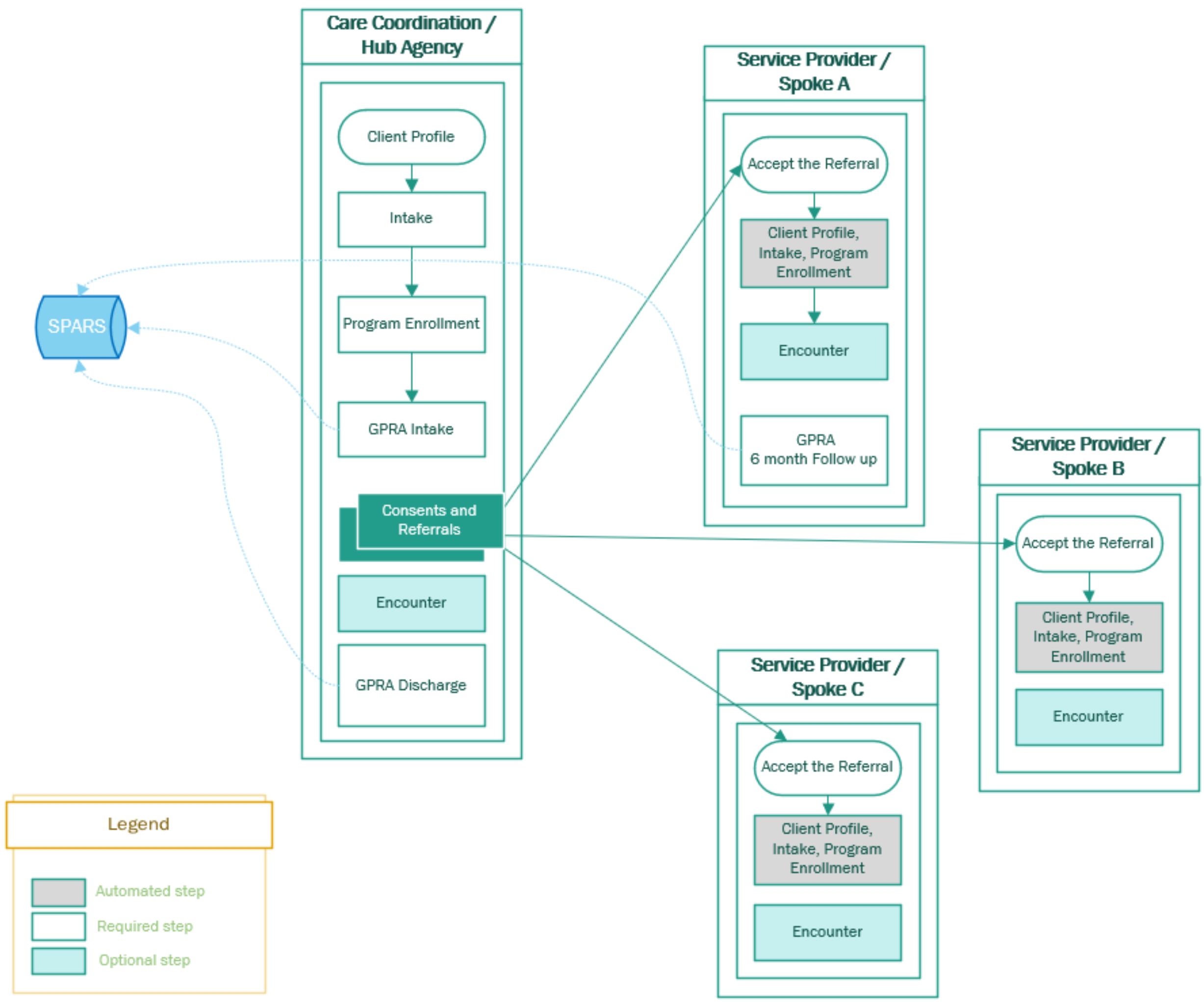


Figure 1-1: Standard SOR Workflow Diagram

WITS Structure Definitions

1. **Agency:** The legal entity that a provider operates within. Some people refer to this as 'Provider'.

2. **Facility:** The physical location (building) that an Agency/Provider uses to provide services. A provider can have more than one facility within a single building.

3. **Program:** The defined plan of treatment or grouping of services for a given set of individuals, equated with a modality and/or level of care. (e.g., MAT or Intensive Outpatient or Prevention).

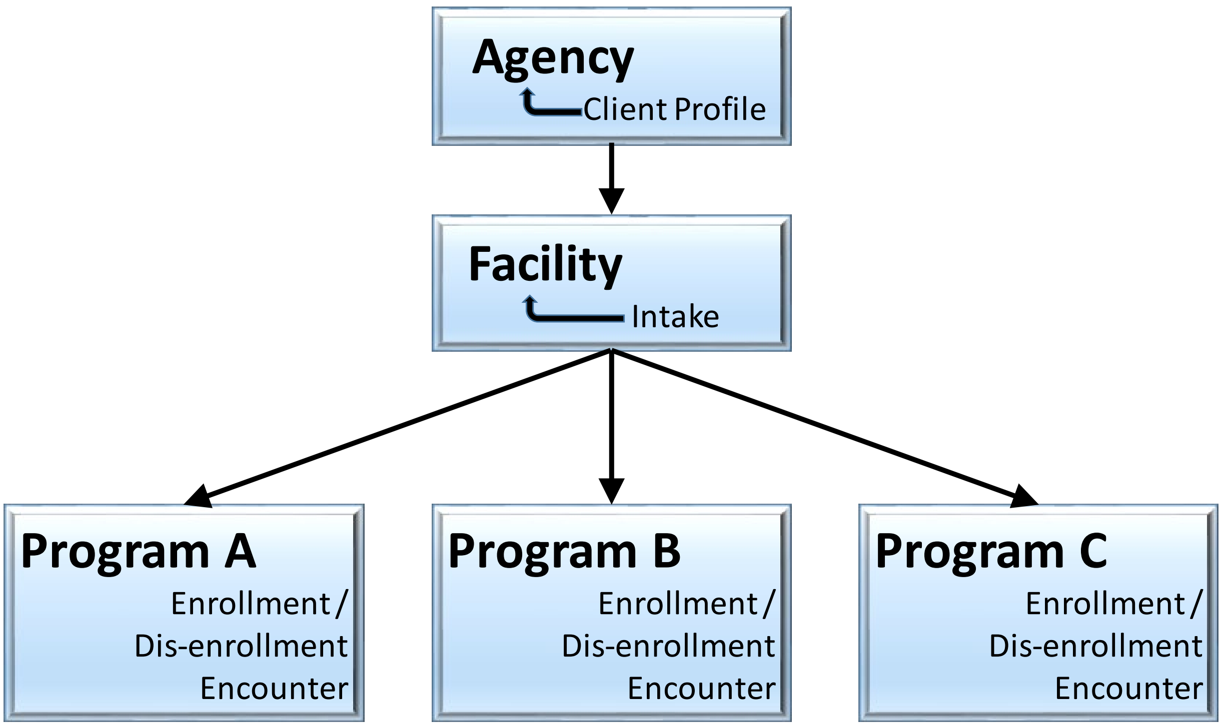


Figure 1-2: WITS Structure Overview

Grant Episode Concepts

Where:* *Agency* > *Agency List* > *Facility List* > *Programs

Background

When a client's GPRA interviews are completed, they are sent to SPARS. Each type of GPRA Interview (Intake, 6-Month follow up, Discharge) is sent automatically as an upload from WITS. If the same type of GPRA is sent twice for the same UCN (for example, if two GPRA Intakes are completed), SPARS will inactivate the first GPRA Intake interview when the second is completed. In order to prevent older interviews being inactivated in error, WITS now has a grant episode.

Grant Episode Concepts

Table 1-1: Grant Episode Events and Information

Event	Information
GPRA Menu Item	The ability to enter a GPRA in WITS only becomes available when a WITS client program enrollment (CPE) exists where the associated program has a value in the Grant field and the end user has the GPRA (Full Access) security access role.
Grant Episode	This allows the client to be referred to other agencies and have the same grant episode. If Agency A completes the GPRA Intake and then refers the client to Agency B, Agency B will be able to continue the grant episode and complete the GPRA 6-Month Follow Up and GPRA Discharge interviews for the same client. This will prevent another agency from inadvertently inactivating the previous GPRA Intake because the grant episode will remain assigned to this client in other agencies. 1. The Grant Episode is created and put into a 'Pending' status when the Client Program Enrollment (CPE) is created for a program with a Grant field value. 2. The Grant Episode follows the client's UCN throughout the process of creating GPRAs. 3. The 'Pending' grant episode will become 'Active' once the GPRA Intake interview is completed. 4. It will remain active through the 6-Month Follow-Up and Discharge interviews. 5. Once all 3 interviews are completed, the Grant Episode will have a status of 'Closed.' 6. Once the Grant Episode is 'Closed', a new 'Pending' Grant Episode can then be created if the client needs treatment again. 7. The WITS Administrator could change the Grant Episode from 'Active' to 'Inactive' (this can be done upon creation of a client program enrollment within a different agency)

Use Case: Client with GPRA intake at one provider goes to another provider without a WITS consent/referral

If the client goes to another provider who attempts to add a Client Program Enrollment in SOR and that client/UCN already has an 'active' grant episode, the system will prohibit this. The provider/user will be presented with a WITS error message to contact the System Administrator. (Note: System Administrator refers to the SCA Administrator)

The SCA Administrator would then be able to determine if the client program enrollment can be added within the agency by either continuing the existing episode by having the GPRA information consented and a referral made to the new agency or creating a new episode (which will inactivate the previous episode).

- If the SCA Administrator does not know which agency the client originally started with, they can contact the PA WITS Help Desk to request that information. After obtaining the original agency, the SCA will need to coordinate the client's enrollments with the involved agencies.
- If the client should not have been enrolled in a SOR program, for example, if they are not a SOR funded client, then the SCA Administrator can contact the PA WITS Help Desk to have the grant episode inactivated.

Part 2: Agency Administration

Agency Profile

***Where:* Agency > Agency List > Agency Profile**

WITS Administrators are responsible for adding new Agency records to the system. When creating an agency, only the Agency Profile and Address are required to save the agency record. Additional agency information can be added and updated later as needed. WITS Administrators can also designate other staff members to assist with other agency-level responsibilities.

To create a new agency record, follow the steps below.

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

2. Click the **Add New Agency Record** link.

Figure 2-1: Agency List screen

3. On the **Agency Profile** screen, enter the information as shown in the table below.

Table 2-1. Agency Profile Fields

Field Name	Description
Agency Name	Type the agency's name.
Display Name	The agency's display name will appear in drop-down menus throughout the system and should be meaningful to all staff members; this field will automatically copy the first 15 characters from the "Agency Name" field but this information can be edited. **Note**: There is a 15-character limit for this field.
Agency Type	Select from the drop-down menu.
Contract Role	Select "Provider".
County	Select from the drop-down menu.
Domains	For SOR, select the Substance Abuse domain.

Note: Typically, the agency named "Administrative" is reserved to house staff from FEI who support the State's WITS instance (e.g. FEI Production Support, FEI Account Manager). State staff will be listed in the State named agency.

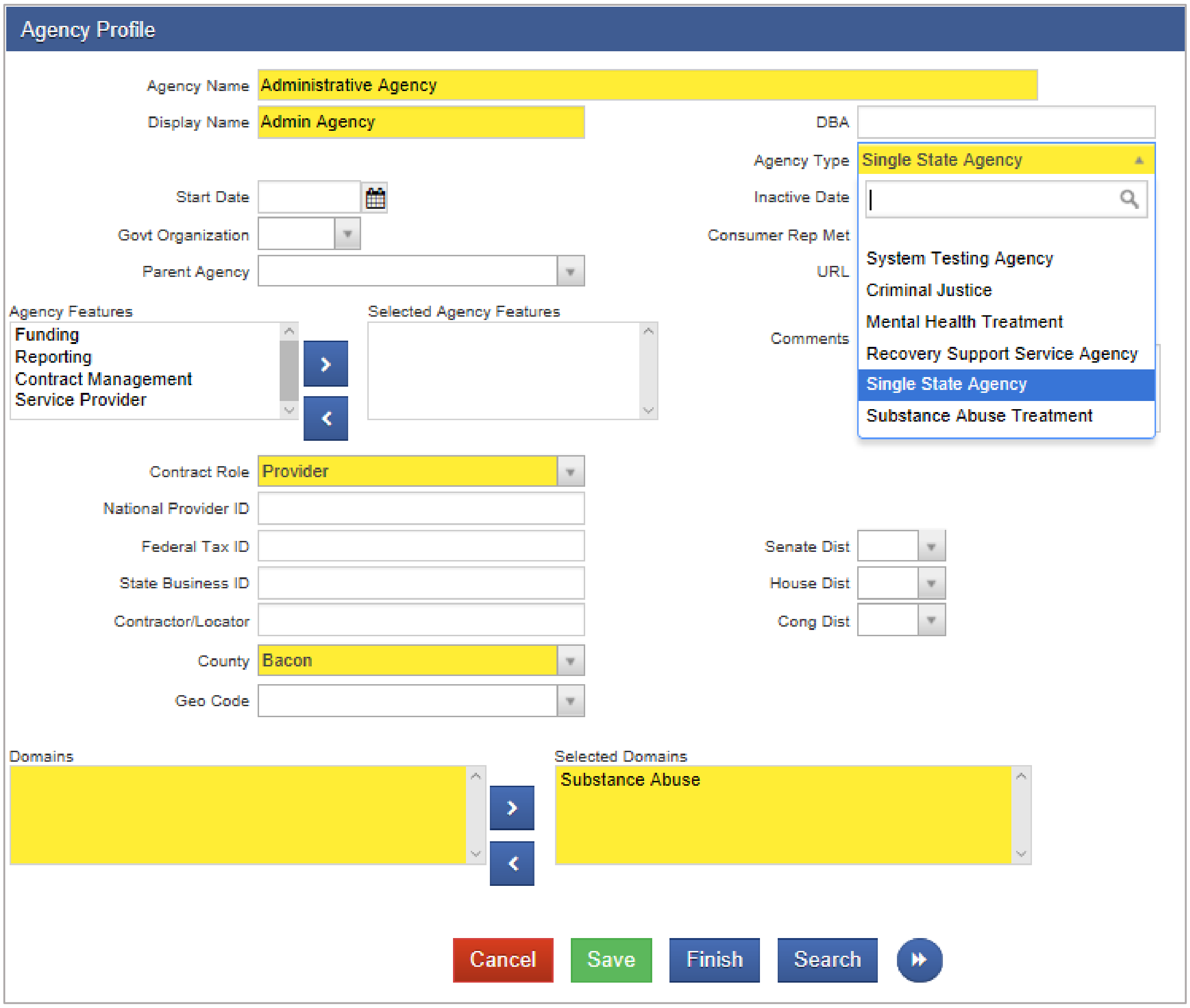


Figure 2-2: Agency Profile screen

4. When complete, click the **right-arrow button**.

5. Click the **Add Address** link.

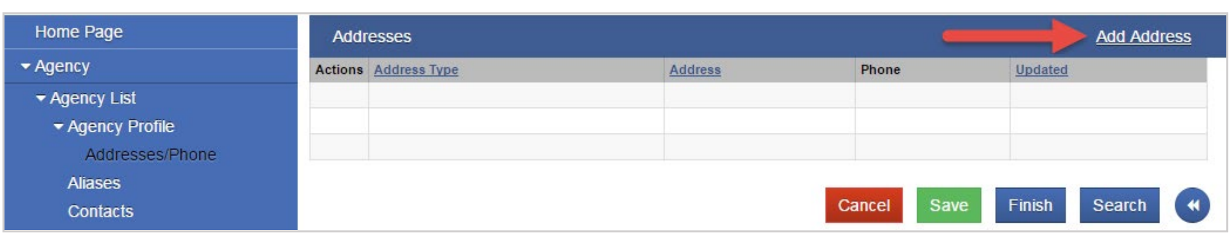


Figure 2-3: Address/Phone List screen

6. On the **Address Information** screen, enter the required information.

Table 2-2: Address Information Fields

Field	Description
Address Type	Select from the drop-down menu.

Field	Description
Confidential	This field defaults to "No"; update if applicable.
Address Line 1	Type the first address line.
Address Line 2	Type the second address line, if applicable.
City	Type the city name.
State	Select state from the drop-down menu.
Zip	Type the zip code.

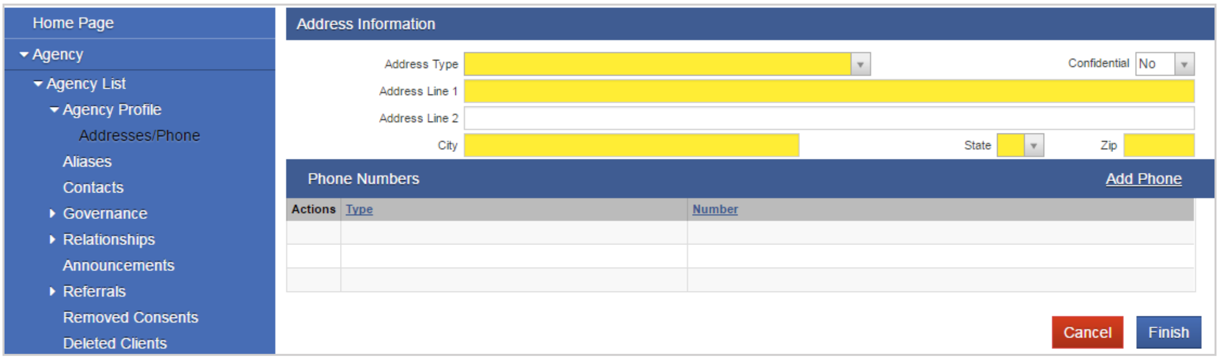


Figure 2-4: Address Information screen

7. If available, add a telephone number by clicking the **Add Phone** link. Then click **Finish**.

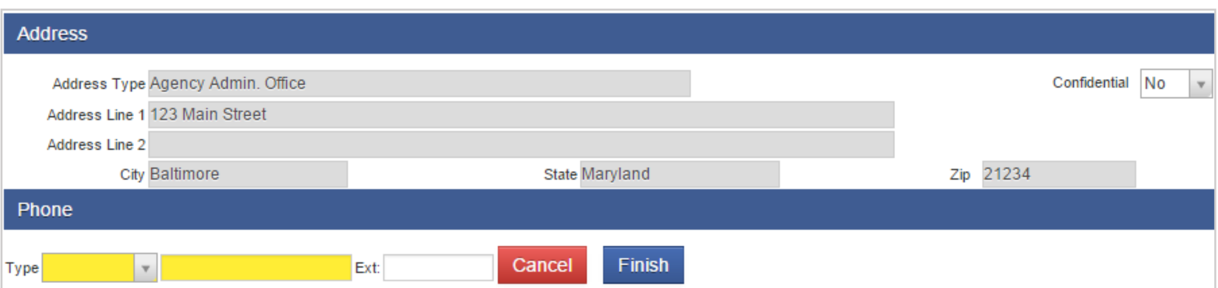


Figure 2-5: Add Phone Number

8. The new address will appear on the Addresses screen. Click **Save** and then click **Finish**.

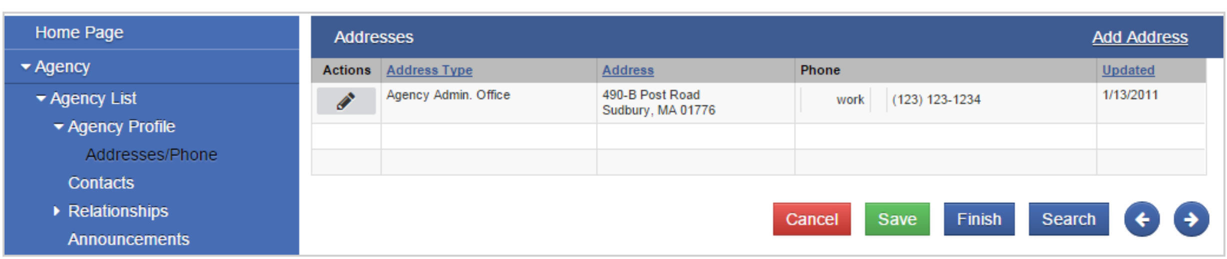


Figure 2-6: Address/Phone screen

9. On the **Agency Profile** screen, click **Save** and then click **Finish**.

Agency Disclosure (Optional)

***Where:* Agency > Agency List > Relationships > Disclosure**

WITS allows client information to be consented or "shared electronically" within the system. This is accomplished through creating a consent record for individual clients, so that when a client is referred to another agency, information listed within the consent record will be shared with that other agency. It can be very repetitive for staff members to create these consent records on a client-by-client basis. To help staff members create consistent consent records, each Agency should set up its own Agency Disclosure. This establishes a template for Consent. A global disclosure policy can be created for all agencies, or a separate disclosure agreement can be created for each agency. For more information about WITS and 42CFR Part 2 compliance, see the Consents section in the End User documentation.

1. On the left menu, click **Agency**, then click **Relationships**, and then click **Disclosure**.
2. Click **Add Agency Disclosure Domain Record**.

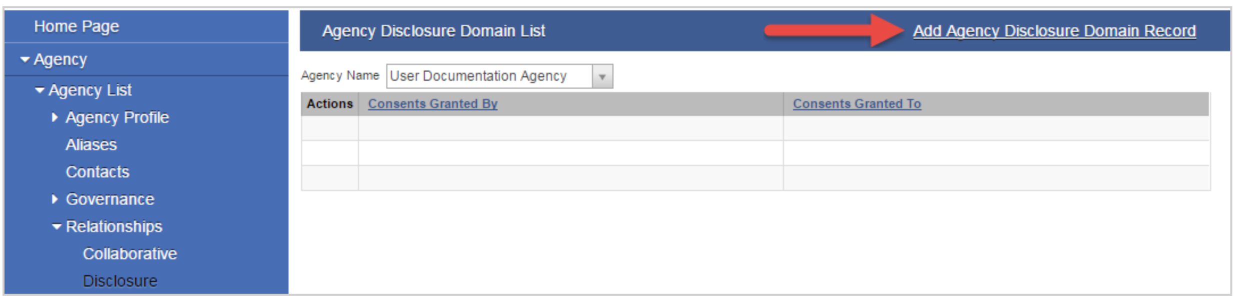


Figure 2-7: Agency Disclosure Domain List screen

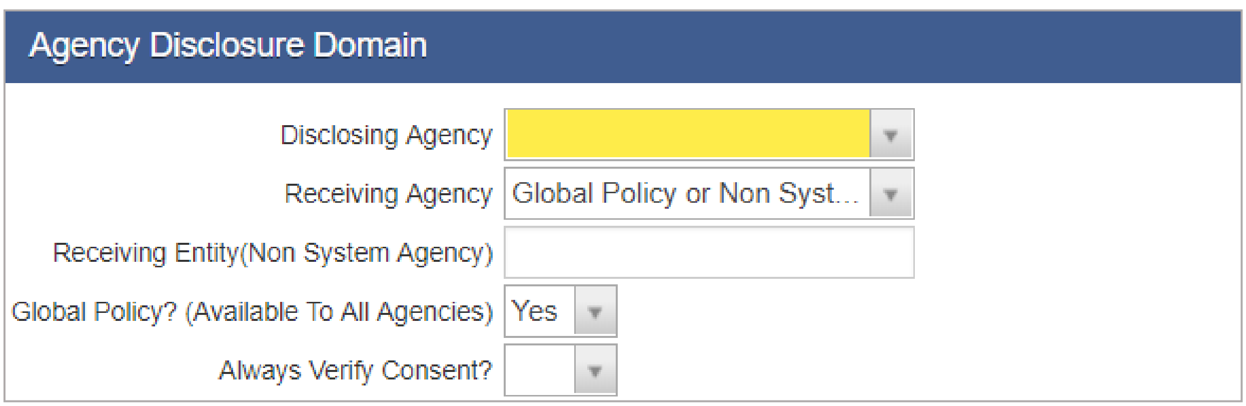


Figure 2-8: Agency Disclosure Domain section

3. In the **Agency Disclosure Domain** section, enter the following:

Table 2-3: Agency Disclosure Domain fields

Field	Description
Disclosing Agency	Select the name of your agency from the drop-down menu.
Receiving Agency	Select "Global Policy or Non System", or select an individual agency name. The "Global Policy" will apply this consent template to any agency in WITS. If an individual agency is selected, the consent template will apply only to that agency.

Field	Description
Receiving Entity (Non System Agency)	If this disclosure agreement applies to an agency outside of WITS, type that agency's name in this field.
Global Policy? (Available To All Agencies)	Select Yes or No.
Always Verify Consent	Select Yes or No. This serves as a visual reminder to the person creating the consent.

4. In the **Disclosure Domain Selection** section, enter the following:

Field	Description
Expiration Type and **+ Days**	Select either "Discharge (UD)" or "Date Signed (DS)", then when the yellow field appears, enter the number of days the consent will expire.
Consent Options	Click on the desired options, and then move the selections to the Selected Options box using the mover buttons. When staff members create client-specific consent records, these options will automatically populate.

5. When complete, click **Finish** to complete and save the disclosure record.

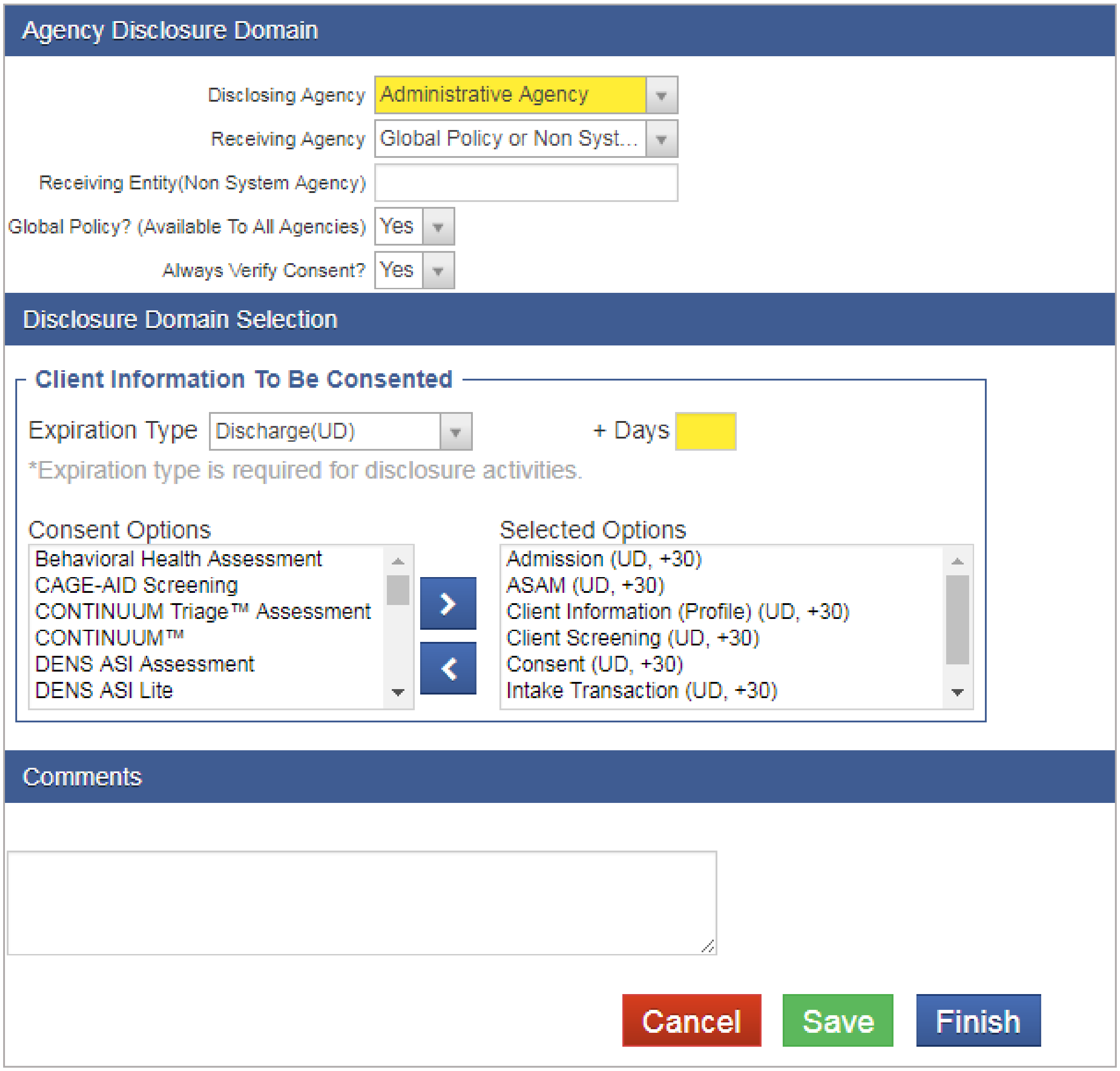


Figure 2-9: Disclosure screen

Announcements (Optional)

Where:* *Agency* > *Agency List* > *Announcements

Home Page Announcements allow System Administrators and Agency Administrators to set up custom announcements which can be displayed for individual agencies, all agencies with a specific Agency Type (e.g. Substance Abuse Treatment, Recovery Support Services), or for all agencies within the system. Announcements will only be displayed for a certain period of time, and each has its own end date. Any announcement displayed in red text has been marked high priority by the staff member who created it.

Figure 2-10: Home Page with Announcement in red text

1. On the left menu, click **Agency** and then click **Announcements**.
2. Click the **Add New Announcement** link.

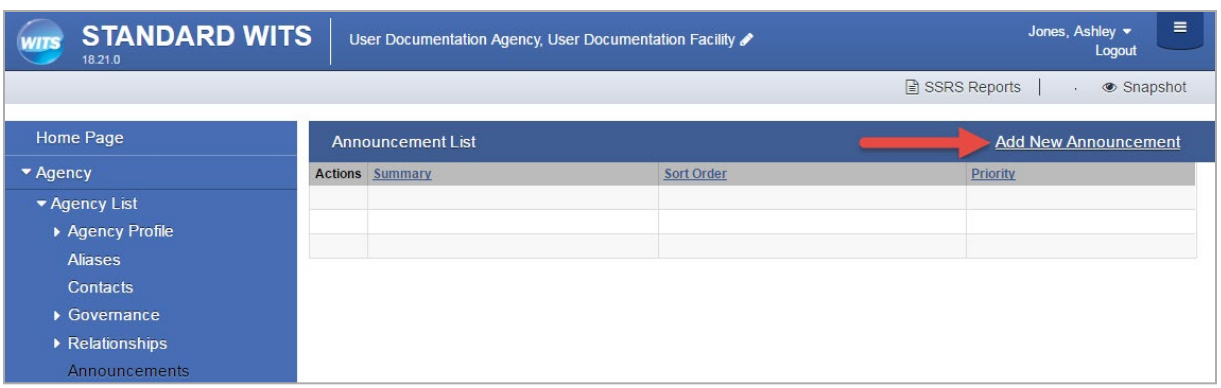


Figure 2-11: Announcements List screen

3. On the **Announcements** screen, enter the required data in the fields specified, and then click **Finish**.

Table 2-4: Announcements Fields

Field	Description
Summary	Type a summary of the announcement.

Field	Description
Details	(Optional) Type additional details about the announcement. Users will be able to see these details by hovering over the Actions column, and clicking Review. 
Agency Type	(Optional) To display an announcement for all agencies with a specific Agency Type, select an option from the Agency Type drop-down field.
Selected Domains	(Optional) Select one or more domains where the announcement should be displayed.
Agency	If the Agency drop-down field is left blank, the announcement will be displayed across all agencies.
Priority	Select from the drop-down field. A Priority of "High" will display the announcement in red.
Start Date	Enter a start date for the announcement.
End Date	Enter an end date for the announcement.

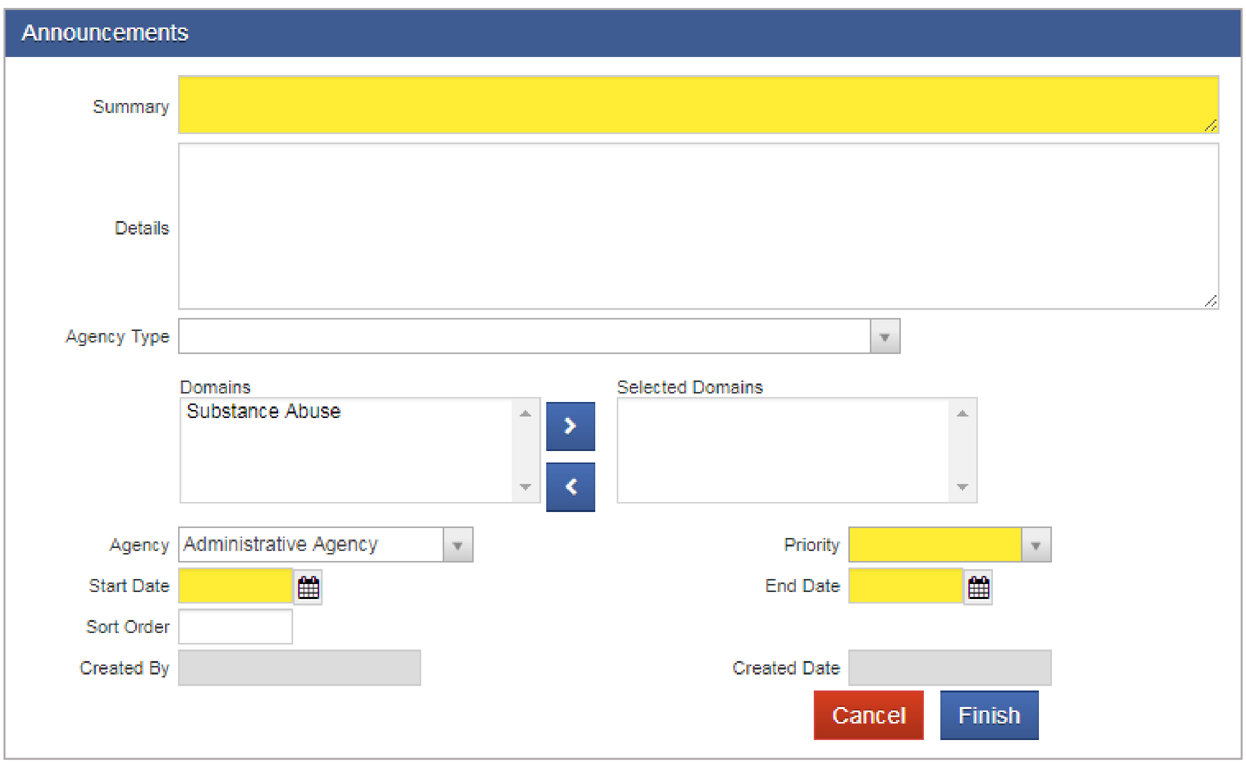


Figure 2-12: Announcements screen

4. To edit or delete the details of an announcement, click the **Review** link under **Actions** column.

> **Note**: If the **Agency** drop-down field is left blank, the announcement will be displayed across all agencies. High priority announcements will be displayed in red on the Home Page for users to see.

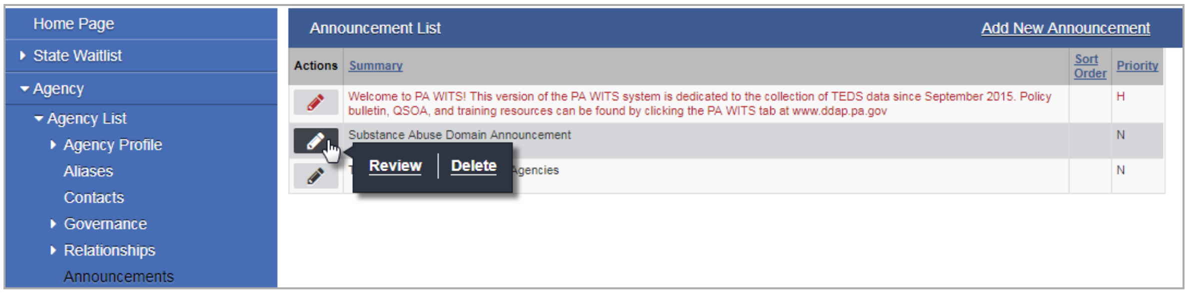


Figure 2-13: Announcement List screen, Actions links

Part 3: Facility Administration

Facility Profile

***Where:* Agency > Facility List > Facility Profile**

A facility in WITS corresponds to a physical location where services are rendered. Every agency must have at least one facility created, but only the facility profile and address information are required. For the SOR process, also need to create at least one program for each facility. Optional facility information includes Contacts, Operating Hours, and Special Services.

Before creating a facility, ensure your current **Location** reflects the agency associated with the facility.

1. On the left menu, click **Agency**, and then click **Facility List**.

2. Click the Add New Facility **Record** link.

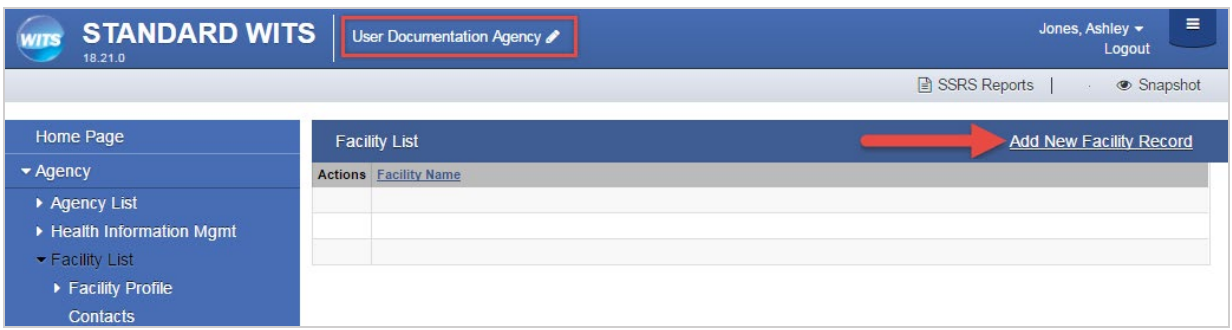


Figure 3-1: Facility List screen

3. On the **Facility Profile** screen, enter the required information:

Table 3-1. Facility Profile Fields

Field Name	Description
Facility Name	Type the facility's name.
Display Name	The facility's display name will appear in drop-down menus throughout the system and should be meaningful to all staff members; this field will automatically copy the first 15 characters from the "Facility Name" field but this information can be edited; there is a 15 character limit for this field.
I-BHS #	Required field, used in the TEDS/NOMS extract process
Service Location	Value selected will be the default value on the encounter Service Location field for encounters created for this agency and facility
Operations Start/End Date	Optional/Informational
Reports Start/End Date	Optional/Informational
Contact	Optional/Informational
Alternate Contact	Optional/Informational
Facility ID	Optional/Informational
National Provider ID	Optional/Informational (important when using WITS for billing)
Senate Dist	Optional/Informational

Field Name	Description
House Dist	Optional/Informational
Cong Dist	Optional/Informational
County	Select from the drop-down menu.
Geo Code	Optional/Informational
URL	Optional/Informational
Description	Optional/Informational
Selected Approaches	Optional/Informational
Selected Languages	Optional/Informational

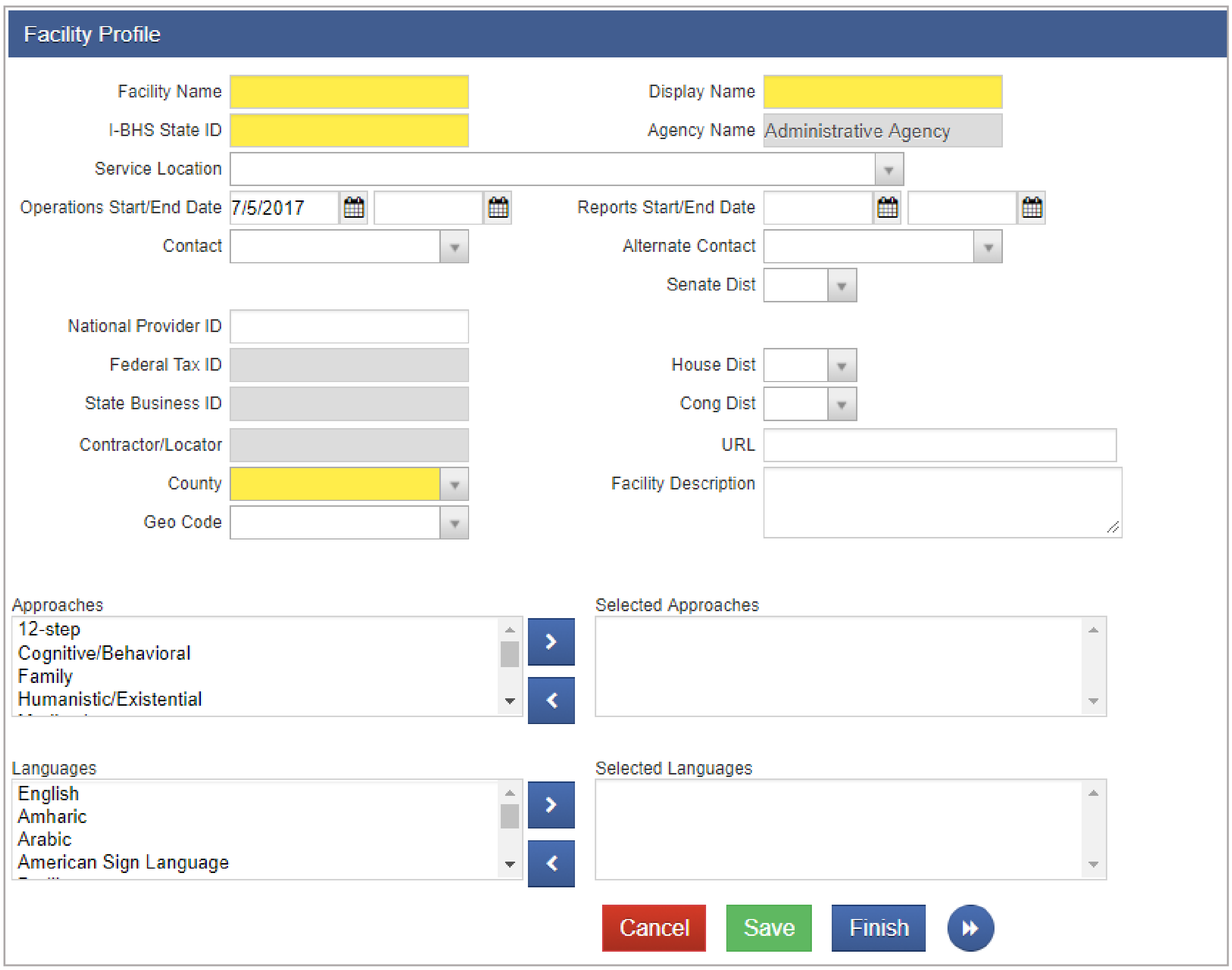


Figure 3-2: Facility Profile screen

4. When complete, click **Save**.
5. Click the **right-arrow button** to enter the address.

6. Click the **Add Address** link.

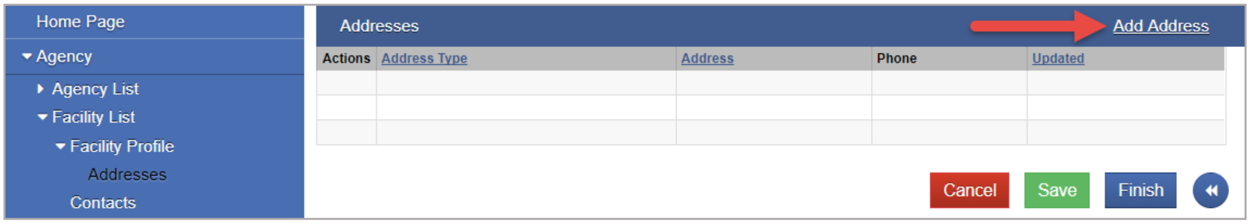


Figure 3-3: Add Facility Address

7. Enter the required information as shown in the table below.

Table 3-2: Address Information fields

Field	Description
Address Type	Select from the drop-down menu.
Confidential	This field defaults to "No"; update if applicable.
Address Line 1	Type the first address line.
Address Line 2	Type the second address line, if applicable.
City	Type the city name.
State	Select state from the drop-down menu.
Zip	Type the zip code.

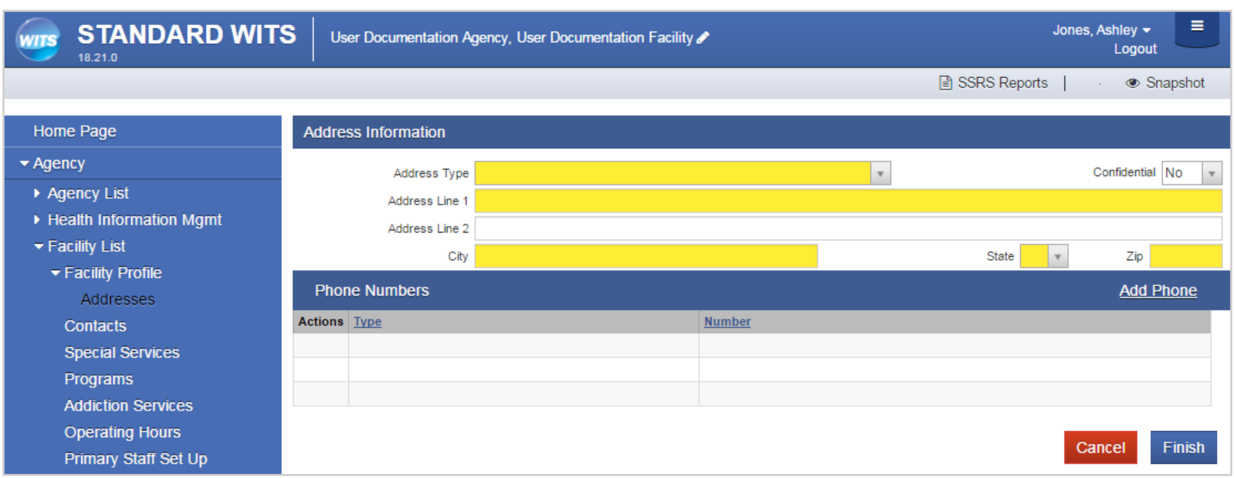


Figure 3-4: Facility Address screen

8. If available, add a telephone number by clicking **Add Phone**.

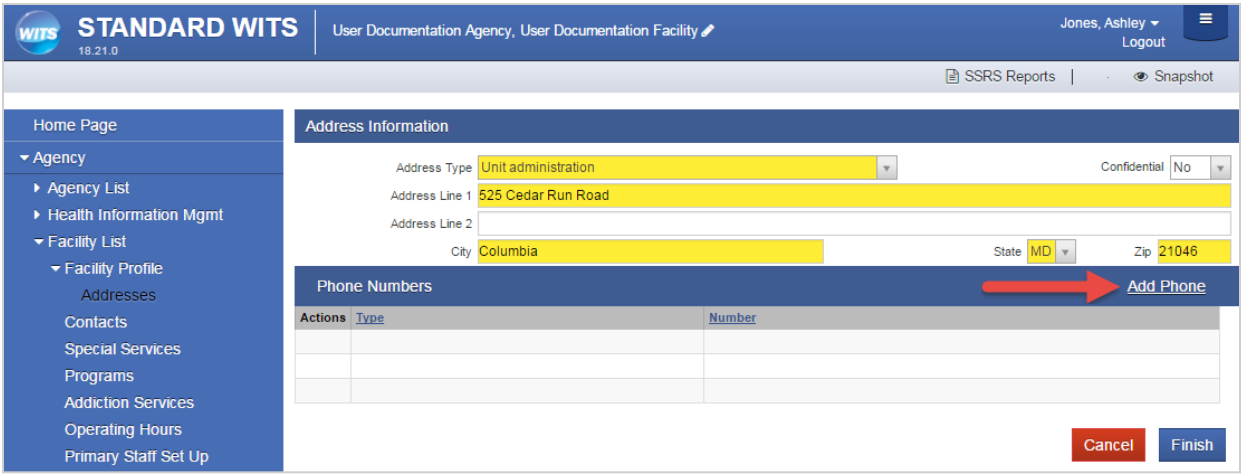


Figure 3-5: Facility Address screen, Add Phone link

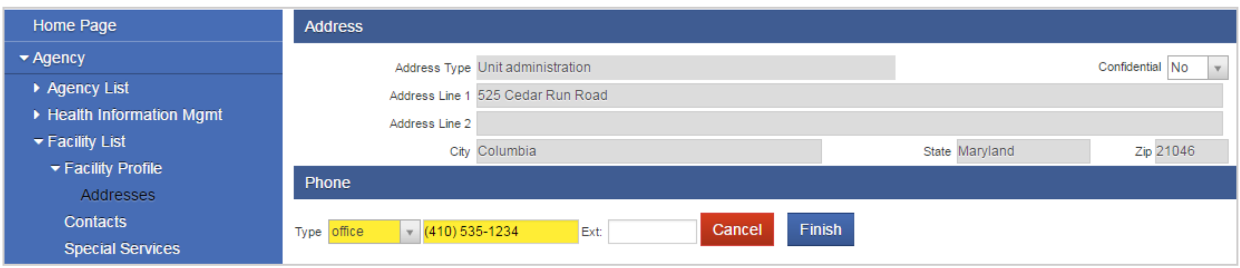


Figure 3-6: Facility Address screen, Add Phone Number

9. Enter the phone number, and then click **Finish**.

10. On the Address Information screen, click **Finish**.

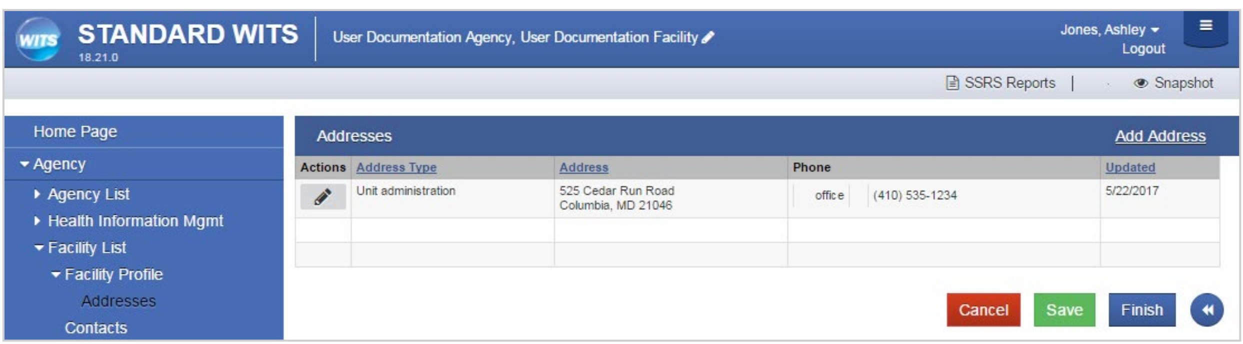


Figure 3-7: Facility Addresses screen with address and phone number added

11. On the Addresses screen, click **Save** and then click **Finish**.

Contacts

***Where:* Agency > Agency List > Facility List > Contacts**

Note: Staff Members must be set up in the agency before Contacts can be added to the Facility. Please see the Staff Management section of this document for information on managing staff accounts.

Information listed in the Contacts information is informational only, allows you to indicate administrative functions for staff in the agency (e.g., staff member is the contact for program availability or the staff member is the person monitoring referrals). WITS Administrators can modify the Contact Type dropdown values in the Staff Contact Role code set table.

1. On the left menu, click **Agency**, click **Facility List**, and then click **Contacts**.
2. Click **Add Contact**.

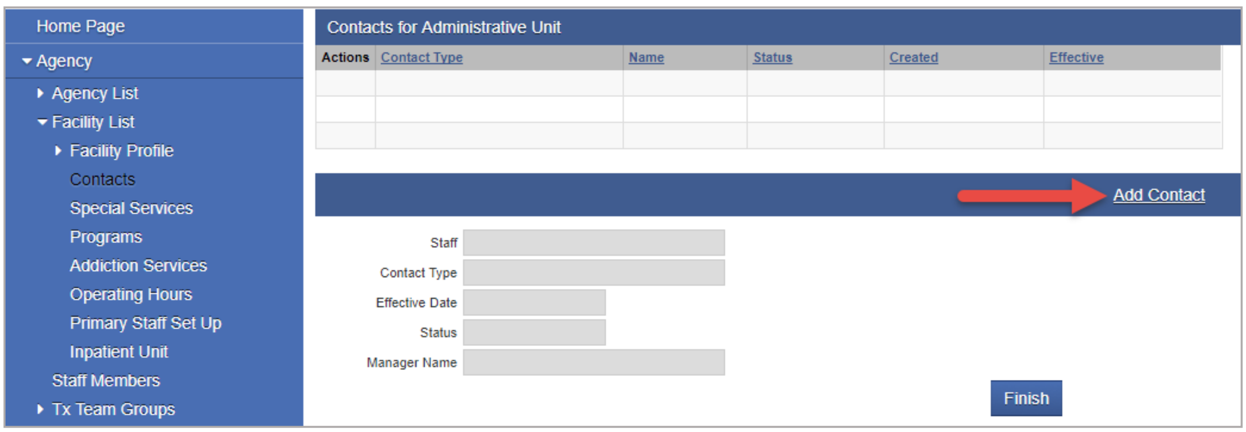


Figure 3-8: Facility Contacts screen

3. Complete the fields.

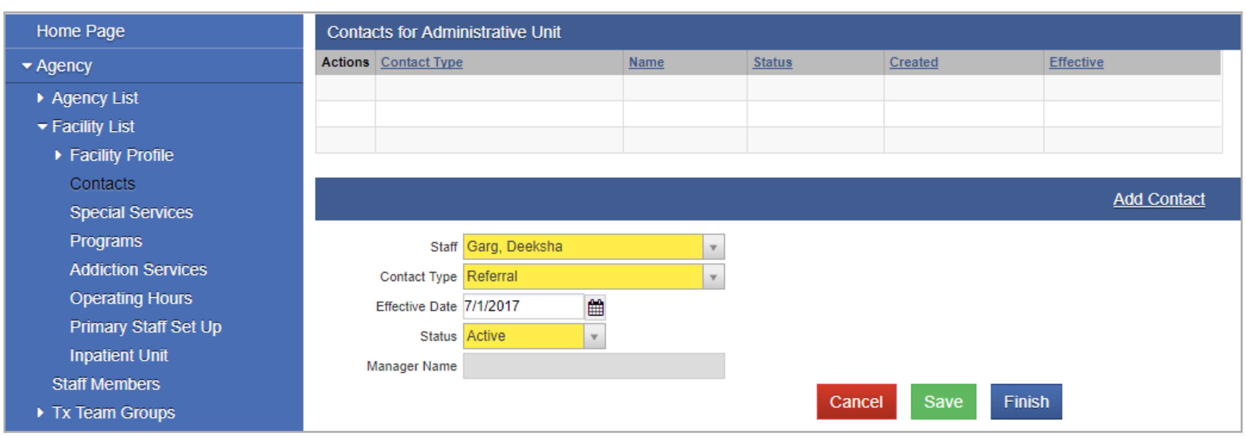


Figure 3-9: Facility Contacts screen, add new contact

4. Click **Save**. Add additional contacts if needed.
5. Click **Finish**.

Special Services (Optional)

Where: Agency > Agency List > Facility List > Special Services

1. On the Special Services screen, select **Special Population Services** from the mover box, if applicable.
2. Click **Add New Information Item**, if applicable.

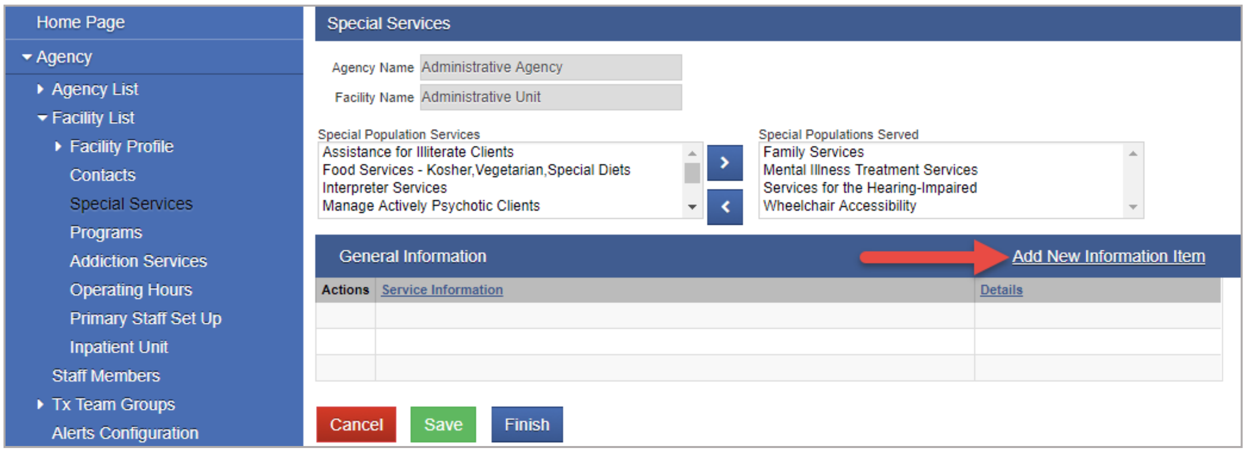
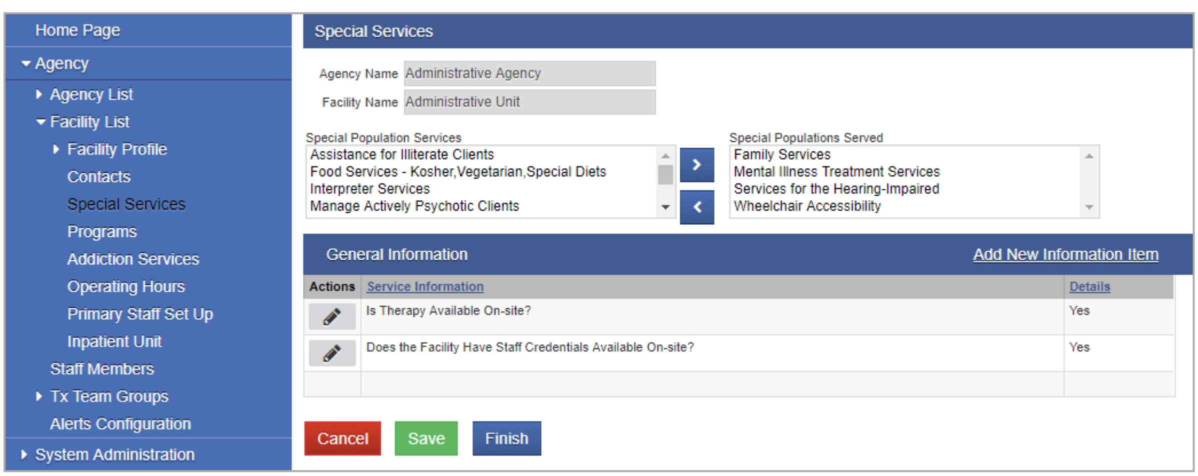


Figure 3-10: Facility Special Services screen, Add New Information Item link

3. Select an item from the **Facility Supported Services** drop-down list.

Figure 3-11: Add New Information Item screen

4. Click **Save** then click **Finish**.



5. Click **Save**.

Programs

***Where:* Agency > Agency List > Facility List > Programs**

Each facility in WITS should have one or more Programs listed to indicate the type of services it provides to clients. Each program must have a Modality or Level of Care. Programs that are set up outside of treatment can select a modality type of unknown. Programs types can include substance use treatment, social service programs addressing behavioral health, problem gambling, substance use prevention, juvenile justice, problem solving courts, and primary health applications.

1. On the left menu, click **Agency**, then click **Facility List**, and then click **Programs**.
2. Click the **Add New Program Record** link.

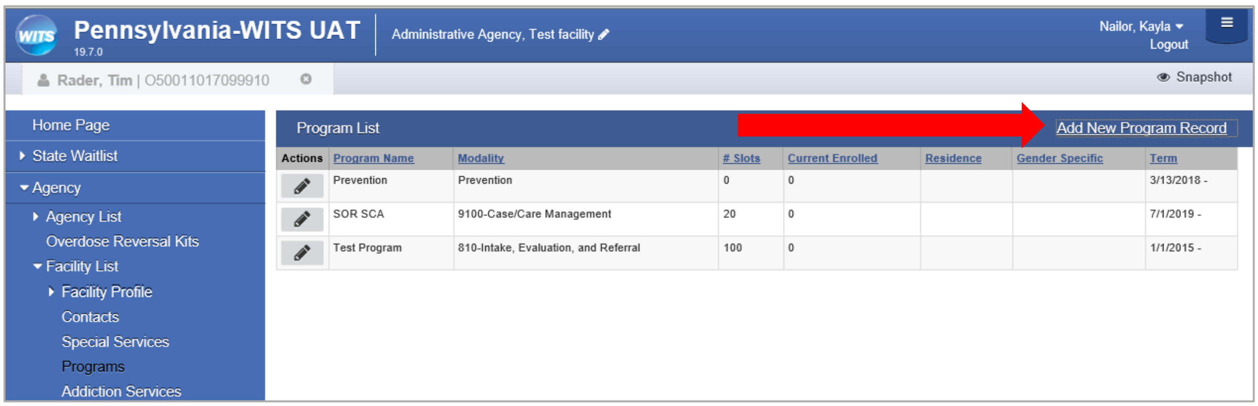


Figure 3-12: Programs List

Important: Program Setup Fields for SOR Processing:

- **Grant**: Complete the Grant field by selecting **"SOR"** from the drop-down list, as this field controls SOR Grant Episode functionality.
- **Modality**: Complete the Modality field by selecting a value where the *Admission Required* column in the "Modality Type" code table is set to "**No**".
- **Modality Specifier**: For MAT programs select the Modality Specifier of **"Medication Assisted Treatment**" to have the *Medications Dispensed* field appear on the encounter.
- **Report to TEDS**: Leave the Report to TEDS field as the default value of **"No"**.

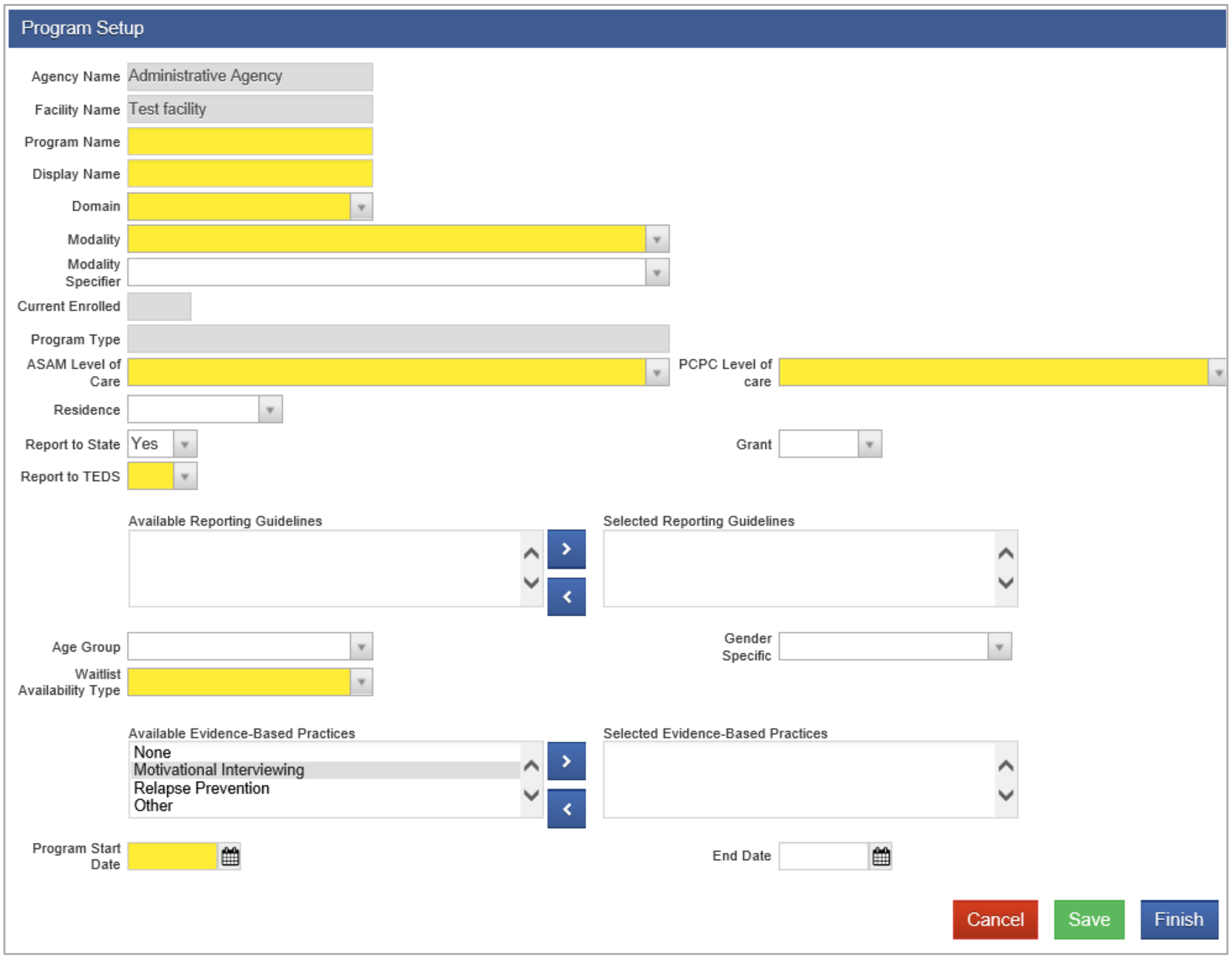


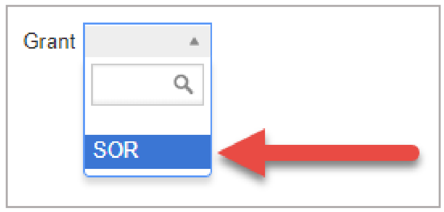
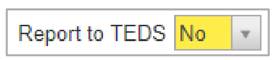
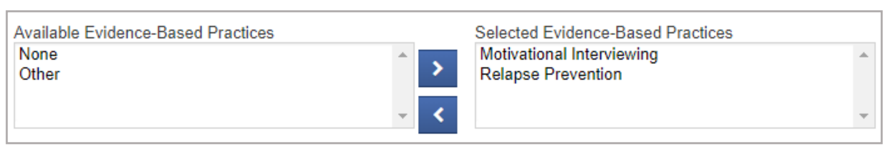
Figure 3-13: New Profile Setup screen

3. On the Program Setup screen, complete the fields as shown in the table below.

Table 3-3: Program Setup Fields [2]

Field	Description
Program Name	Program name should be one of the following, depending on the type of service your agency is providing: • SOR SCA • SOR DOC • SOR DHS/Housing • SOR PCCD/MAT
Display Name	Type the program's display name. **Note**: this field is limited to 15 characters.
Domain	Select the domain from the drop-down list.
Modality*	Select modality that is the best fit for this program. **Note**: Values are controlled through the code table named, "Modality Type".

[2] *Fields marked with an asterisk (*) are important for SOR programs. Make sure these fields are set up correctly.

Field	Description
Modality Specifier*	(Optional) To record medication-assisted treatments on client encounters, select "Medication-Assisted Treatment" from the drop-down field. 
Current Enrolled	Read-only field displaying the number of clients currently enrolled in the program.
Program Type	Read-only field.
Level of Care	Assign appropriate ASAM level of care.
Residence	Select the location from the drop-down list.
Grant*	Select "SOR" from the drop-down field.  **Note:** This field is optional but must be completed for SOR programs.
Report to State	Select Yes or No.
Report to TEDS*	Select No. 
Age Group	Leave blank if your program is not restricted by age.
Gender Specific	Leave blank if your program is not restricted by gender
Selected Evidence-Based Practices	(Optional) Select the appropriate Evidence-Based Practices as applicable. 
Program Start Date	Enter the program's start date.
Program End Date	Add an end date when the program is no longer available.

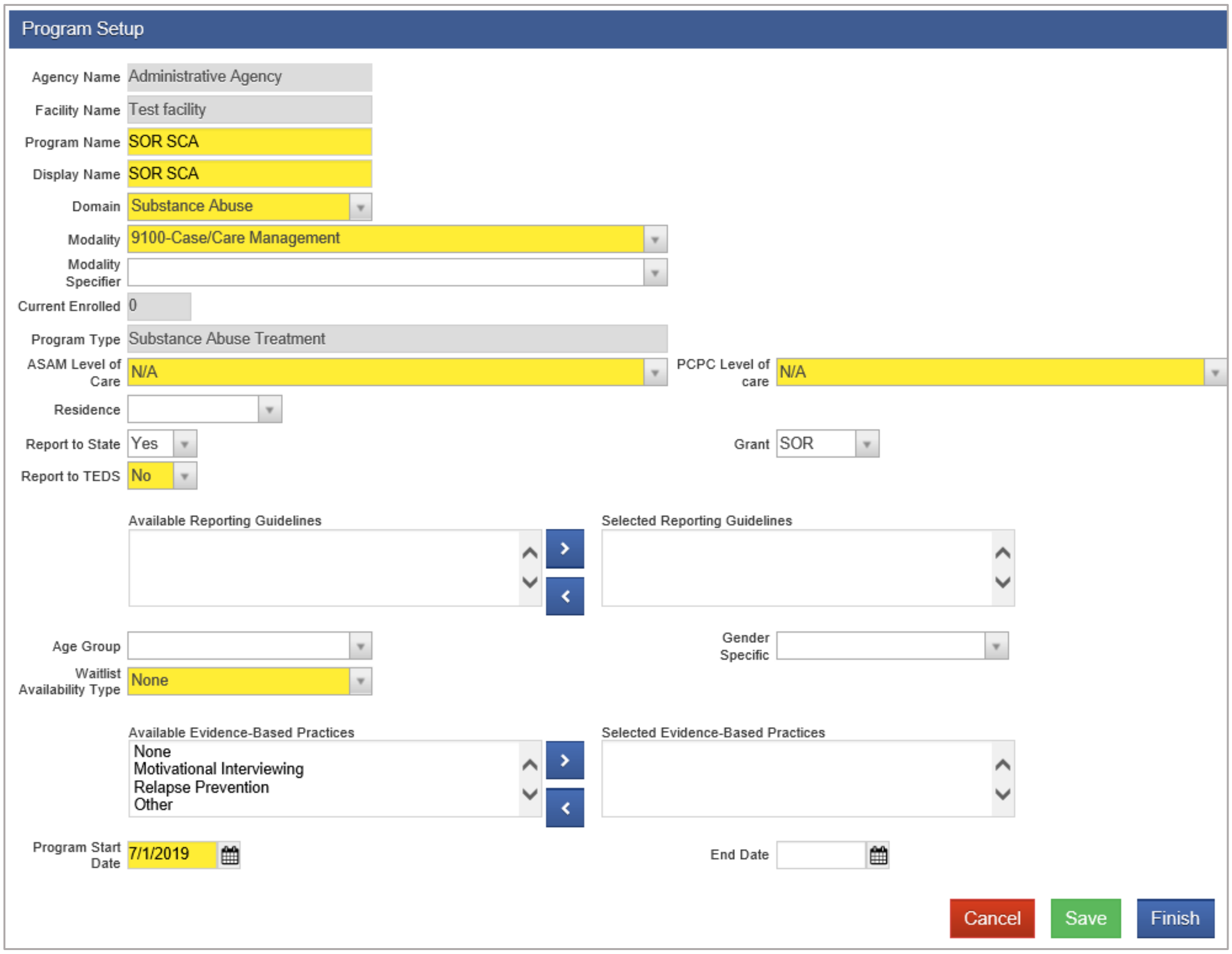
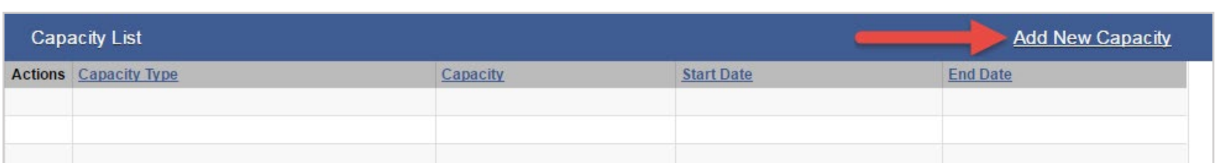


Figure 3-14: Example of MAT Program Setup fields

4. Click **Save**. Once you click Save, certain fields will be grayed out and you will no longer be able to edit them.
5. Click **Add New Capacity**.



6. Complete the fields:

Table 3-4: Program Capacity Details fields

Field	Description
Capacity Type	Select Beds or Slots from the drop-down list.
Daily Capacity	Type the maximum number of Beds or Slots that can be filled on one day.
Start Date	Enter the start date for this capacity type.
End Date	(Optional)
Note	(Optional)

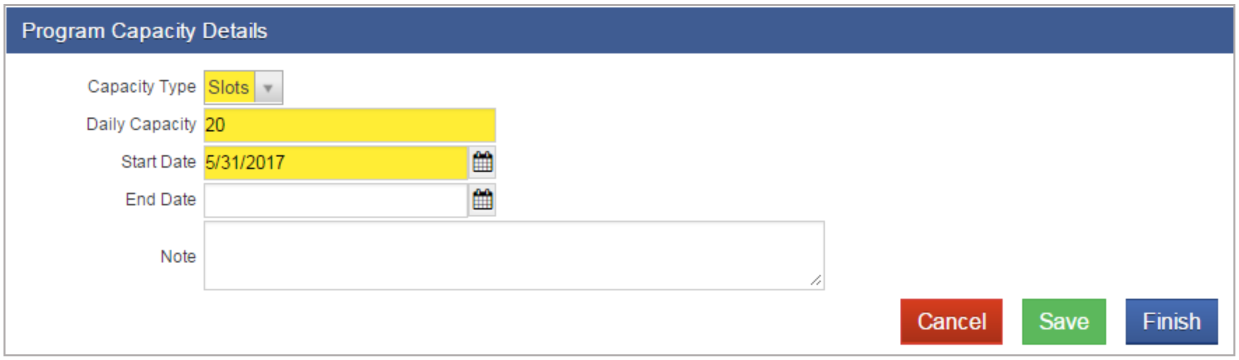


Figure 3-15: Program Capacity Details screen

7. Click **Finish**.

8. Click **Save** and then click **Finish**. Add additional programs if needed.

If a program needs to be edited, from the Program List, **hover** over the pencil icon and click **Review**.

Addiction Services (Optional)

***Where:* Agency > Agency List > Facility List > Addiction Services**

Enter addiction services for your facility, if applicable.

1. On the left menu, click **Agency**, then click **Facility List**, and then click **Addiction Services**.

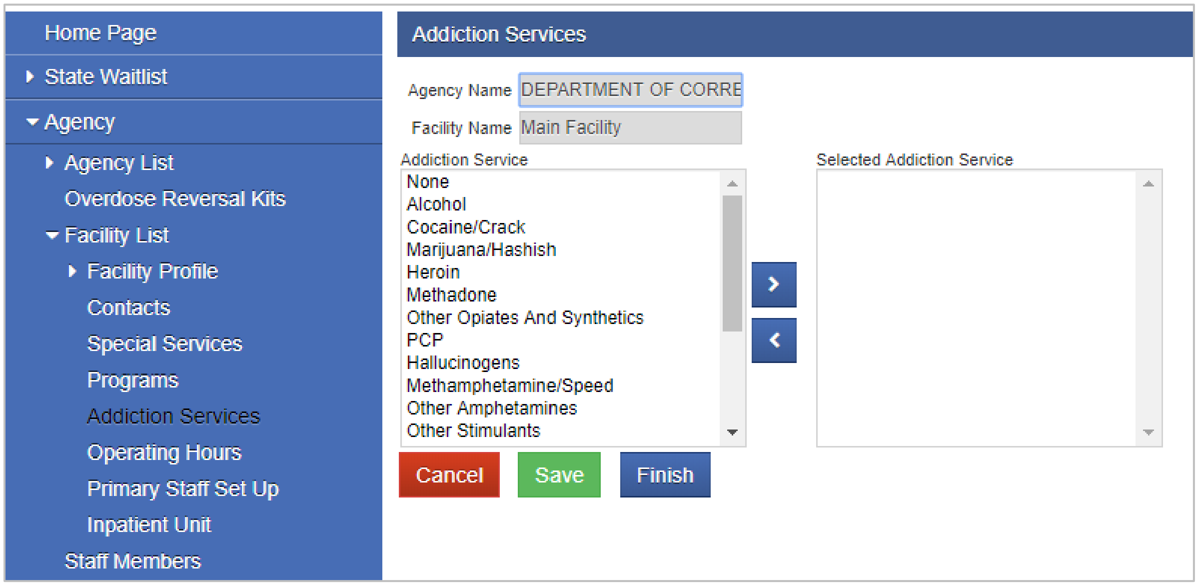


Figure 3-16: Addiction Services screen

2. Click **Save** and then click **Finish**.

Operating Hours

Where: Agency > Agency List > Facility List > Operating Hours

The facility's operating hours can be entered on this screen.

- Please enter times in **hh:mm** format followed by "**AM**" or "**PM**" (ex: 08:30 AM).
- Multiple ranges can be created within one day, such as 8:00 AM-12:00 PM (Range 1), then 12:30 PM-8:00 PM (Range 2).

1. On the left menu, click **Operating Hours**.
2. Enter the facility's operating hours.

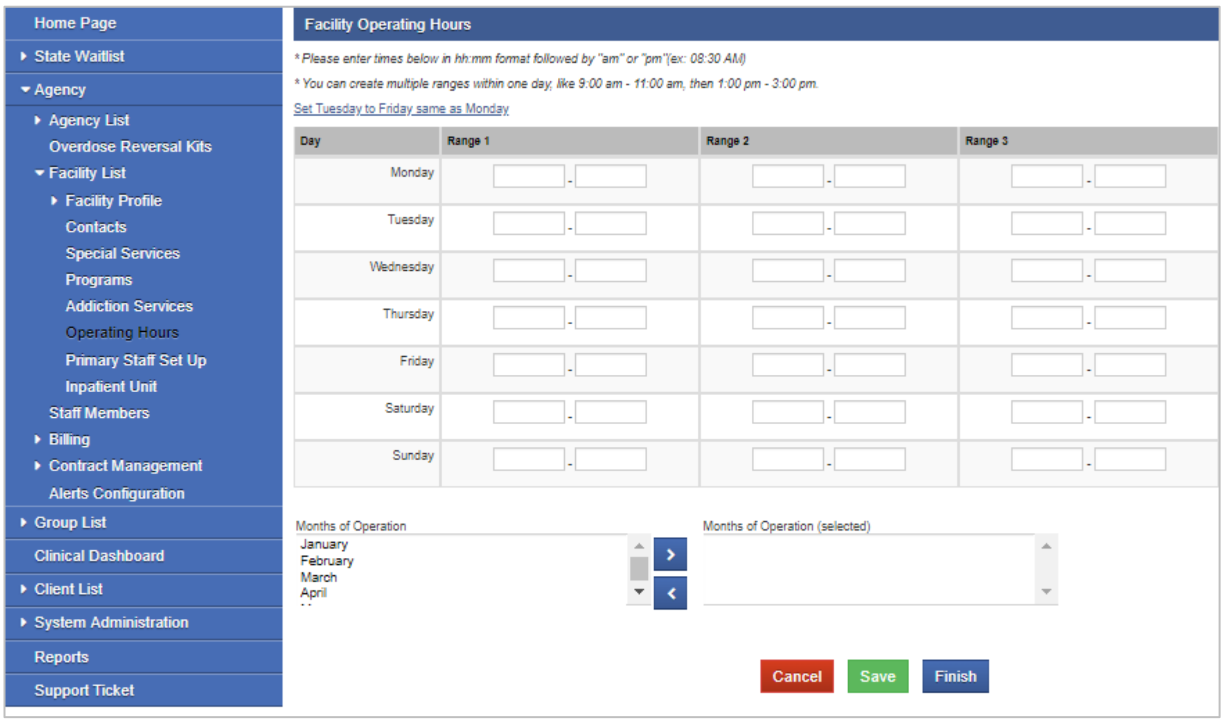


Figure 3-17: Facility Operating Hours

3. Click **Save**.

Part 4: Staff Management

Staff Management involves creating and managing staff member accounts within the system. This includes setting up new employees and assigning the correct system permissions through role assignments; troubleshooting login issues such as resetting passwords; and revoking system access when an individuals' employment ends.

Staff Member List & Search Screen

Where:* *Agency* > *Staff Members

Table 4-1: Search/List Screen Icons/Buttons

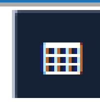
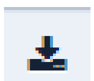
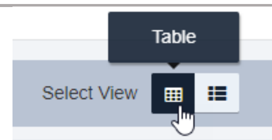
Field	Description		
	**Pencil Icon**: Pointing to the icon will display available options to click.		**Table View**: Presents data in a table format.
	**Export**: Allows the user to export results.		**Panel View**: Presents data in a panel-by-panel view.
Select Columns	**Column Selector**: Allows the user to select the columns that they would like to view.		**Hover Text**: When you point to an item or symbol, text describing the item may appear.
Search... Search		**Search**: Type within the search field and then click the Search button.	
Previous 1 2 3 4 5 Next		**Pages**: Allows the user to page through all search results.	

Table 4-2: Workspace Screen Icons/Buttons

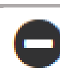
Field	Description		
EDIT	**Edit**: Click to enable editing for the screen. Otherwise, the panels on screen will be read-only.		
Add	**Add**: Allows the user to add data to the panel or section.		**Remove**: Allows the user to delete information in the panel or section.
	**Edit**: Allows the user to edit information on a panel or section.		**History**: Allows the user to view the changes made on the current page.
Save	**Save button**: All required fields have been completed.	Cancel	**Cancel button**: Click to leave the screen/panel without saving.
Save	**Inactive Save button**: Required fields are incomplete; button cannot be selected.	Lock	**Lock**: Allows the user to lock an account.
DONE EDITING		**Done Editing**: Click when finished edited screen.	
Back to Search		**Back to Search**: Click to return to the Search screen.	

Table 4-3: Workspace Screen Data Fields

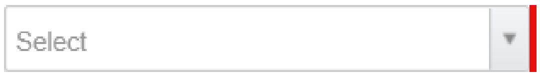
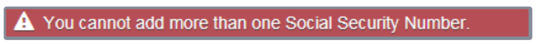
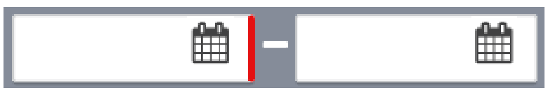
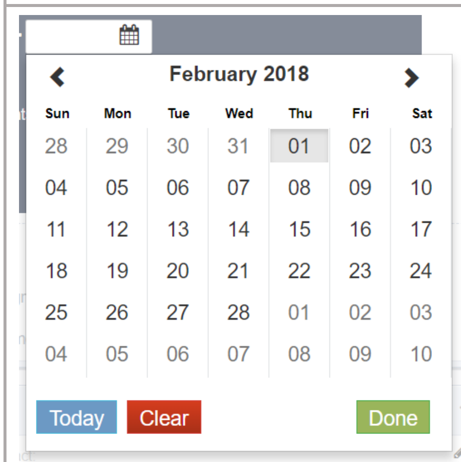
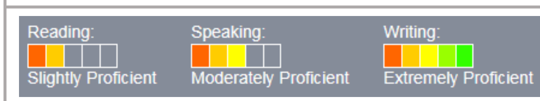
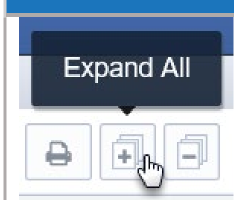
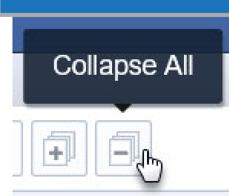
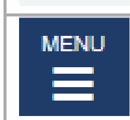
Field	Description
	Required Field: Required fields are marked with a red line on the right side. This field must be completed to save the screen/panel.
	Optional Field: This field may be left blank.
	**Drop-down field**: Select one option from the list.
	**Error Message**: The error message is localized and is generated where the error occurred.
	**Date-range fields/Calendar picker**: Enter a date or click the calendar icon to select a date.
	**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.

Table 4-4: Workspace Screen, Other Icons/Buttons

Field	Description		
	**Expand All**: Expands all collapsed panels on workspace screen.		**Collapse All**: Collapses all expanded panels on workspace screen.
	**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”).

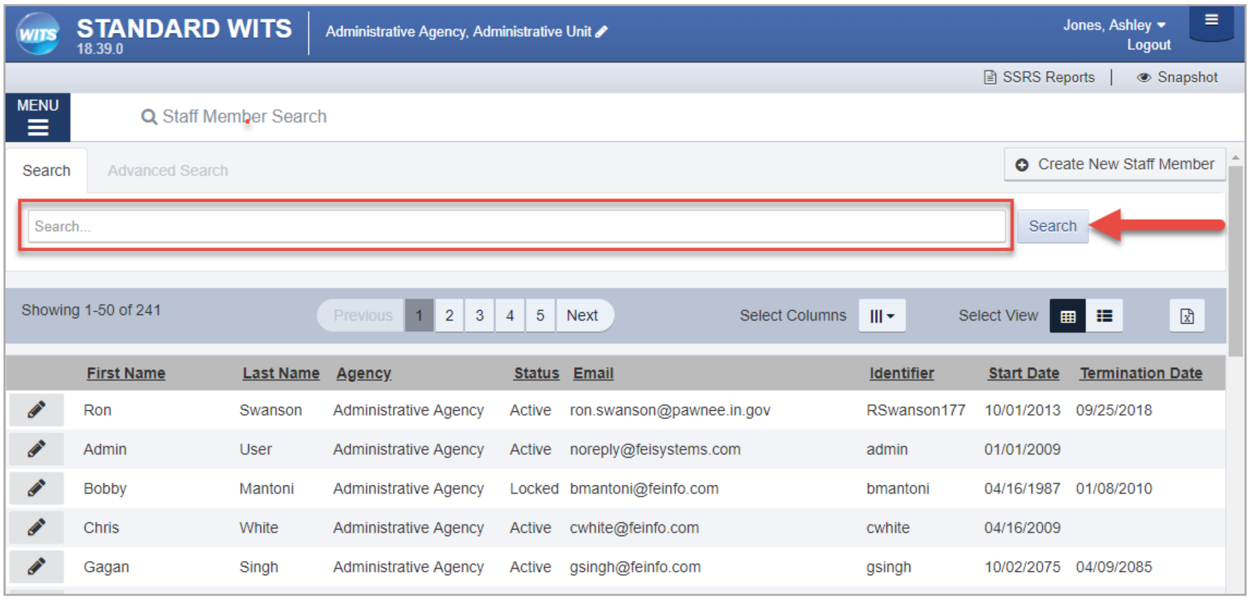
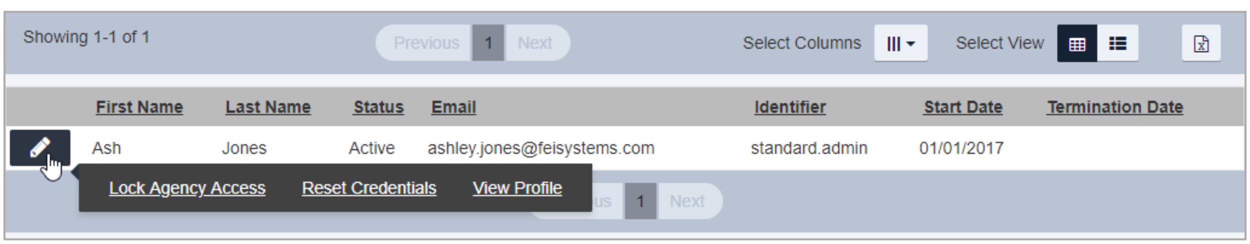
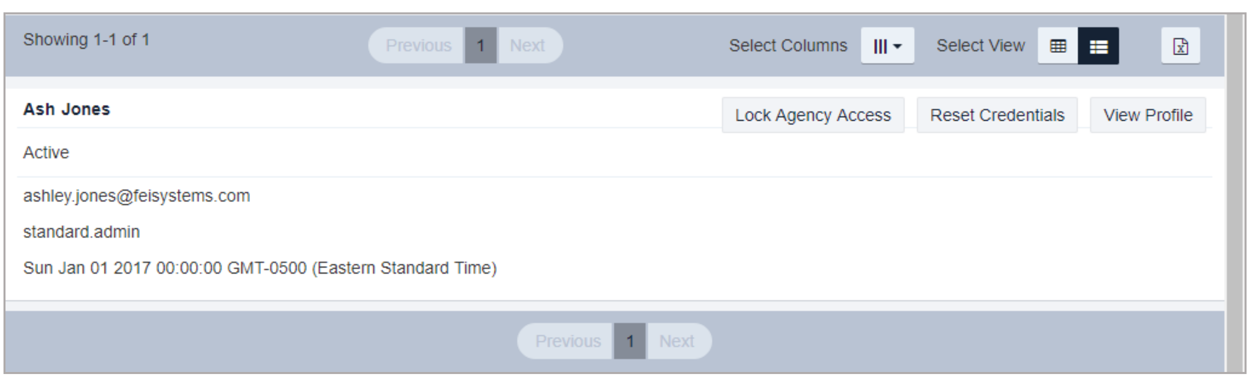


Figure 4-1: Staff Member Search/List screen

Table View



Panel View



Advanced Search

1. On the left menu, click **Agency**, and then click **Staff Members**.
2. Click the **Advanced Search** tab.

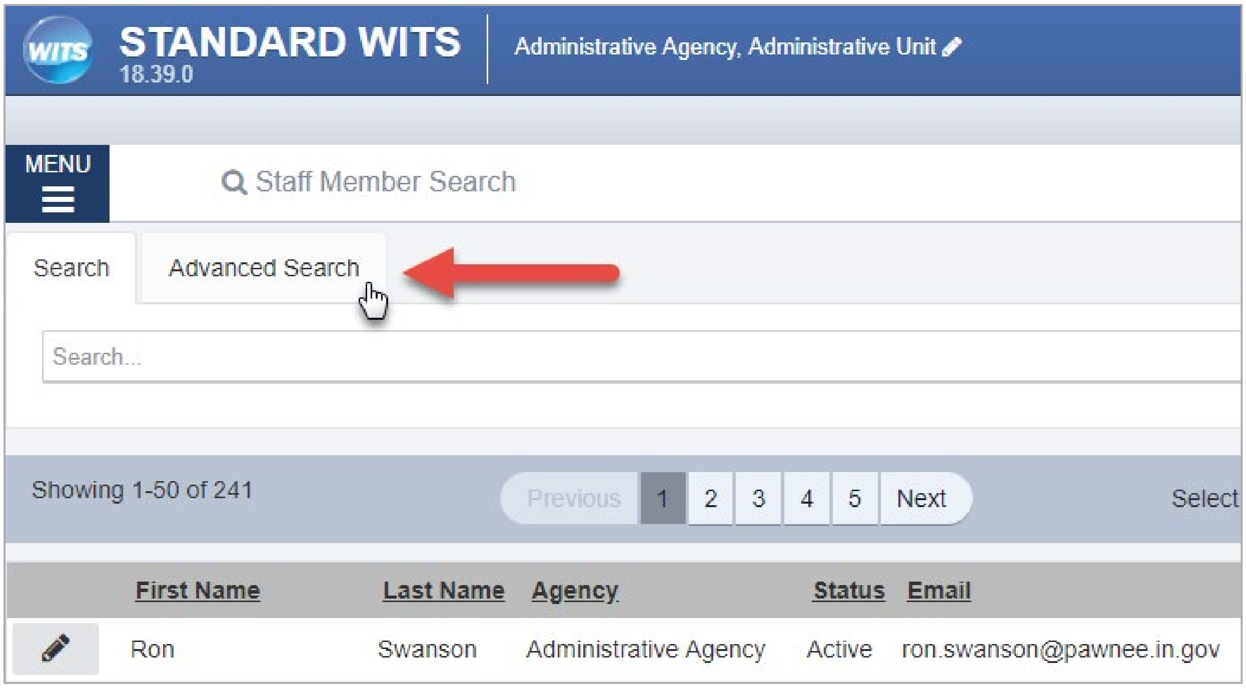


Figure 4-2: Advanced Search tab

3. Click **Add Search Criteria**. This will display a drop-down list.

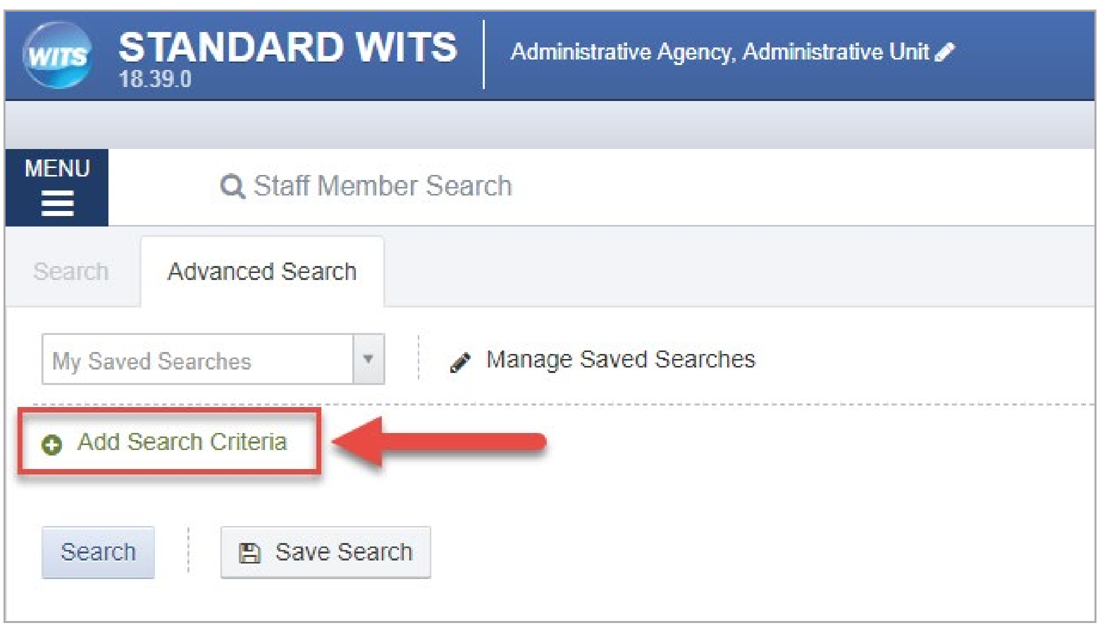
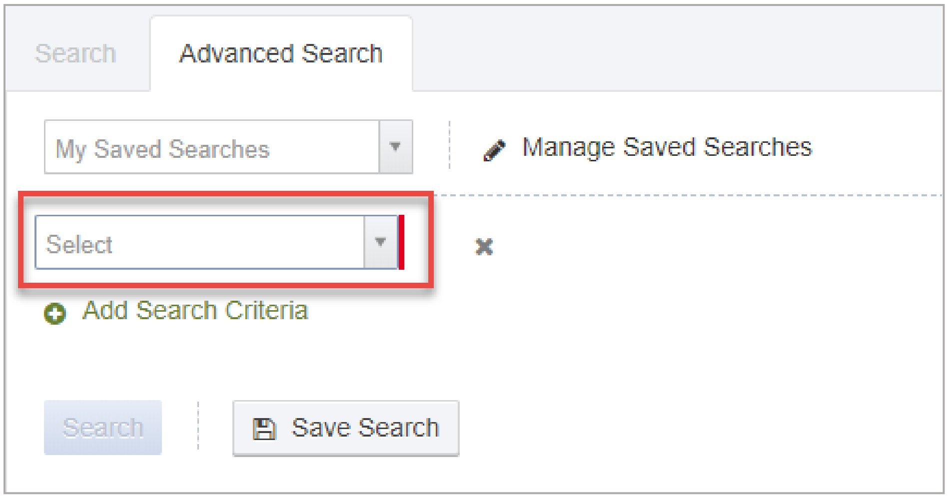


Figure 4-3: Add Search Criteria



4. Click an option from the drop-down list.

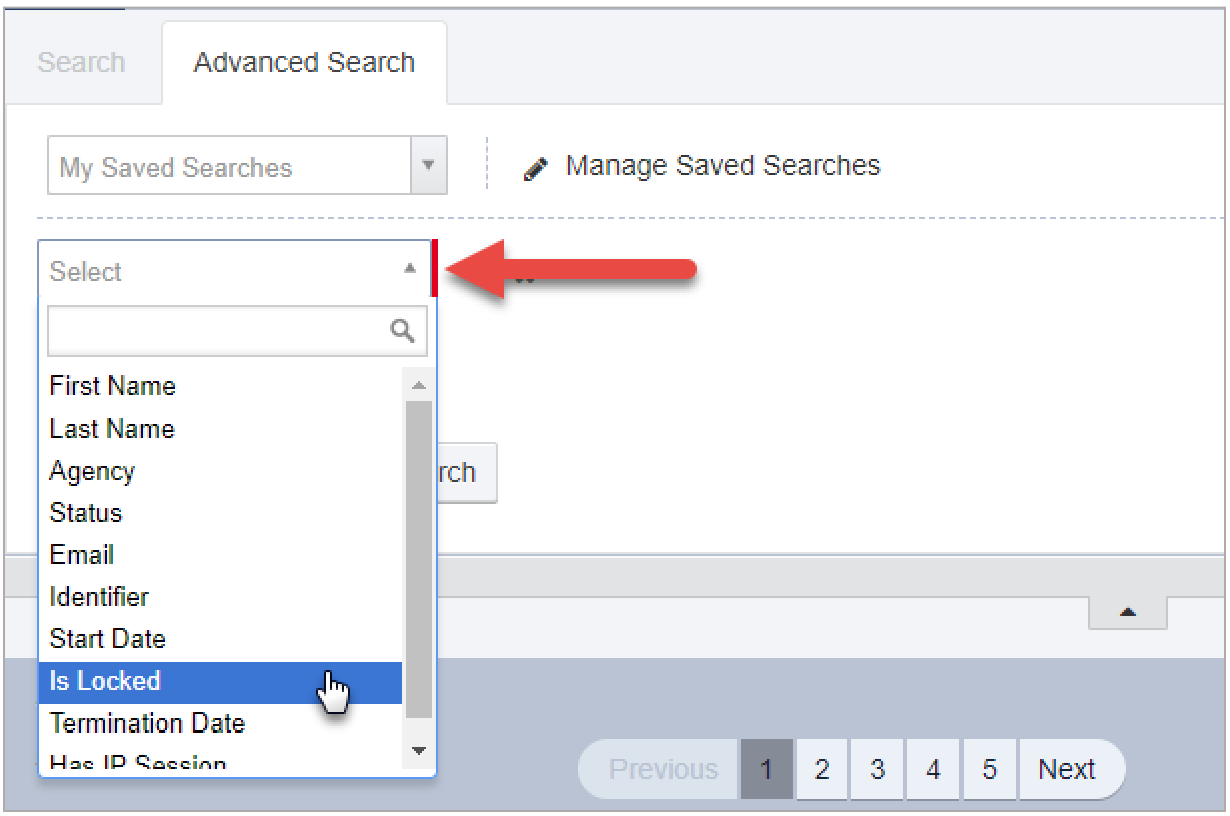


Figure 4-4: Advanced Search Selection

5. Based on the option selected, additional field(s) will be displayed to select further search criteria. In this example, select True or False.

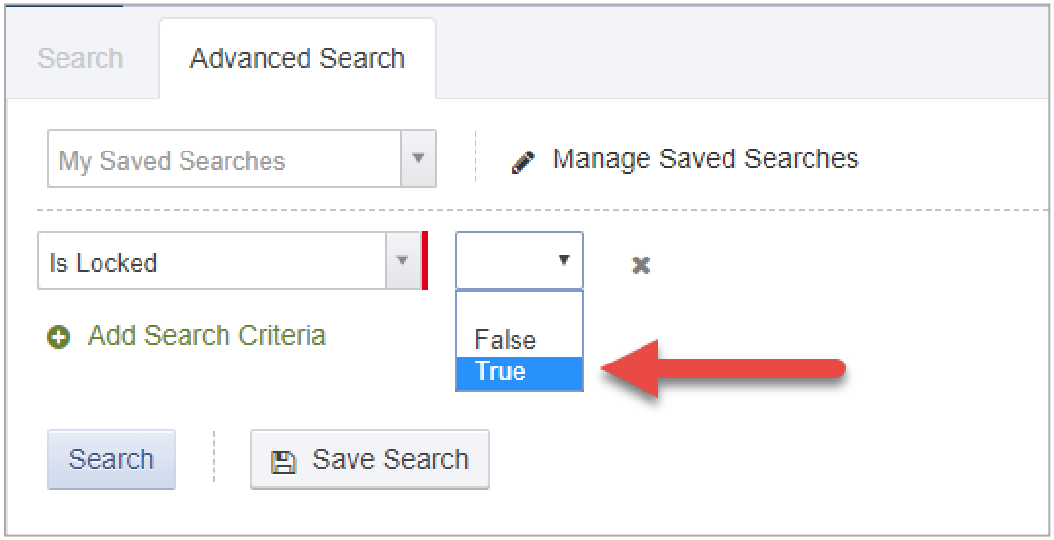


Figure 4-5: Additional Advanced Search Criteria

6. After any additional search criteria is entered, click **Search**.

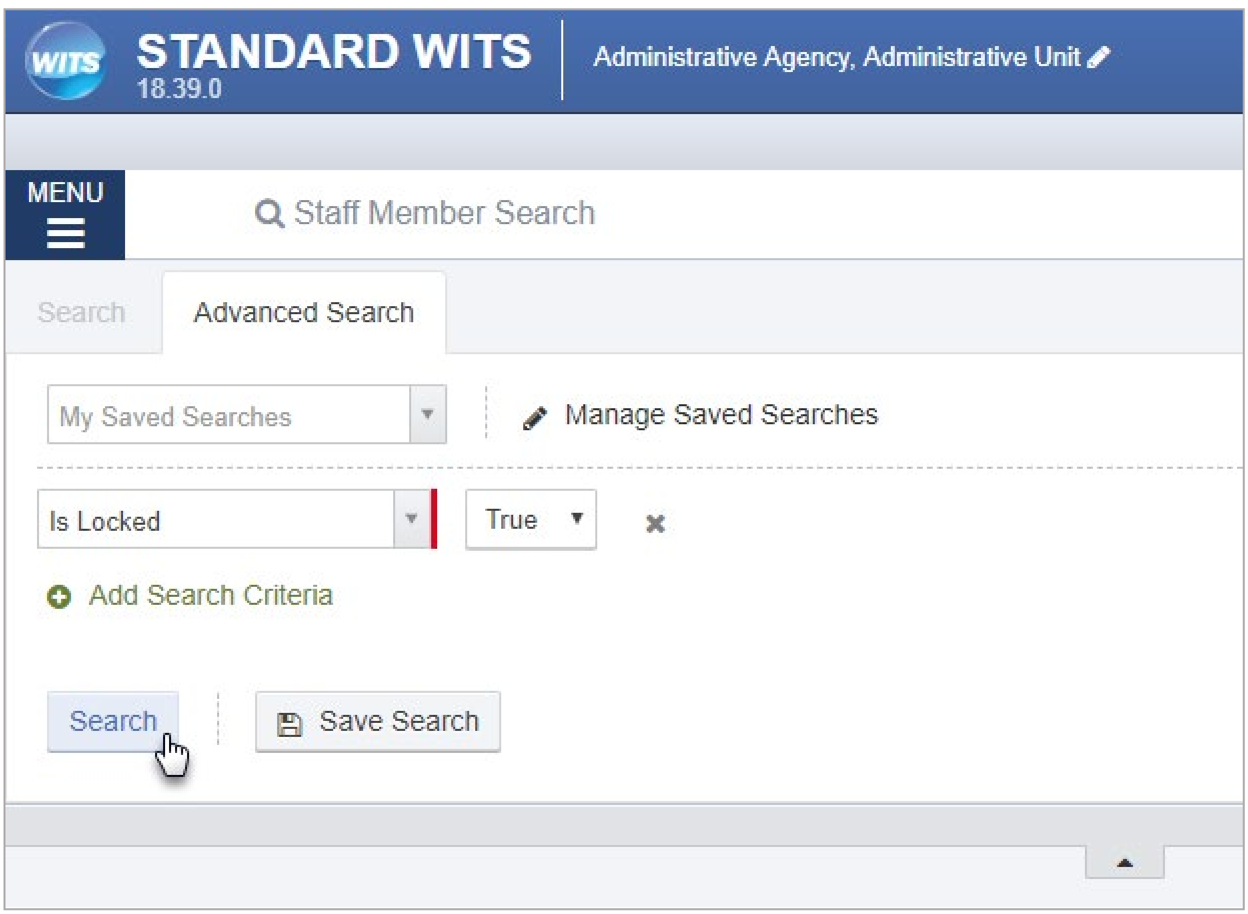
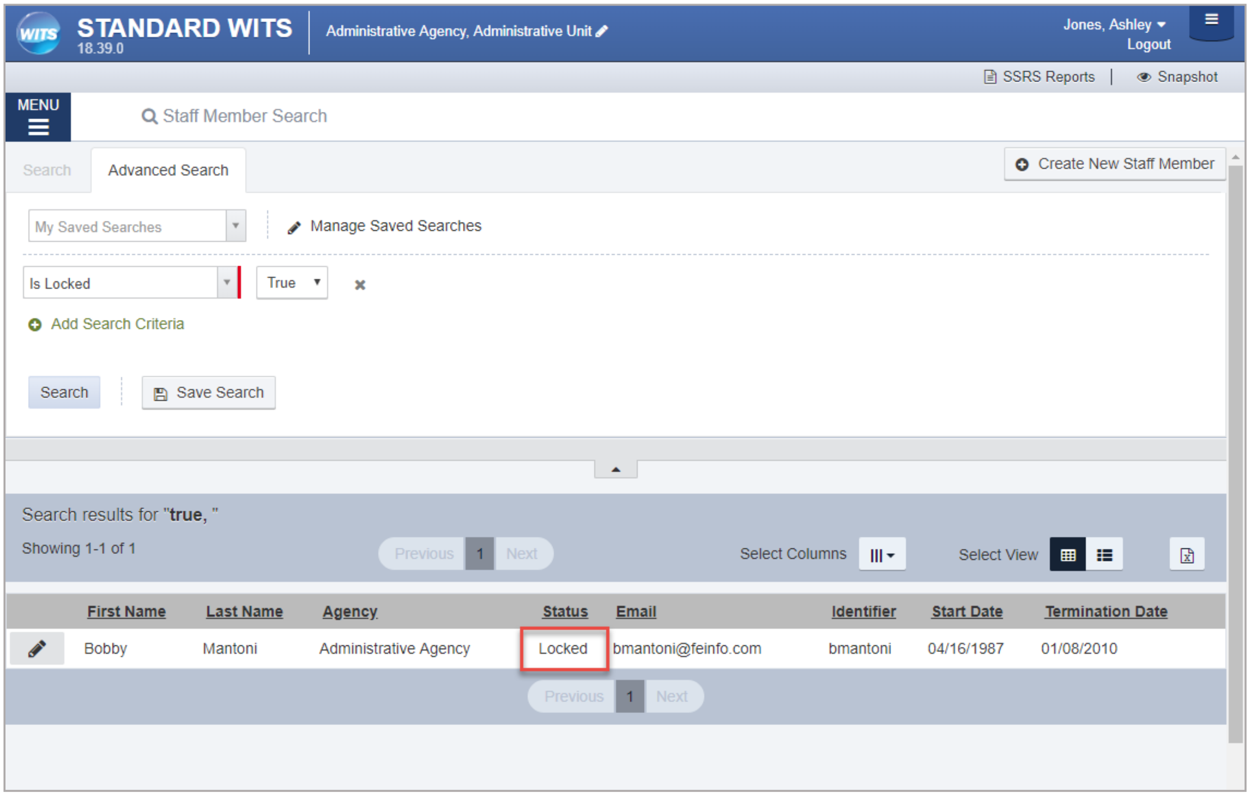


Figure 4-6: Advanced Search; Click Search

7. The search results (if any) will be displayed in the list on screen.



Save Advanced Searches

1. To save your advanced search to use at another time, click **Save Search**.

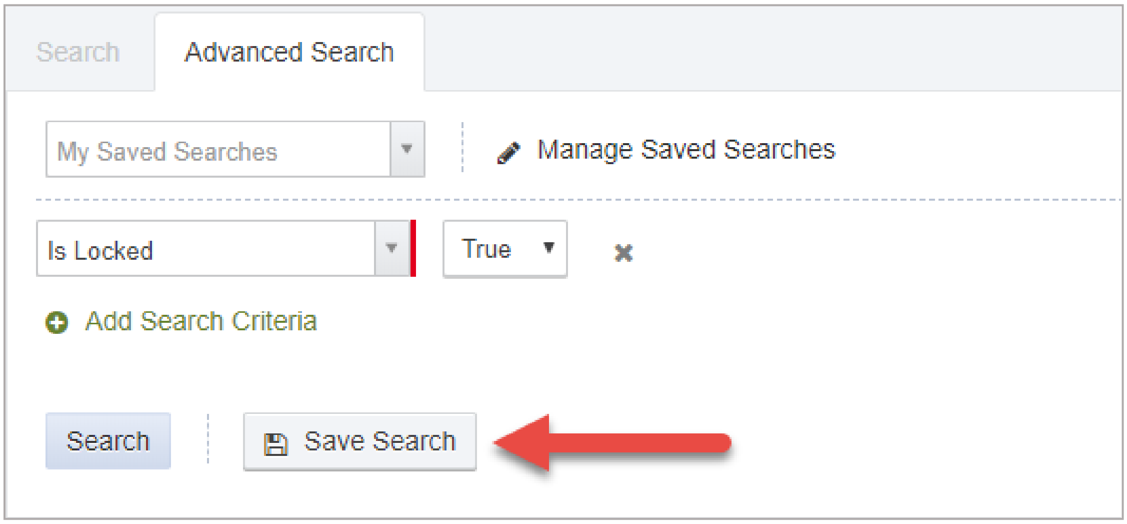
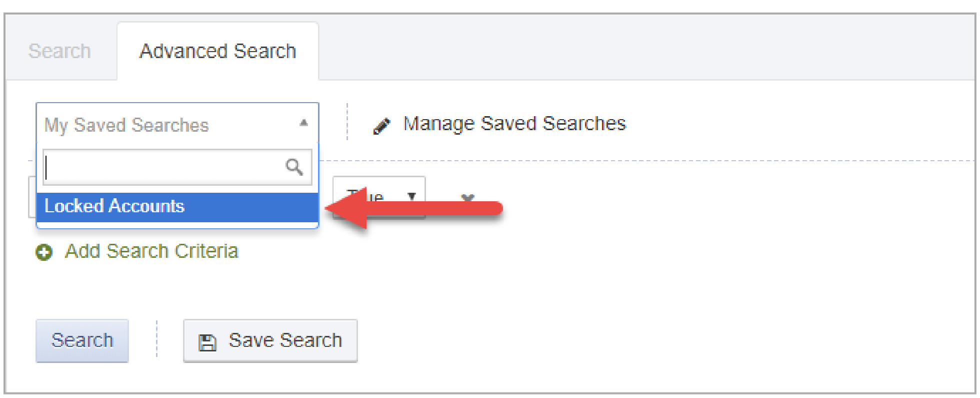


Figure 4-7: Advanced Search, Save Search

2. In the dialog box, type a name for this specific advanced search.

3. Click **Save**. Saved searched will be available in the field, “My Saved Searches”. These saved searches are only visible to the staff member who created them.



How to Set Up a New Staff Member Account

***Where:* Agency > Staff Members**

Follow the steps below to create a new staff account.

Note: Make sure you are in the correct agency location prior to creating a staff account.

1. On the left menu, click **Agency**, and then click **Staff Members**.
2. Click **Create New Staff Member**.

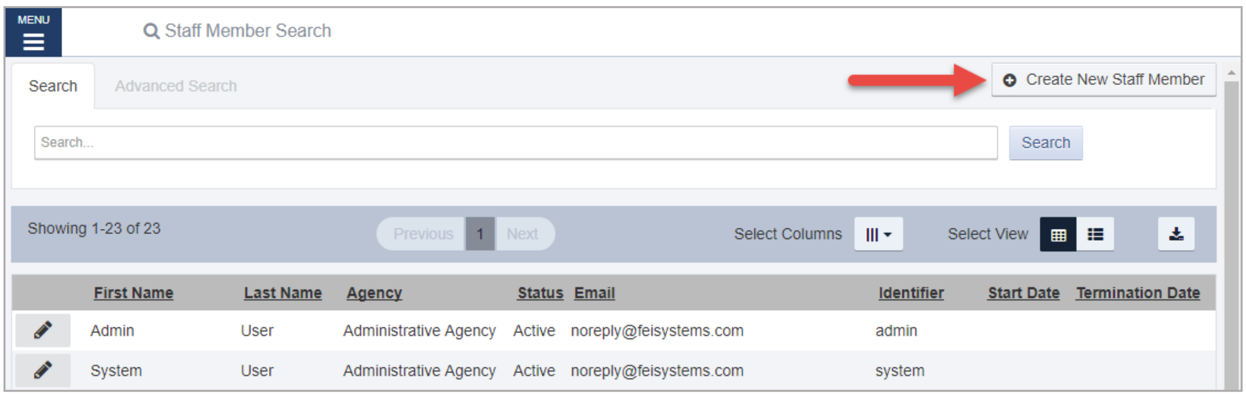


Figure 4-8: Staff Member screen

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 4-5: 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.

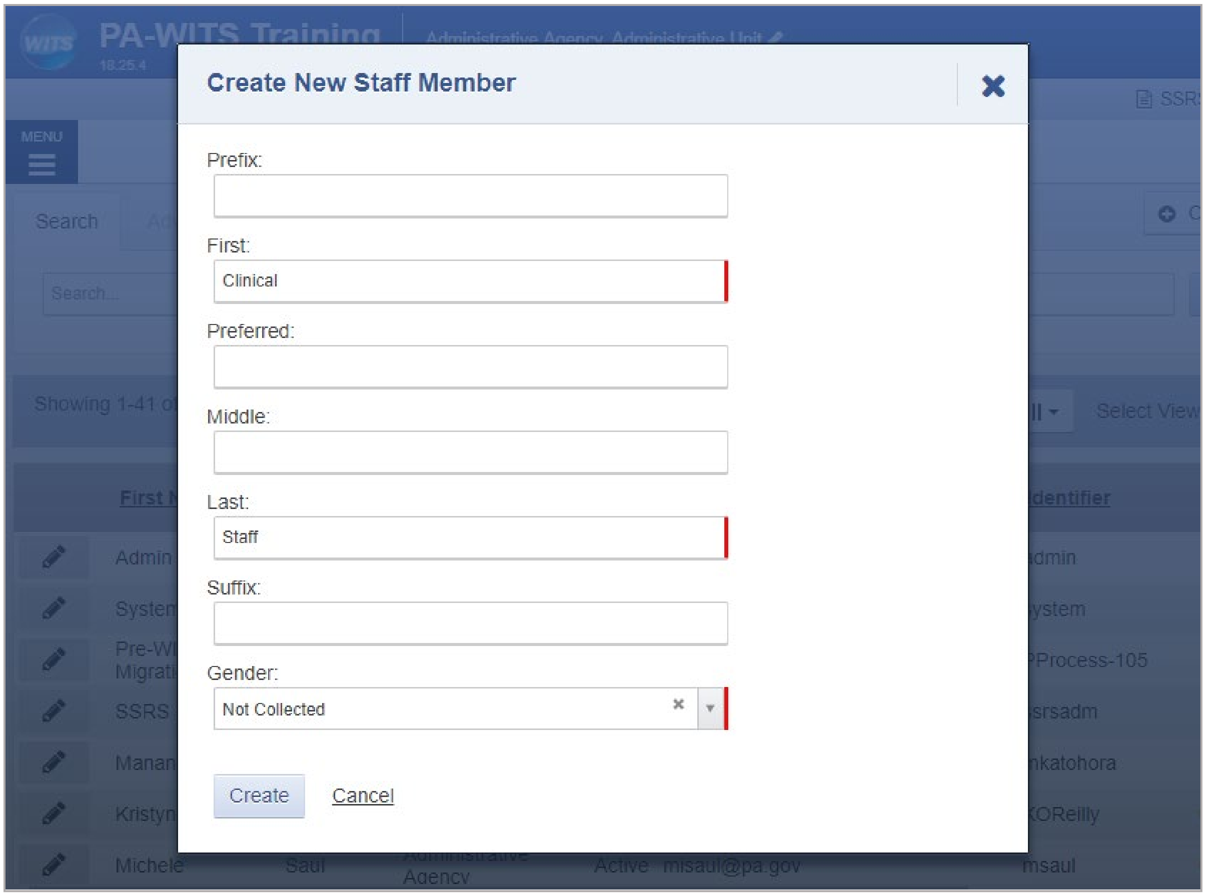


Figure 4-9: Create New Staff Member screen

4. Click **Create**. The system will redirect to the Staff Member Workspace screen.

Note: The Create button will only appear when all required fields have been completed.

Completion Requirements

On the Staff Member Workspace screen, note the Completion Requirements located on the right side. The completion requirements can be entered in any order.

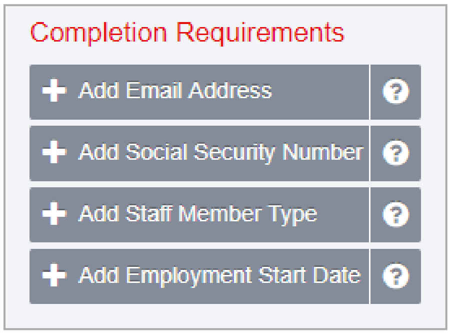


Figure 4-10: Completion Requirements

Add Email Address

1. On the Staff Member Workspace screen, point to the **Completion Requirements**.
2. Click **Add Email Address**. This will open the Contact Information panel.

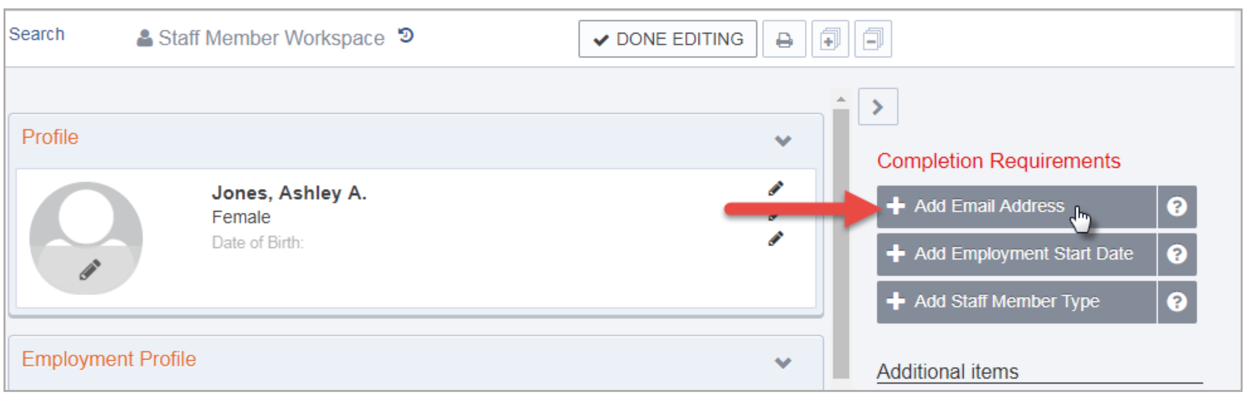


Figure 4-11: Completion Requirements, Add Employee Start Date

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

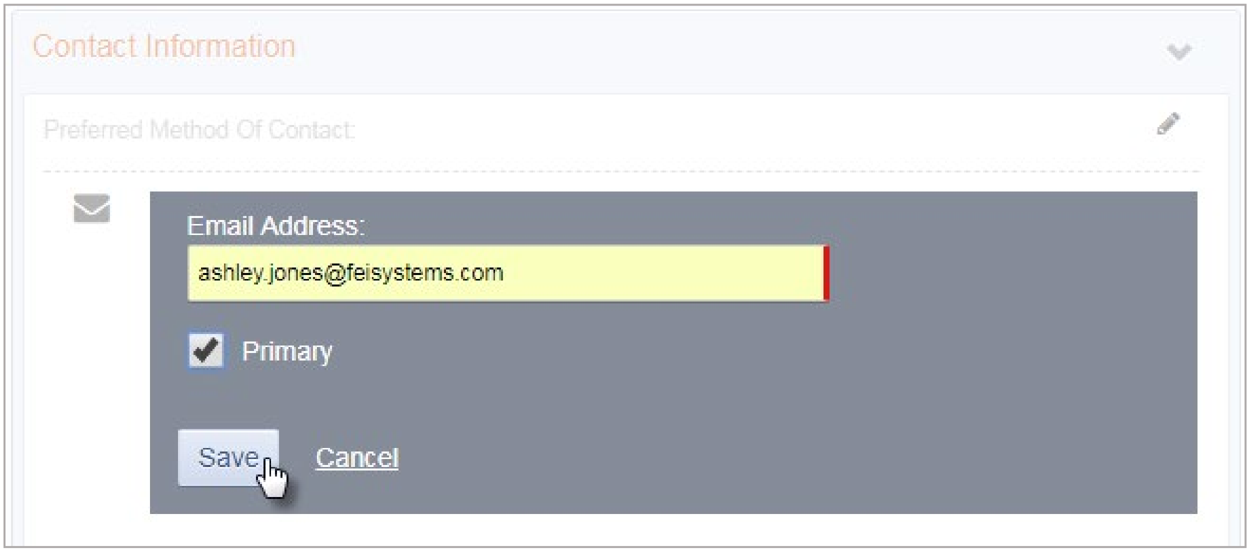


Figure 4-12: Contact Information panel, add primary email address

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.

Add Employment Start Date

1. On the Staff Member Workspace screen, point to the **Completion Requirements** and then click **Add Employment Start Date**. This will open the Employment Profile panel.

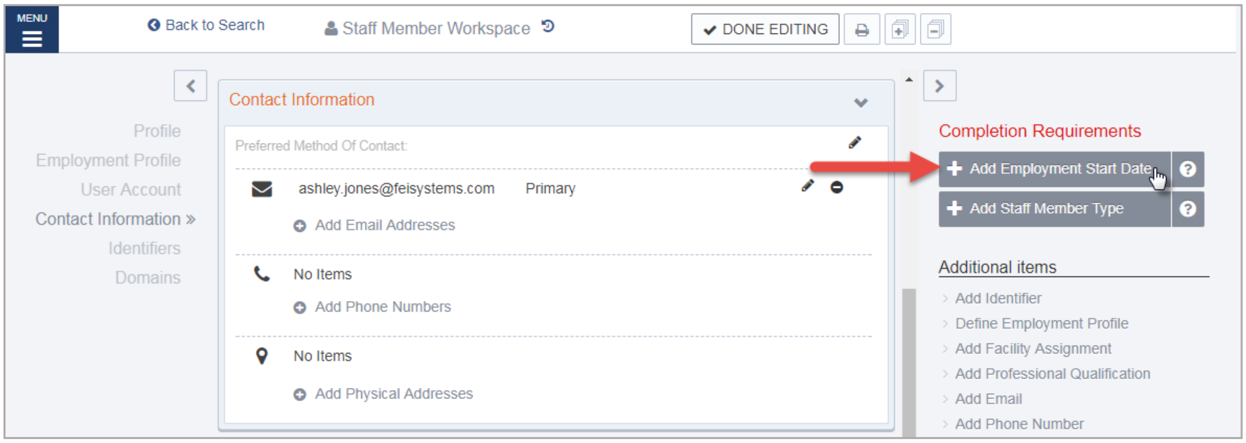


Figure 4-13: Add Employment Start Date

2. 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.

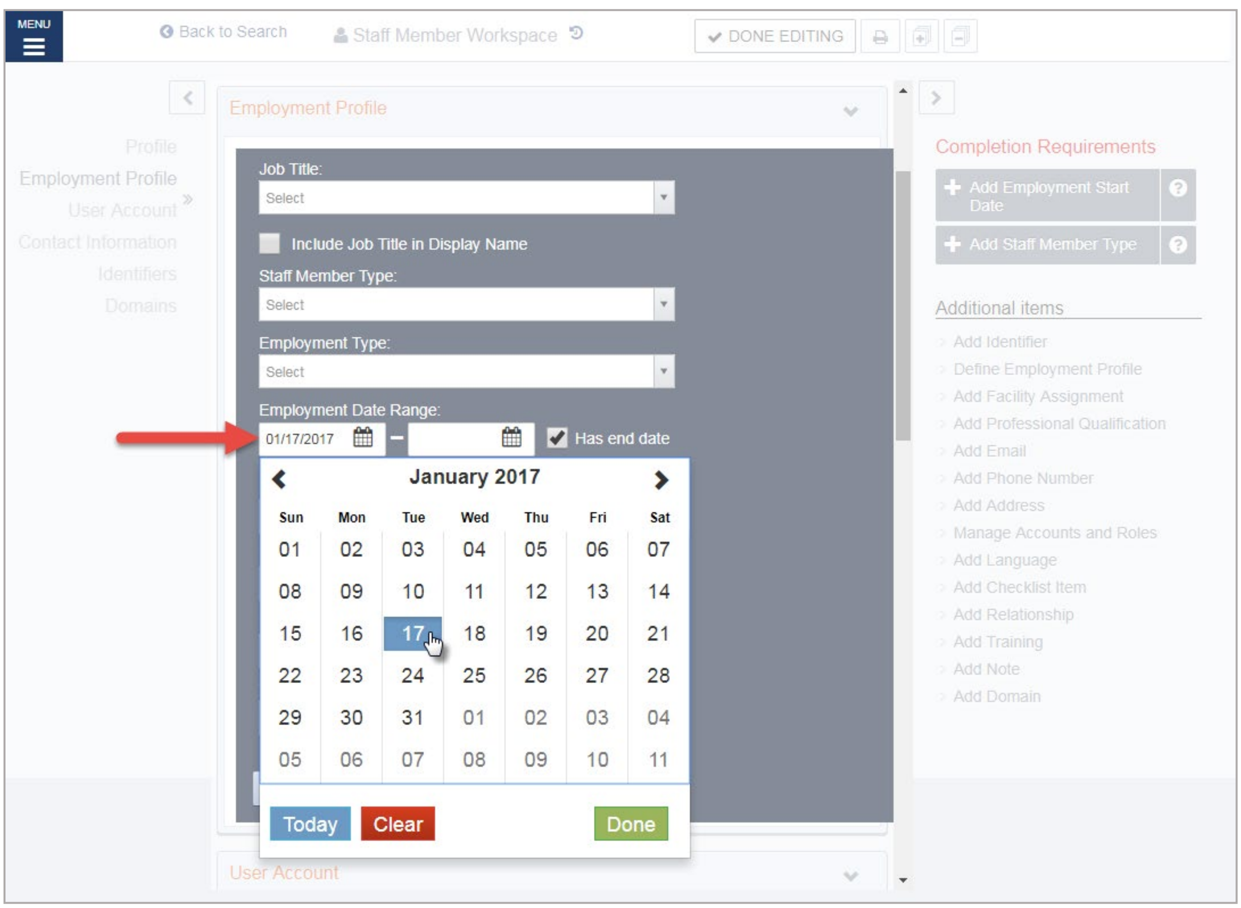


Figure 4-14: Employment Profile panel, Employment date range

Add Staff Member Type

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

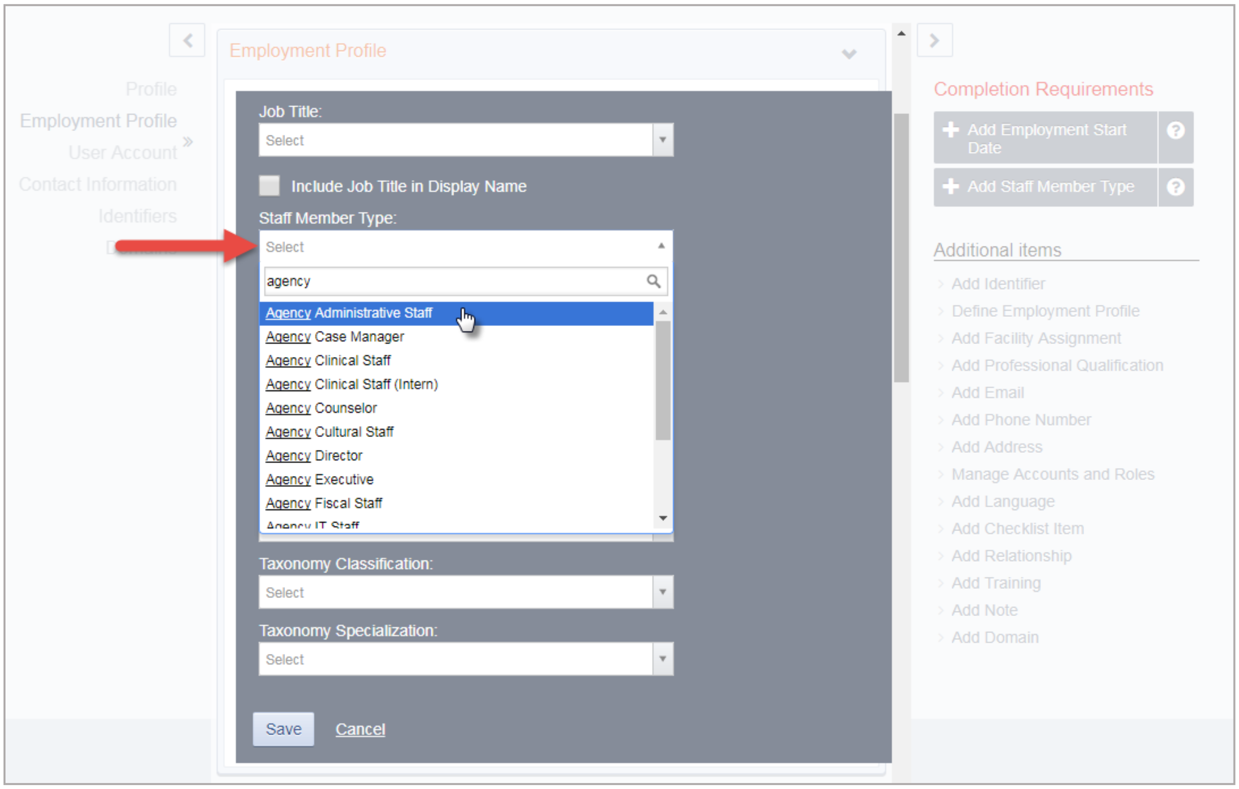


Figure 4-15: Employment Profile panel, Staff Member Type field

4. 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.

Add Social Security Number

1. On the Staff Member Workspace screen, point to the **Completion Requirements**.
2. Click **Add Social Security Number**. This will open the Identifiers panel.
3. On the Identifier Panel, in the **Identifier** field, enter the employee's SSN and then enter the effective date or use the calendar to select the start date.

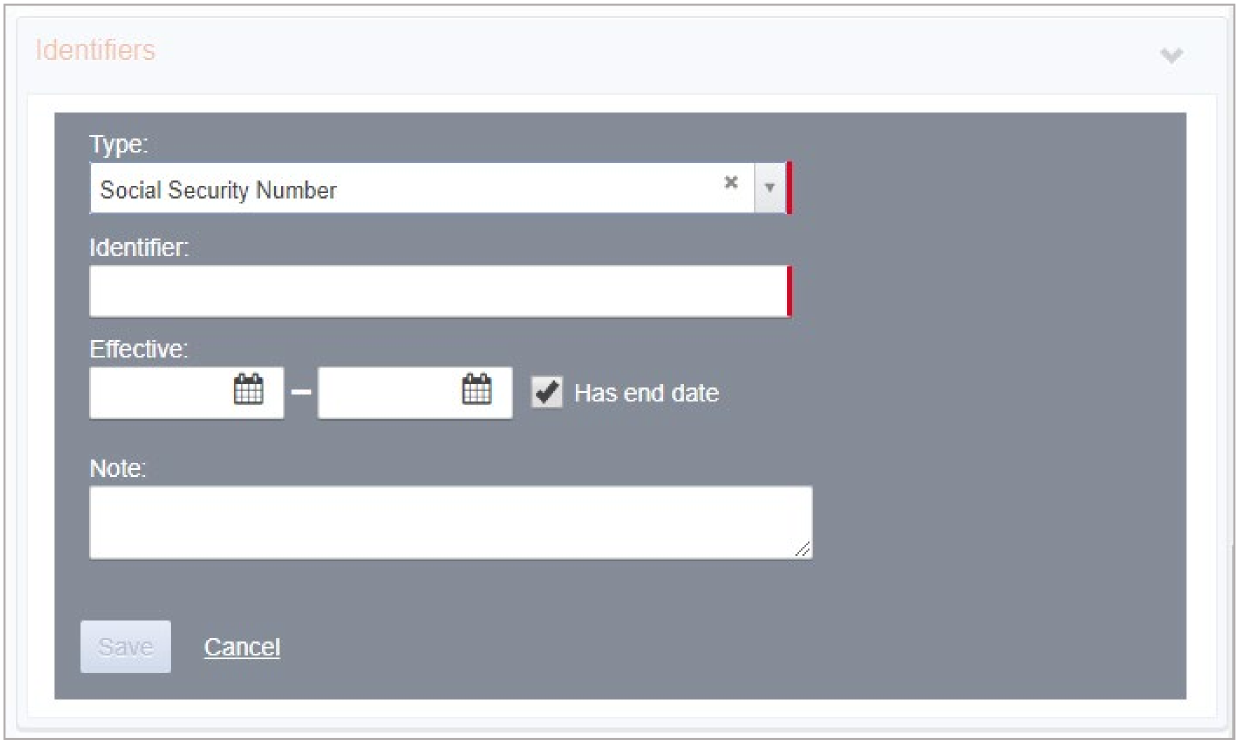


Figure 4-16: Identifiers panel

4. Click **Save**.

Add Facility Assignment

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

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

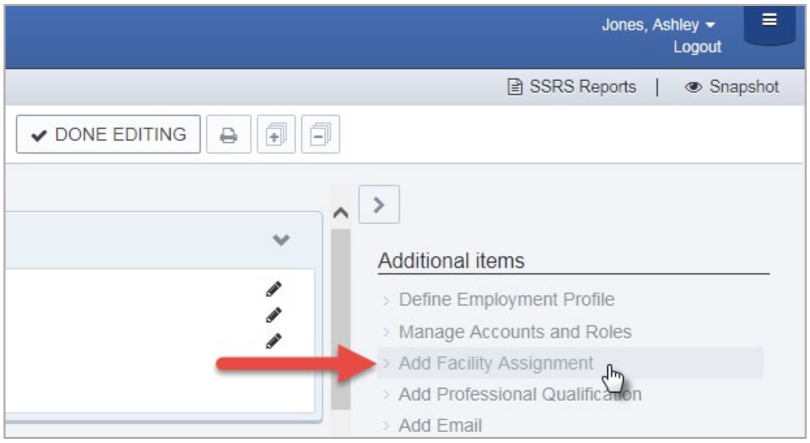


Figure 4-17: Additional Items section, Add Facility Assignment

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

3. Select the **Effective Date**.

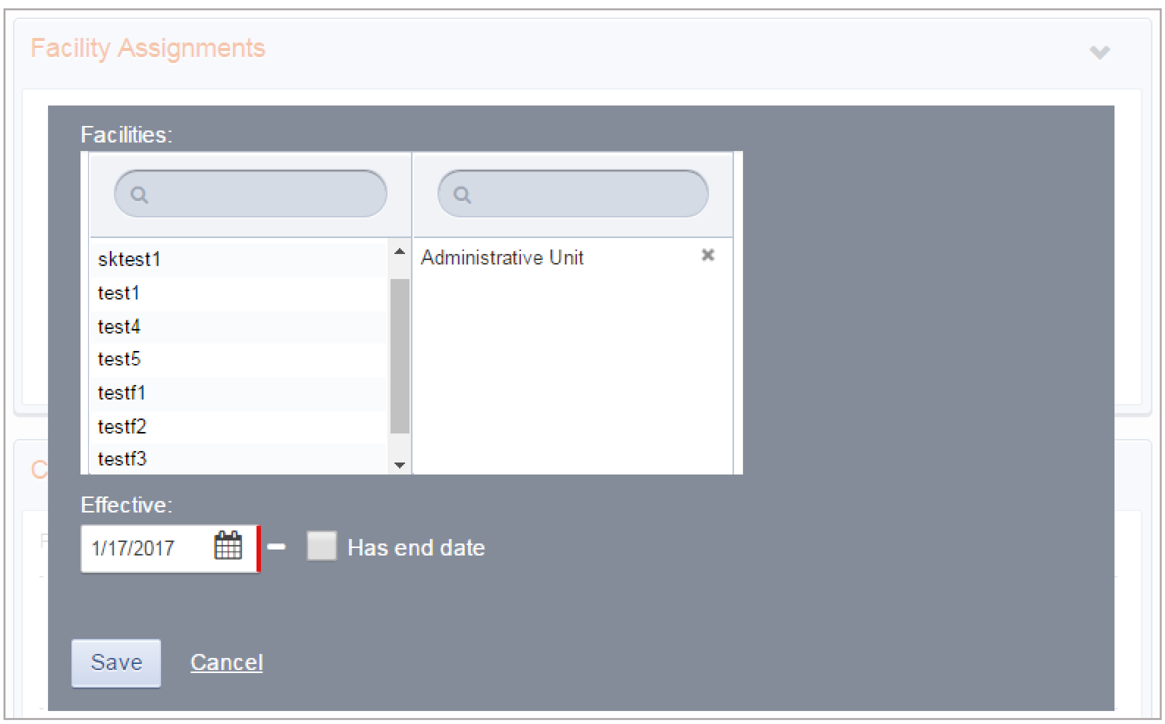


Figure 4-18: Facility Assignments panel

4. Click **Save**.

Add 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.

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

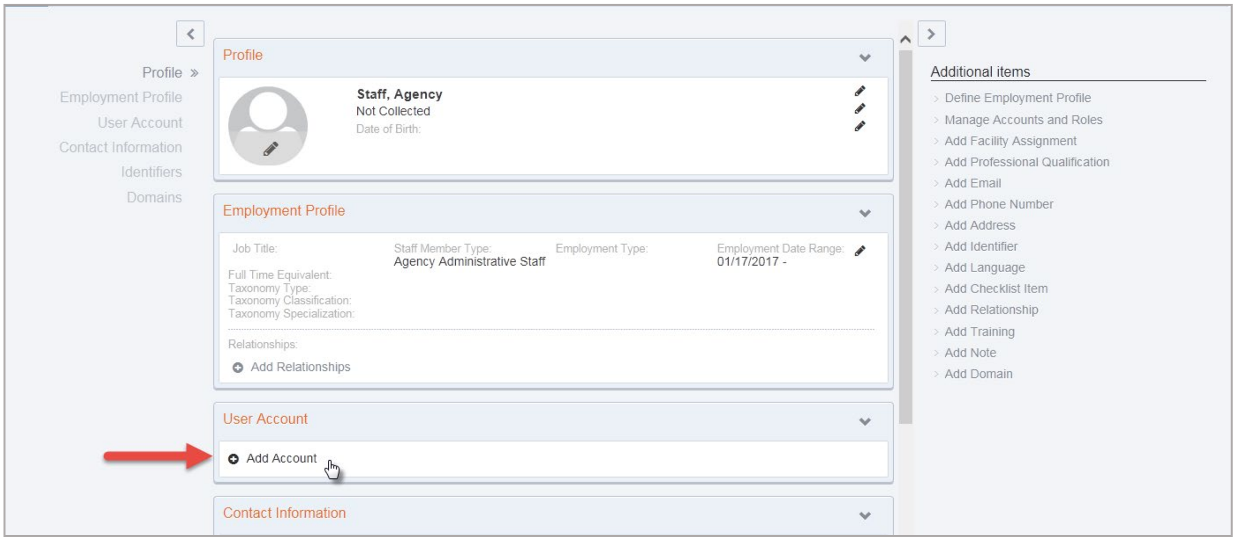


Figure 4-19: User Account panel, Add Account

2. In the **User ID** field, type the staff member's login name.

Important: The User ID must be unique for each staff member. Once an account is created, the User ID cannot be changed. If a User ID is set up incorrectly, please refer to, *Use Case: Correcting User ID* on page 58 below.

3. In the **Email Address** field, type the staff member's email address.

Important: WITS will send important login information using the email address provided in this section.

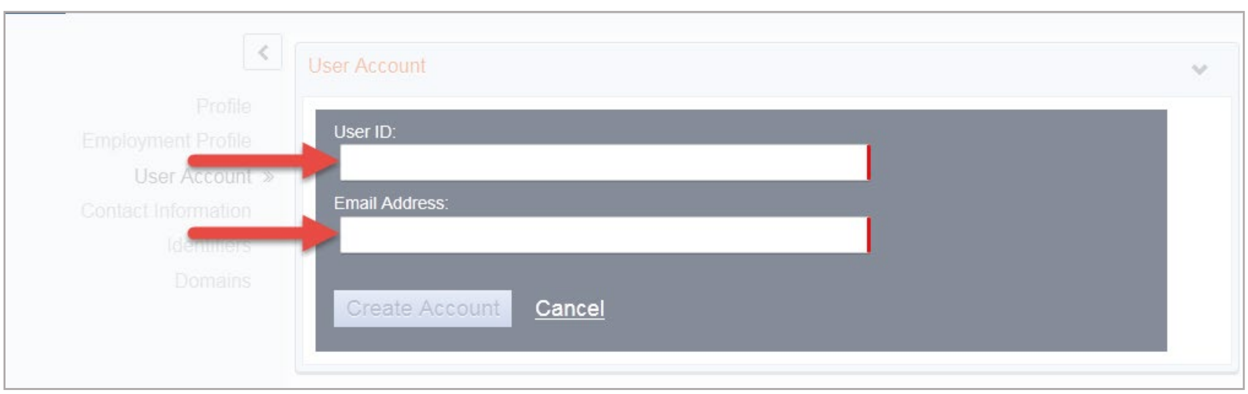


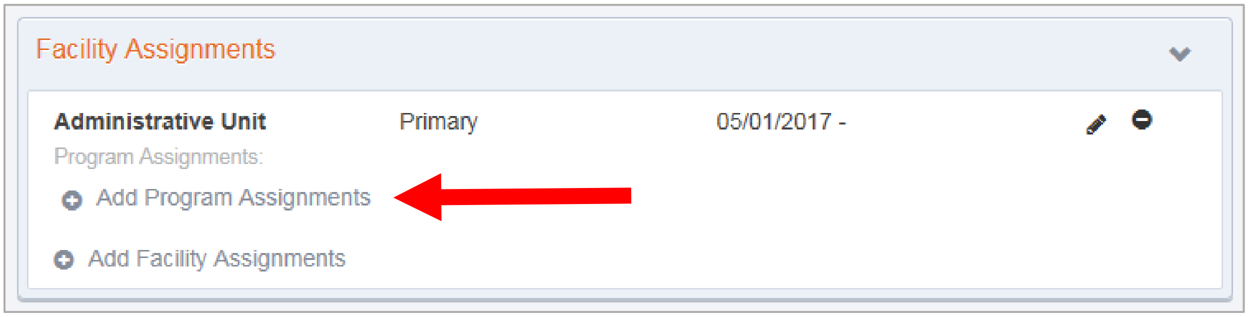
Figure 4-20: User Account panel, required fields

4. Click **Create Account**.

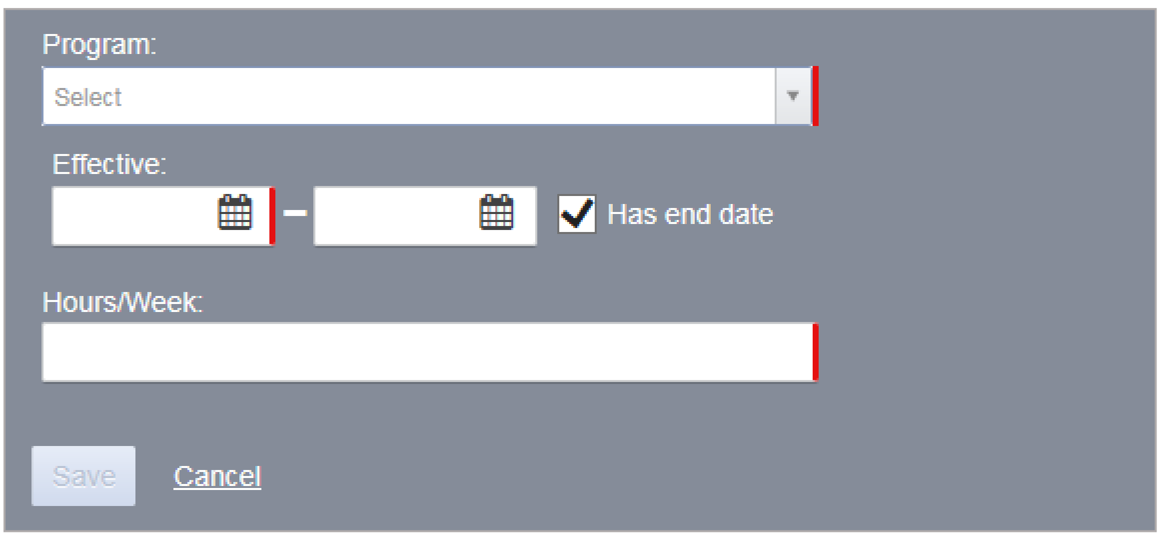
Add Program Assignment (Optional)

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.

1. Click **Add Program Assignments**.



2. Select a **Program** that the staff member should be assigned to
3. Enter the **Effective** date of the program assignment
4. Enter the number of **Hours/Week** the staff member will be assigned to that program.
5. Click **Save.**



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.

Table 4-6: SOR Related Roles

Role Name	Description
GPRA (Full Access)	User with this role can perform the minimum tasks related to data collection for discretionary grant. This applies only to instances using WITS only for SOR.
Clinical (Full)	User with this role can enter client data (profile, intake, consent, referral).
Reports Access	User with this role can access the WITS Reports from the left navigation.
Overdose Reversal Kits Management (Full Access)	User with this role can access the Overdose Reversal Kits Management section at the agency level. The user can view, add, edit and delete overdose reversal kits purchase, distribution and administration events.
Overdose Reversal Kits Management (Read-Only)	User with this role can access the Overdose Reversal Kits Management section at the agency level. The user can view overdose reversal kits purchase, distribution and administration events.

Assign User Roles

1. In the User Account panel, click **Manage roles**. *(Continue to next page)*

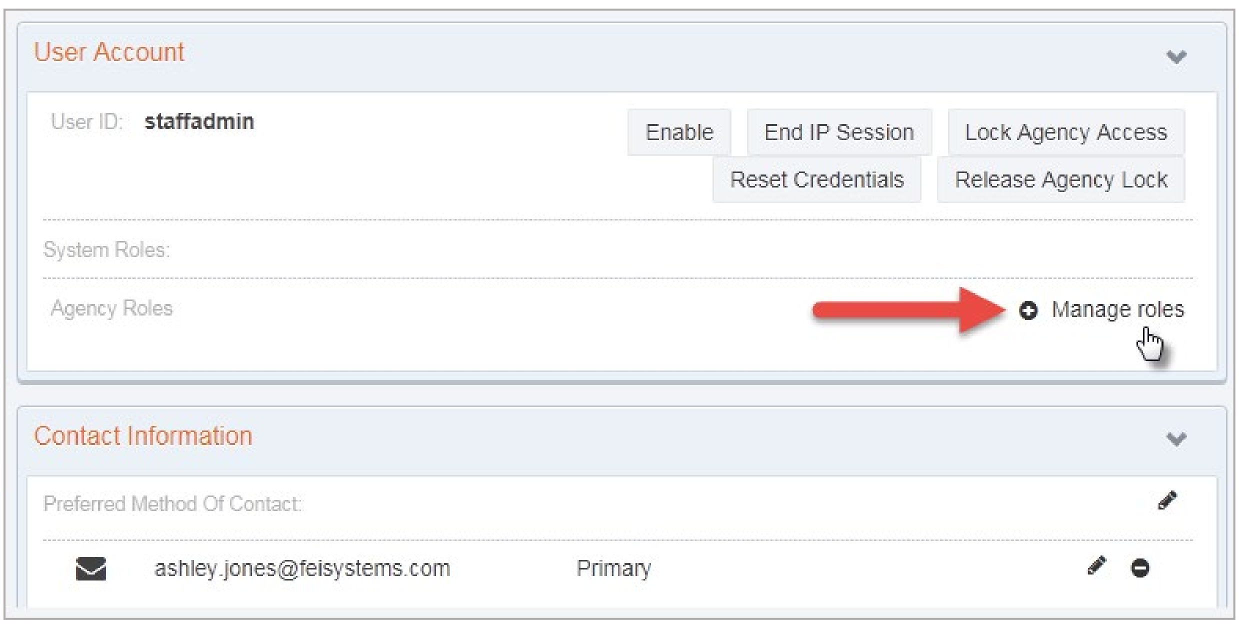


Figure 4-21: User Account panel, Manage Roles link

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 4-22 for additional information about features displayed on the Manage Roles screen.

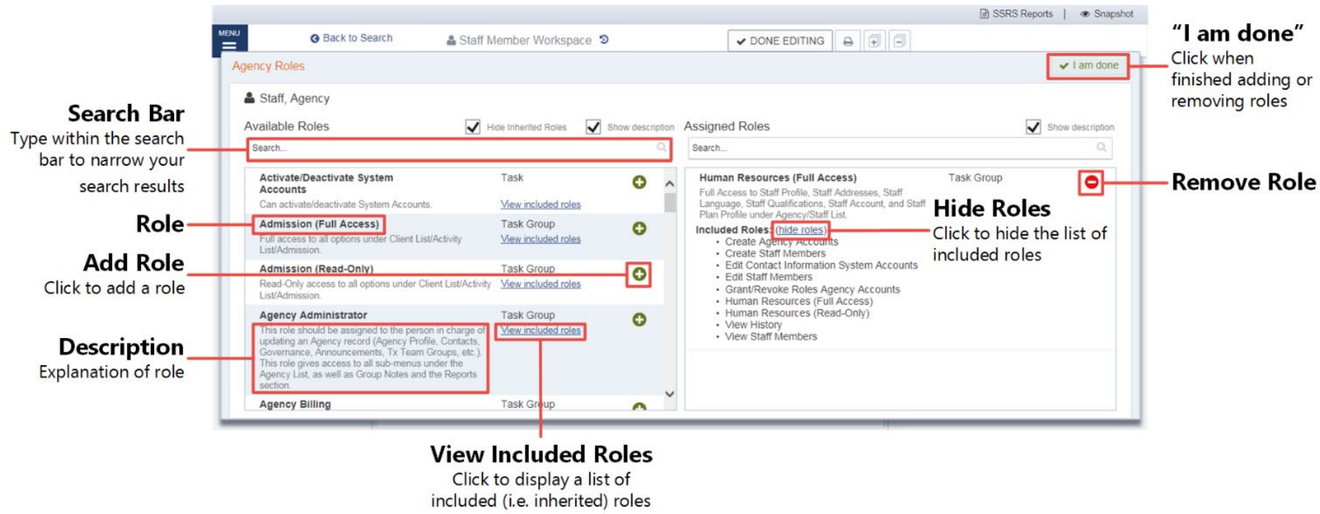
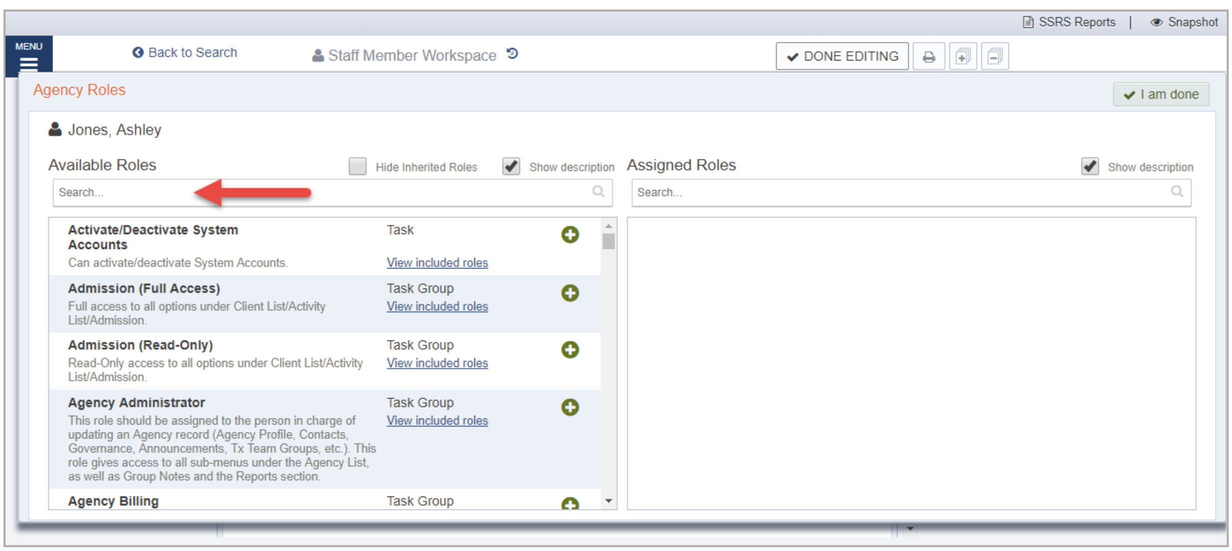


Figure 4-22: Manage Roles Screen

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



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

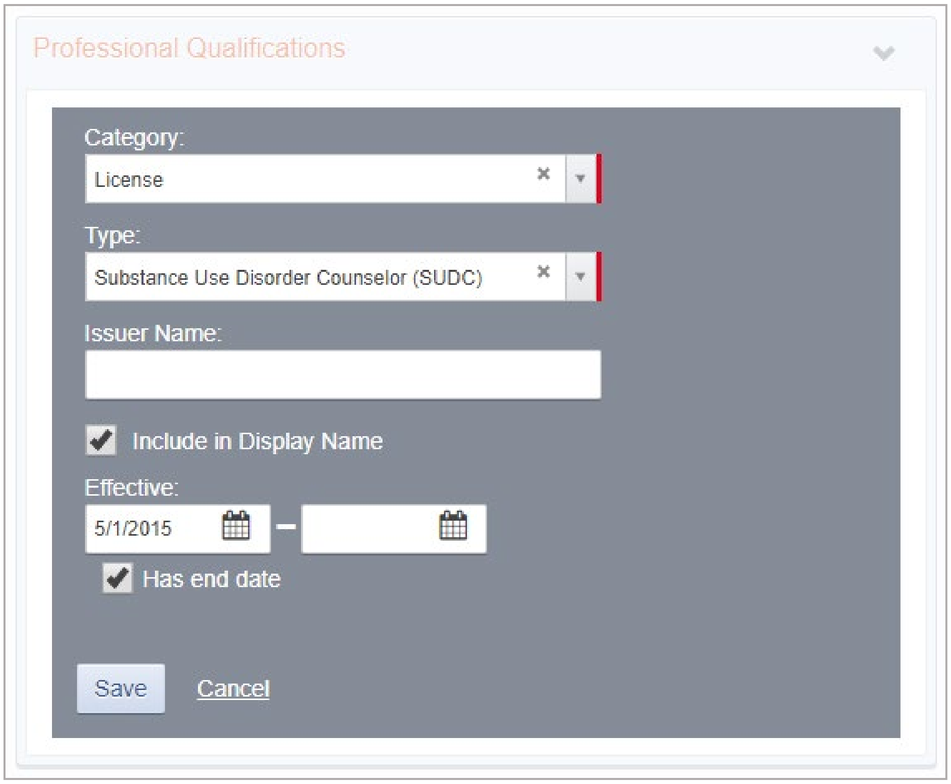
4. When finished assigning roles, click **I am done.**

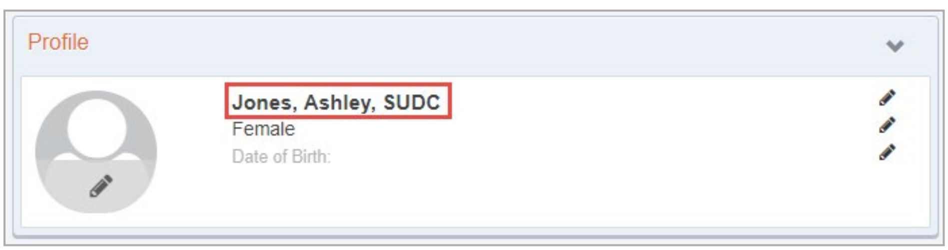
Adding additional items to a profile

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.





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.

Option 1: Staff Member Search Screen

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.

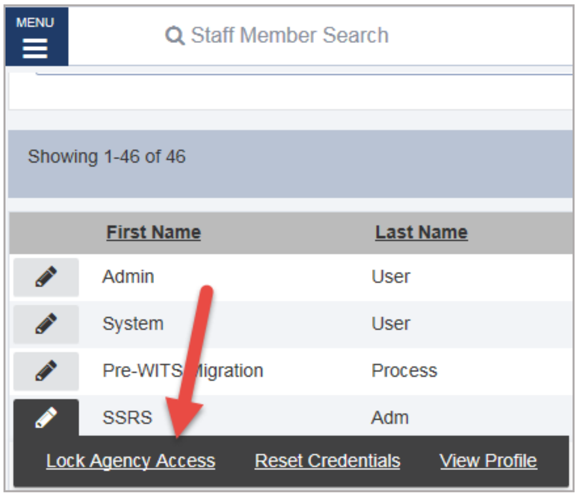
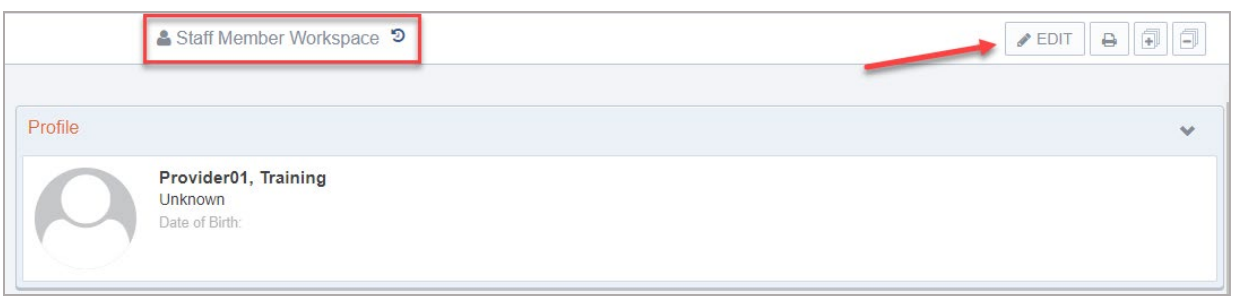


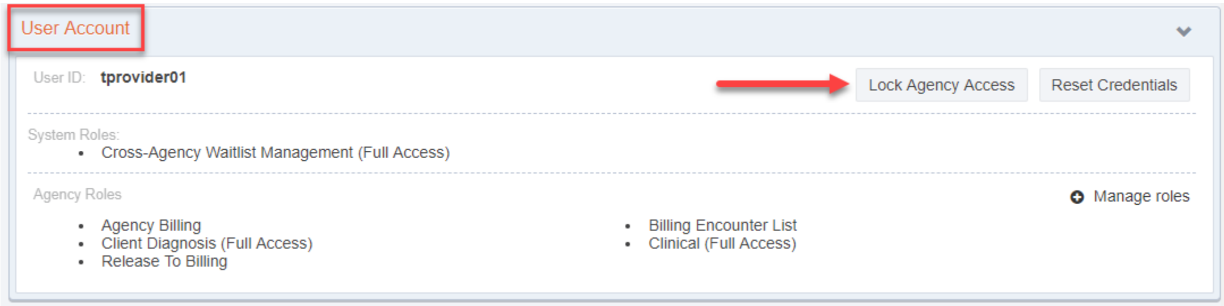
Figure 4-23: Staff Member Search Screen, Lock Agency Access

Option 2: Edit Staff Member Account

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

2. Click **Edit**.





5. When you select **Lock Agency Access** button, you are required to enter a Lock Reason. Enter a reason and click **Lock**.

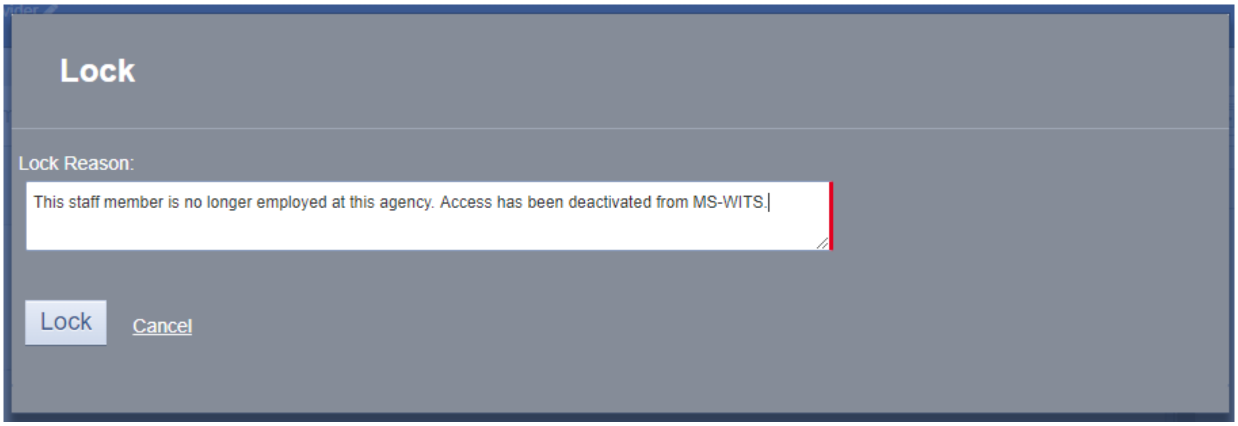
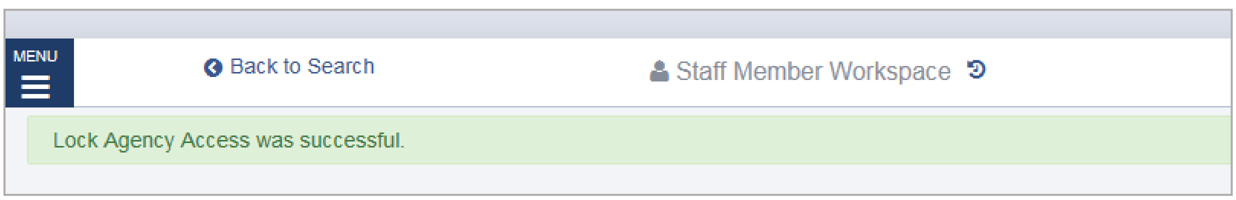


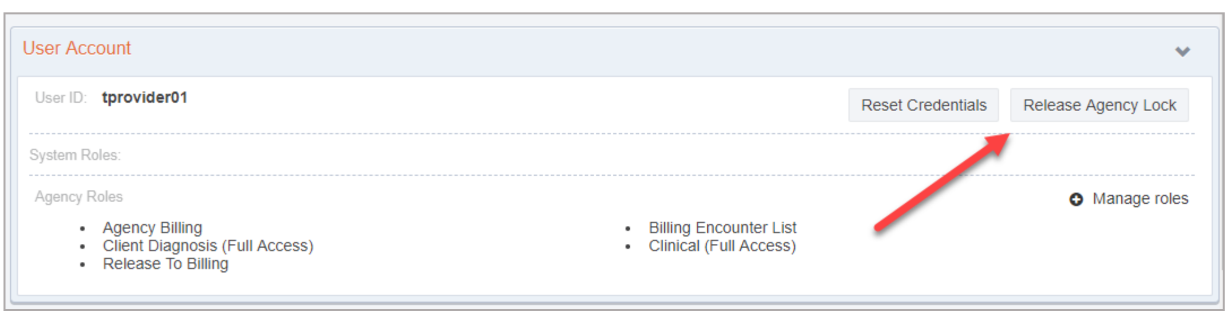
Figure 4-24: Lock Reason

6. When you click **Lock,** the user will see the "Lock Agency Access was successful" message at the top of the workspace.

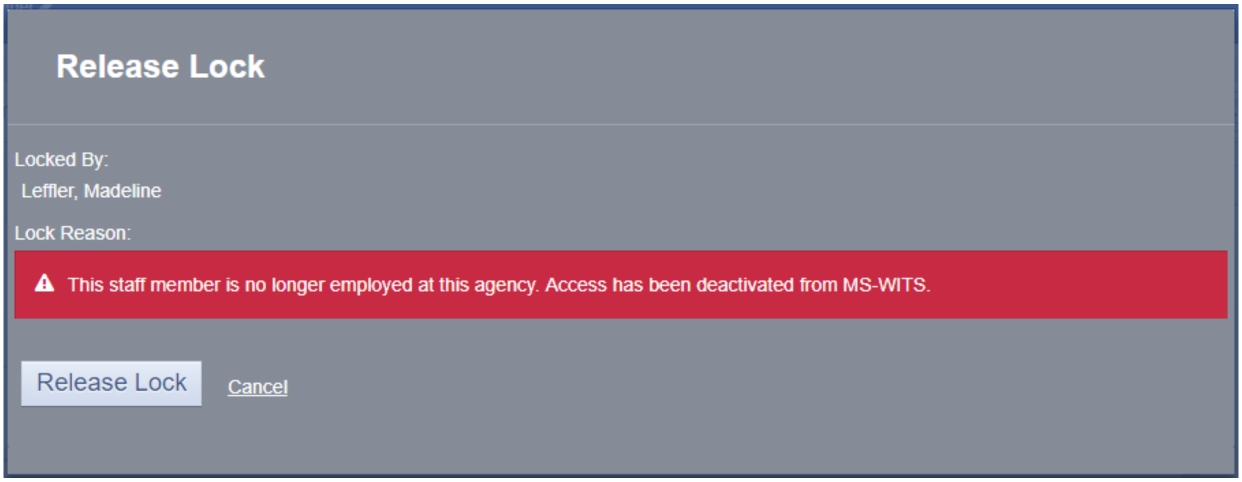


7. This staff member can no longer gain access to WITS.

8. 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**.

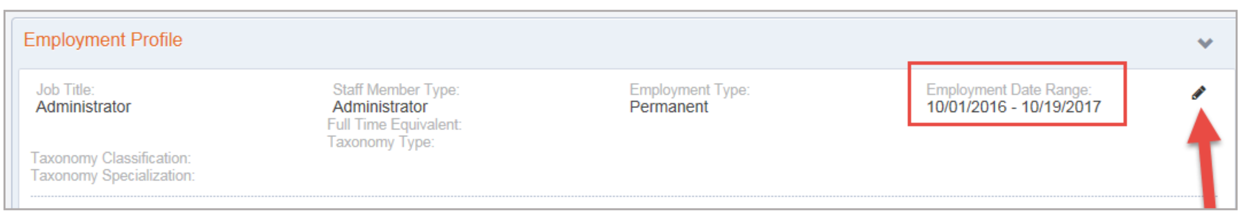


9. Release Lock window displays the Lock Reason that was entered in red, Staff Administrator can select the **Release Lock** action.



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

Note: When an individual is no longer working for an agency, a Staff Administrator can Staff Member Workspace and edit the Employment Profile panel and enter an 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.



Troubleshooting Help for Staff Management

Use Case: Account in Use

Message: "Your Account is Already in Use"

Solution: End IP System Session

There are two (2) options available to resolve this issue.

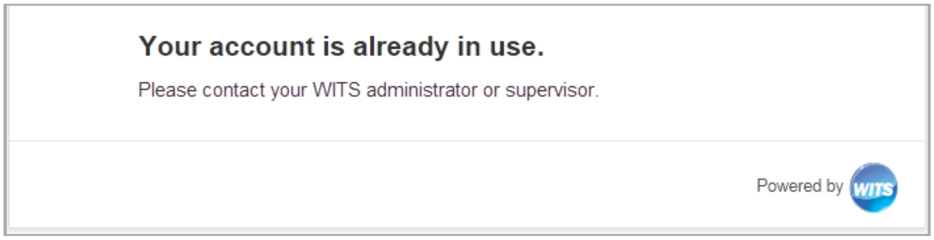


Figure 4-25: Account is already in use message

Option 1: Staff Members List

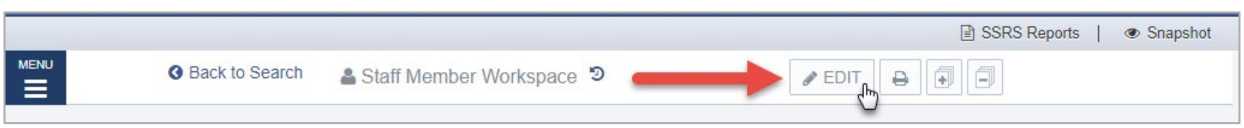
1. On the **Staff Members** list, locate the staff member, point to the pencil icon, and then click **End IP Session**.

2. Ask the staff member to try logging in again.

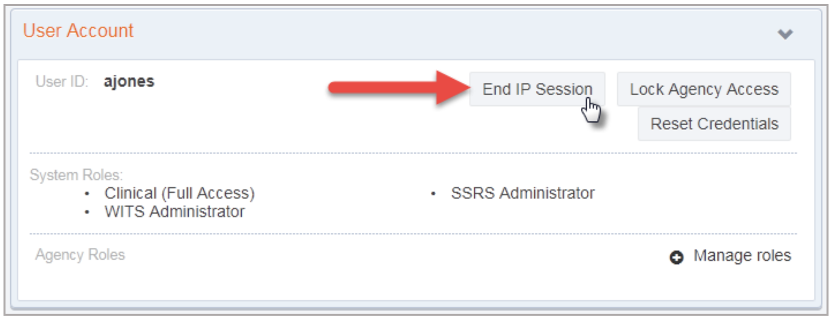
Option 2: Staff Member Profile

1. On the **Staff Members** list, locate the staff member, point to 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**.

5. Ask the staff member to try logging in again.

Use Case: Disabled Account

Message: "You Have Exceeded the Maximum Number of Log-in Attempts"

Solution: Enable account

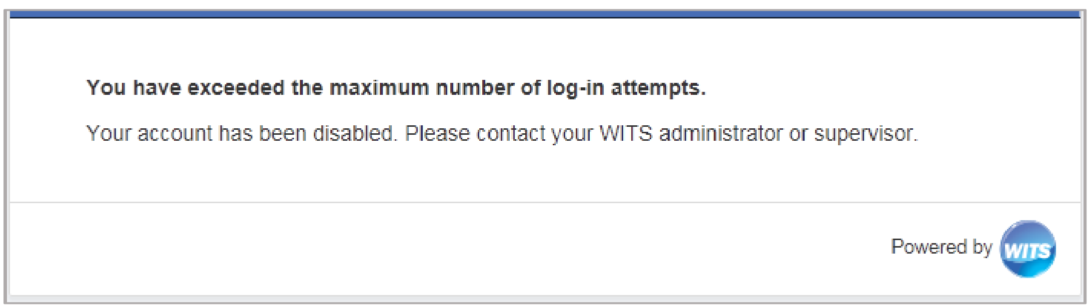
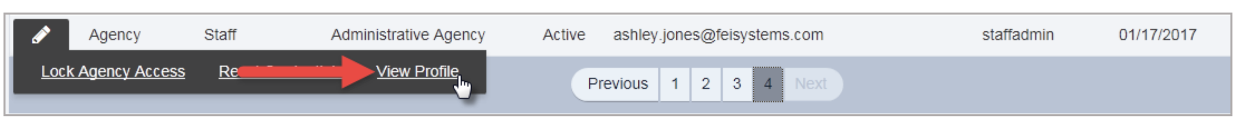
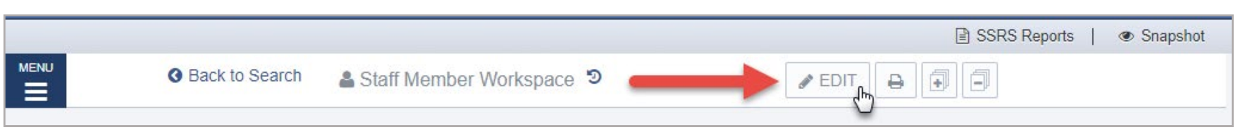


Figure 4-26: You Have Exceeded the Maximum Number of Log-in Attempts

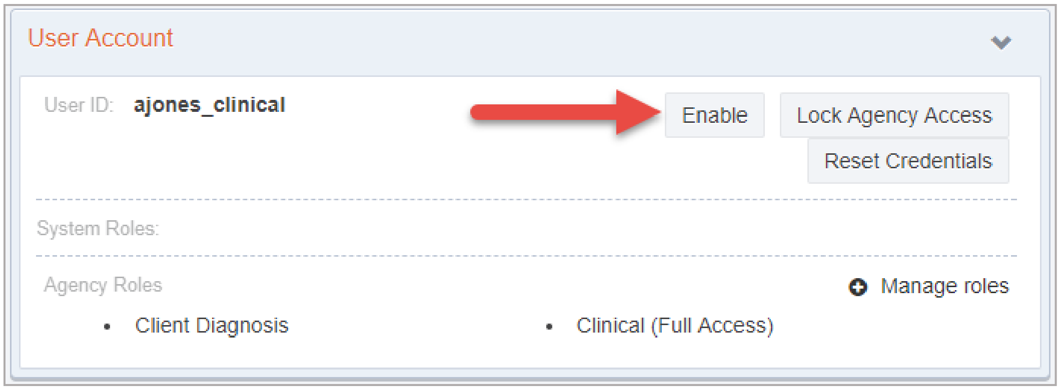
1. On the **Staff Members** list, locate the staff member, point to the pencil icon, and then click **View Profile**.



2. Click **Edit**.



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


User Account
User ID: ajones_clinical
Enable
Lock Agency Access
Reset Credentials
System Roles:
Agency Roles
Manage roles
Client Diagnosis
Clinical (Full Access)

Use Case: Reset Credentials Link Expired

Message: "Your Reset Credentials Link Has Expired"

Solution: Reset Credentials

There are two (2) options available to resolve this issue.

Figure 4-27: Your reset credentials link has expired

Note: When resetting credentials, the staff member will 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.

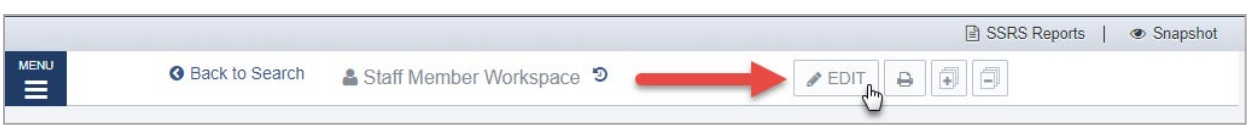
Option 1: Staff Members List

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

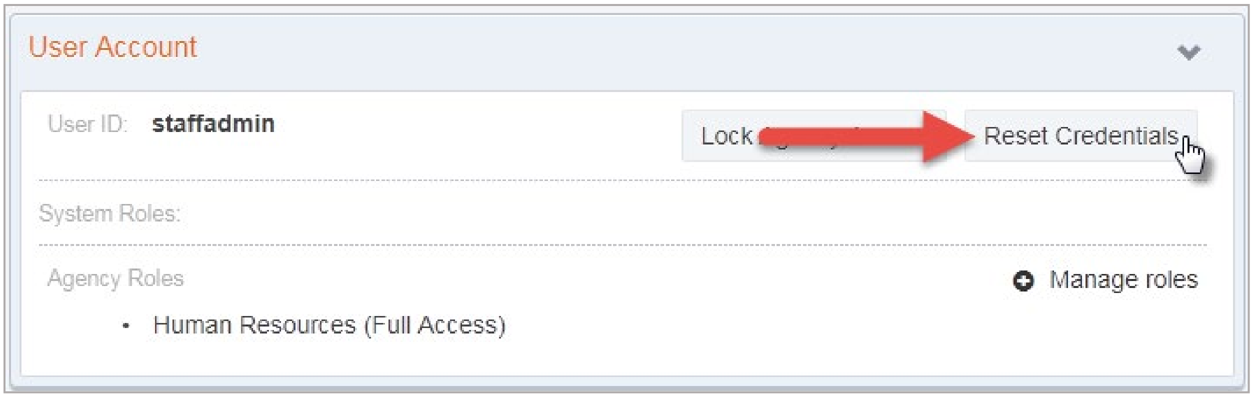
Option 2: Staff Member Profile

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

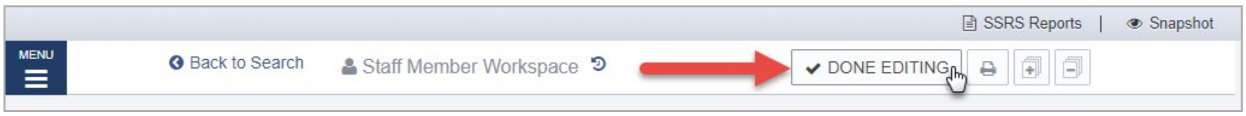
2. Click **Edit**.



3. In the User Account panel, click **Reset Credentials**.



4. Click **Done Editing**.



Use Case: 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.