pennsylvania
DEPARTMENT OF DRUG AND ALCOHOL PROGRAMS

PA WITS

Prevention Staff Administrator Guide

Applies to:

PA WITS Version 22.3.0+

PA DDAP

Last Updated May 2023

Preface

Prevention PA WITS is a web-based application specifically designed for organizations to manage their Prevention programs effectively.

Intended Audience

This user guide has been prepared for designated **Staff Administrators** in Prevention Planning Agencies (Single County Authorities) and Direct Service Providers. Topics covered include creating user accounts, assigning appropriate system roles, and troubleshooting Tier 1 level user issues.

System Requirements

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

Internet Browsers

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

- Microsoft Edge
- Google Chrome
- Mozilla Firefox
- Apple Safari

NOTE: When resetting PA WITS account credentials, be sure to remove any prior saved Passwords from the browser settings. Failing to do so may cause the browser to substitute the older login info upon hitting **"Submit"** and the login attempt will fail.

Pop-up Blocker

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

Customer Resources

PA WITS Training Material Website: Contains links to user guides and other useful system information. https://www.ddap.pa.gov/Training/Pages/DataSystem_Training.aspx

PA WITS Support Structure: Details below. Overview of the PA WITS problem reporting structure that describes the proper procedures to report various types of user issues.

PA WITS Help Desk: Email: RA-DAPAWITS@pa.gov
Phone: 717 736-7459 (M-F 8:00 am–4:00 pm)

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

PA WITS Support Structure

This section describes the various levels of the support available to users, and the types of issues each level is responsible for addressing.

Tier 1 Support: PA WITS Agency/Staff Administrator at SCA or Provider

- Champion PA WITS at your organization

- Create new staff accounts, reset passwords, lock/unlock accounts, change user account permissions

- Have a solid understanding of PA WITS screens, business rules, and processes; be able to help users with any usability issue that is covered in PA-WITS training manuals or other available user and system documentation

- Address user issues during normal operation hours

- Ensure users review and complete the on-demand self-service training at: (https://www.ddap.pa.gov/Training/Pages/DataSystem_Training.aspx). **Please note:** While the steps in these videos are still accurate for PA WITS functionality wise, the appearance of the screens will be different due to the user interface update.

- Escalate system errors or complex issues to **PA WITS Service Desk** (Tier 2 Support)

Tier 2 Support: DDAP, PA WITS Service Desk

- Available Monday-Friday, 8 AM – 4:00 PM (except on State Holidays) to answer calls or emails from the SCA or Provider's **Tier 1** support designee.

- Email: RA-DAPAWITS@pa.gov

- Phone: 717-736-7459

- Work with SCA or Provider's Agency or Staff Administrator to see the issue through to resolution. If the problem cannot be resolved, DDAP will escalate the issue to Tier 3 support.

Tier 3 Support: FEi Systems

The **PA WITS Service Desk** will work with the vendor, Fei Systems, to address issues not resolved at the Tier 1 or 2 levels, and to address other system defects or availability issues.

Table of Contents

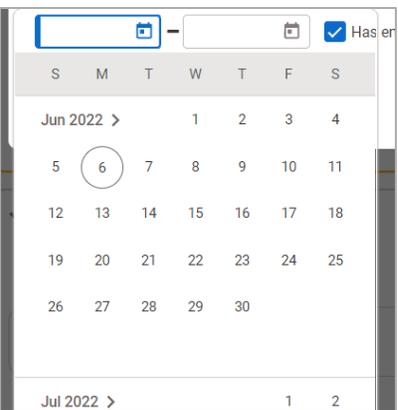# Part I: Staff Administration Overview

As **Staff Administrator** your role is to create and manage staff accounts. This means setting up new employees and granting them the proper permissions in their user profiles to control their access to facilities and screens through role assignments, as well as resetting passwords and troubleshooting login problems.

Staff Member List

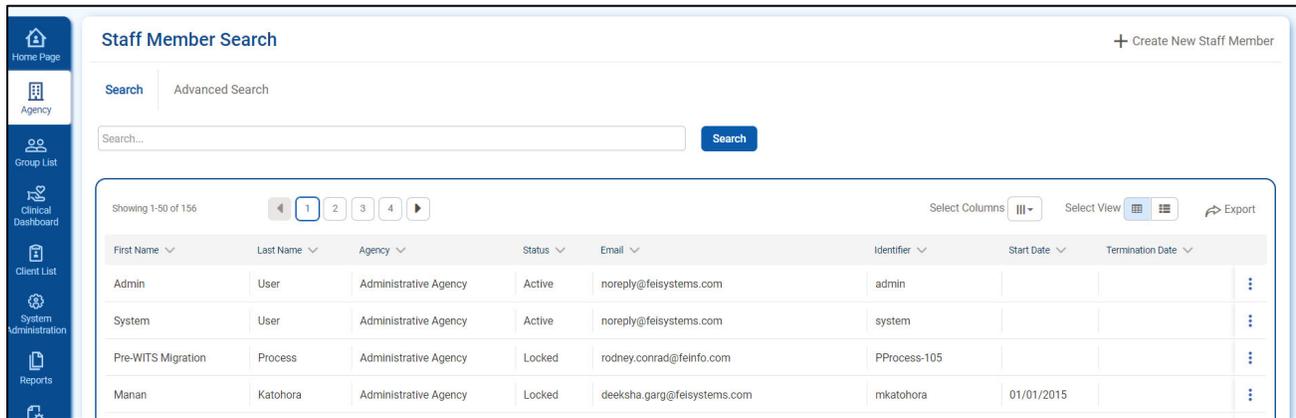The below tables describe icons you will encounter when managing user accounts.

Staff Member System Icons

Icon	Description	Icon	Description
+ Add	**Add**: Allows the user to add data to the panel or section.	✏ Edit	**Edit**: Allows the user to edit information on a panel or section.
(history icon)	**History**: Allows the user to view the changes made on the current page.	↪ Export	**Export**: Allows the user to export results.
Select View ⊞ ☰	**View**: Presents data in a table or a panel format.	‖▼	**Column Selector**: Allows the user to select the columns that they would like to view.

Icon	Description
⊗ Error ✕	**Error Message**: The error message is localized and is generated where the error occurred.
First Name (field with orange bar)	**Required Field**: Has a solid orange/gold bar to the left of the field. User must enter data to save.
Suffix (field)	**Discretionary Field**: Is not a mandatory field to complete the panel and will not affect the completion or saving of a record.
◄ 1 2 3 4 ►	**Pages**: Allows the user to page through all search results.
(Date picker calendar Jun 2022 – Jul 2022)	**Date Picker**: Allows the user to pick a date from a calendar.

Staff Member Search

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"**).


Types of Prevention Users

When creating a **New Staff Member User Account** (instructions below), various roles may be granted to the staff member that dictate their system access levels. When deciding role assignments, 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 PA WITS. **Staff Administrators** can create PA WITS user accounts for their agency's staff members by following the instructions outlined in the section, "**How to Setup a New Staff Account**".

Agency Oversight Permission

PA WITS provides **Agency Oversight Permission** that enables a user at the SCA to enter data on behalf of a contracted provider. If an SCA requires access to create staff accounts or enter prevention services on behalf of a contracted provider (Direct Service Provider); the SCA Agency Staff Administrator may contact the PA WITS Service Desk to request the **Agency Oversight Permission**. **Please Note: Agency Oversight Permission** cannot be given for a provider that contracts for prevention services with more than one SCA.

Provider Agency Staff Administrator

A Staff Administrator User Account has been created for your agency with the roles **Staff Administrator** and **SSRS Cross Agency Reader**. With these roles, the **Staff Administrator** can create/manage staff members, run reports and troubleshoot service entry issues for your staff. For additional **Staff Administrator Accounts** or to have the System Level **SSRS Cross Agency Reader** role added to a user account, please contact the **PA WITS Service Desk**.
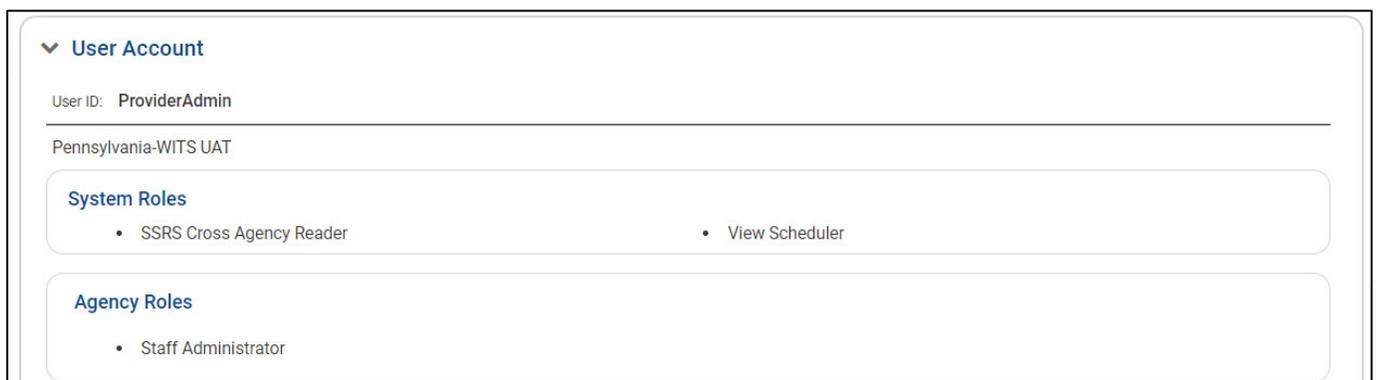
SCA Prevention Staff - Planning

This **User Account** should be set up with the role **Prevention Plan (Full Access).** This role will allow users to create and submit **Prevention Plans**.

SCA and Provider Prevention Staff - Implementation

This account can be created for staff who will only be entering services for programs that are already implemented. The **User Account** should be created with **no roles assigned**.

Part 2: Creating User Accounts for SSRS Reporting

What is SSRS?

PA WITS uses Microsoft® SQL Server® Reporting Services (SSRS) 2016 and Microsoft® SQL Server® 2016 Report Builder 3.0 as the primary reporting and analytics tool for PA WITS. SSRS is a web-based application allowing the development, storage, and generation of user-generated reports on data collected directly in PA WITS, in real time.

Users with SSRS roles will be able to view the **SSRS Reports** link located at the top right section in PA WITS. Clicking the **SSRS Reports** link will then open **SSRS Web Portal** in a new browser tab.
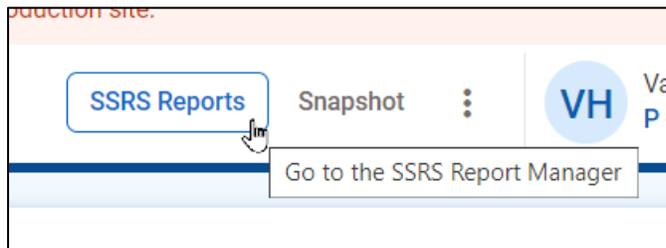
Provider Report Access

Prevention Provider **Staff Administrators** have been granted access to reports in PA WITS. If report subscriptions do not meet the needs of your users, **Staff Administrators** may contact the PA WITS Service Desk at RA-DAPAWITS@pa.gov to request SSRS access for additional users or submit other reporting questions.

SCA Report Access

SCA Staff Administrators can assign the **SSRS Agency Reader** or **SSRS Agency User** roles to staff that require access to reports in PA WITS. The **SSRS Agency Reader** role will allow users to run existing reports created by DDAP (recommended role).

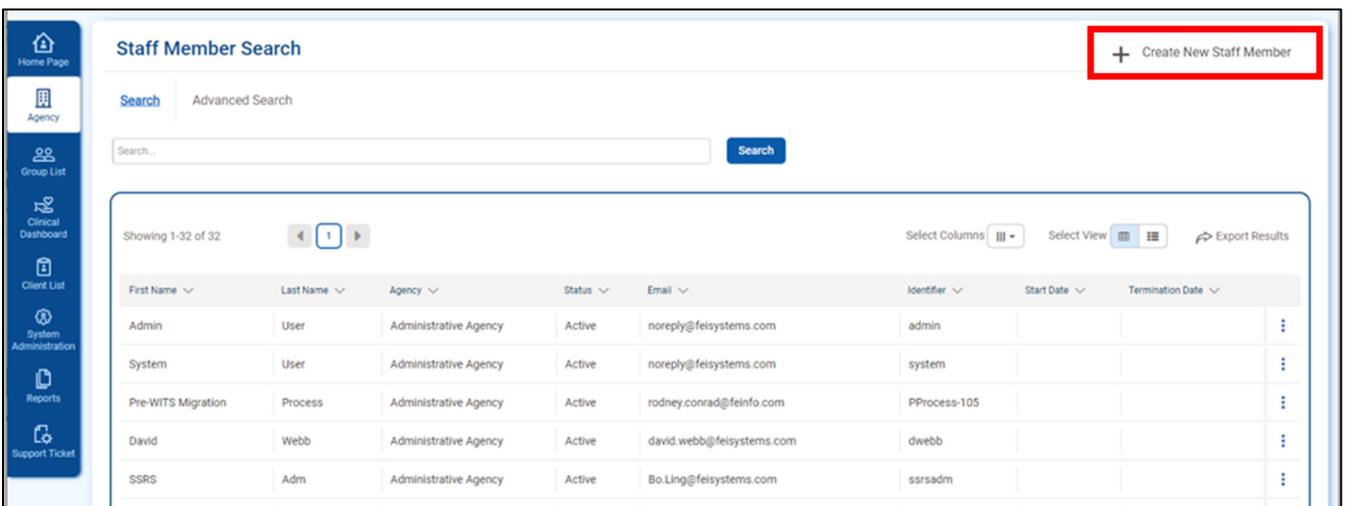**Example:** County Staff with the ability to run reports (**SSRS Agency Reader**).
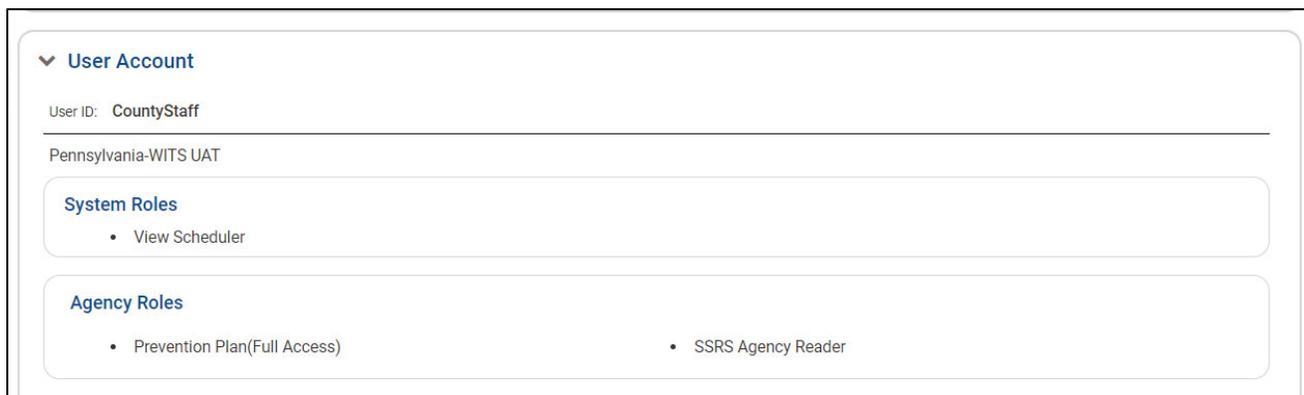
Create New Staff Member

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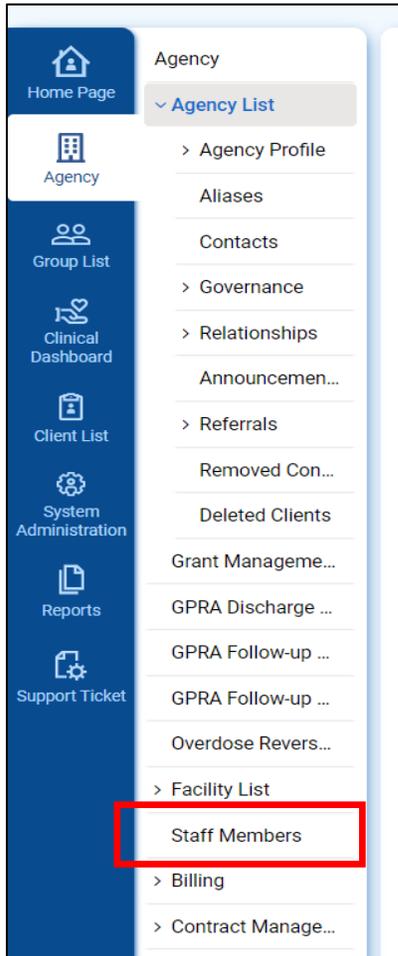
2. Click the **+Create New Staff Member** link.

Staff Member screen

3. On the **Create New Staff Member** screen, complete at least the required fields. Required fields are indicated by a solid orange/gold bar to the left of the field.

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 Not Collected from the dropdown list.

Add Staff Member   ✕

Prefix

[   ]

First

[Jason   ]

Preferred

[   ]

Middle

[   ]

Last

[Booker   ]

Suffix

[   ]

Gender

[Not Collected   ✕ ▾]

[**Save**]   [✕ Cancel]

4.   Click **Save**.

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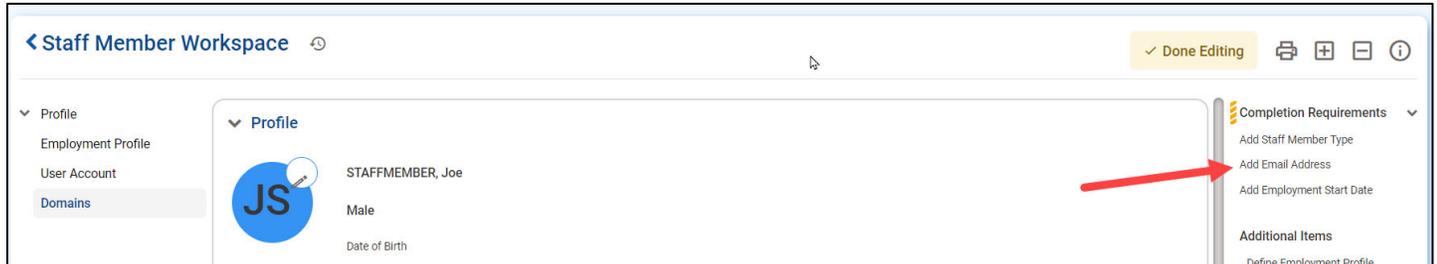
7. On the **Contact Information** panel, type the staff member's email address, check the **Primary** box and then click **Save**.
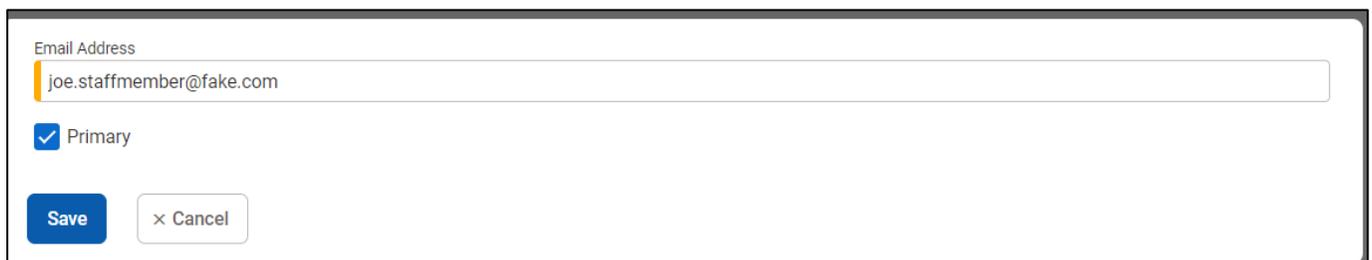
Add Employment Start Date

8. On the right side, point to the **Completion Requirements** and then click **Add Employment Start Date**. This will open the **Employment Profile** panel.
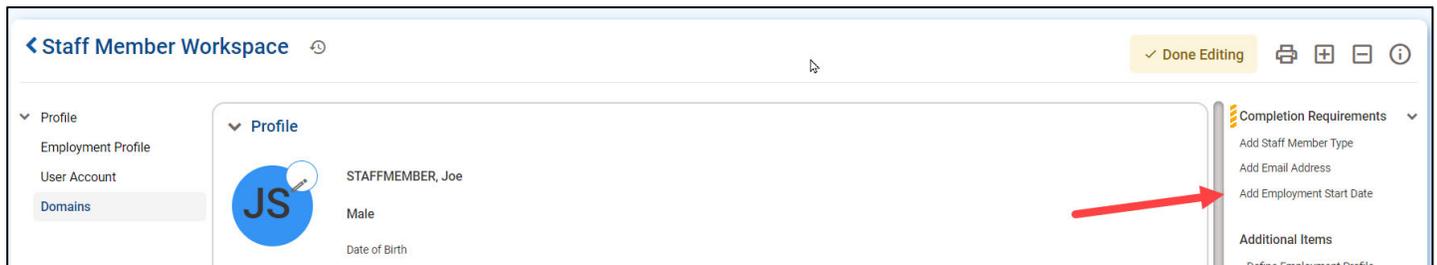
9. On the **Employment Profile**, choose **"Administrative Staff"** from the **"Staff Member Type"** dropdown menu.

10. Enter the employee's start date or use the calendar to choose it in the **Employment Date Range** field. Click **Save.**

Job Title

☐ Include Job Title in Display Name

Staff Member Type

Administrative Staff

Employment Type

Employment Date Range

| 6/1/2022 📅 | — | 📅 | ☑ Has end date |

S	M	T	W	T	F	S
Jun 2022 >			**1**	2	3	4
5	6	7	8	9	10	11
12	13	14	15	16	17	18
19	20	21	22	23	24	25
26	27	28	29	30		
Jul 2022 >					1	2

Create User Account

Once a **Facility Assignment** is established and other items in the **Completed Requirements** sections have been met, a user account will be created for the staff member.

11. In the **User Account** panel, click **Add Account**.
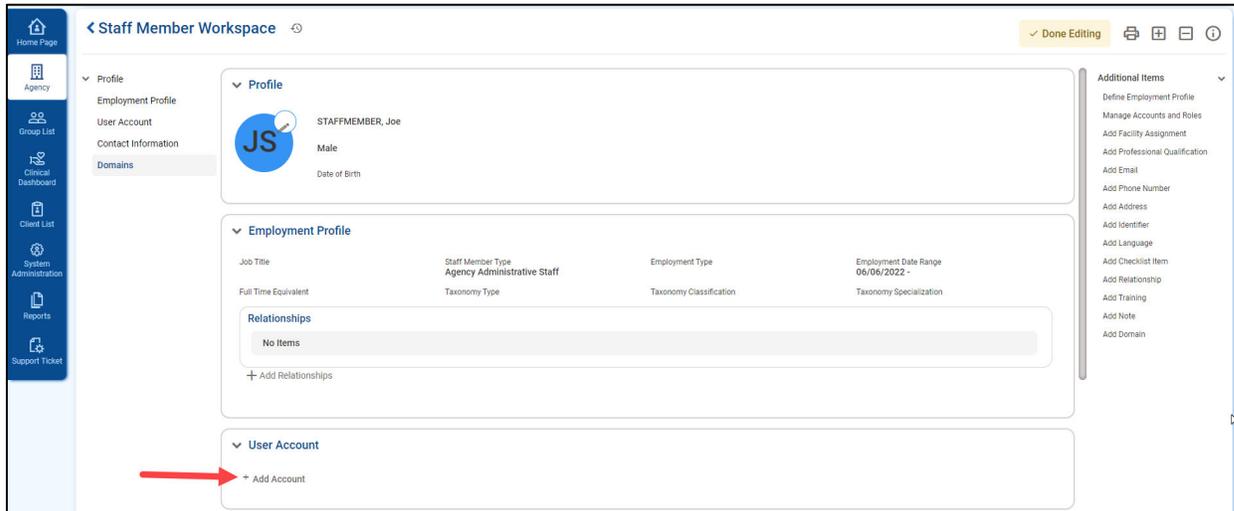
12. In the **User ID** field, establish a staff member's login name.

Note: The User ID must be unique in the overall system. i.e. If you had a User Account at another agency, you will not be able to use the same User ID as you had there.

13. Click **Create Account**. PA WITS will send important login information to the user's designated email containing the **User ID**.
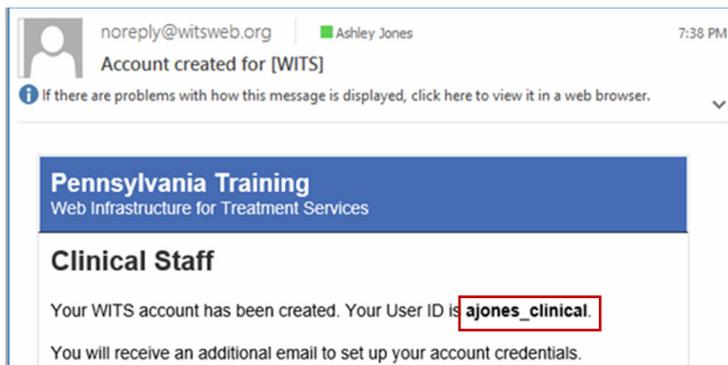
Add Facility Assignment

PA WITS requires each staff be assigned to at least one facility to set the user's accesses when logging into the system. If the user is not assigned to a Facility they will be unable to enter services.

14. Point to the **Additional items** section, and then click **Add Facility Assignment**.
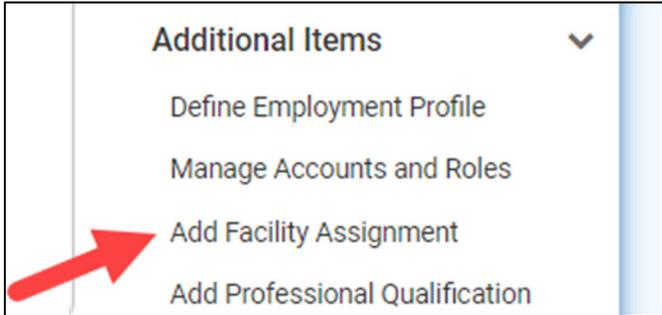
15. In the **Facility Assignments** section:

    For SCAs: click on the first available **ATOD Prevention** facility. If your organization is a joinder (an SCA servicing more than one county), choose the **ATOD Prevention** facility for the county that is listed first in your SCA Agency's name. Only select one Facility.

    For Providers: click on the only available Facility showing, it will be the same as your Agency Name.

16. Select the **Effective Date**.

17. Click **Save**.

Assign User Roles

Manage Roles Screen: User Interface

There are two panels on the **Manage Roles** screen. The left panel displays a list of all **Available Roles**, the right panel displays a list of the roles already assigned to the user's account.
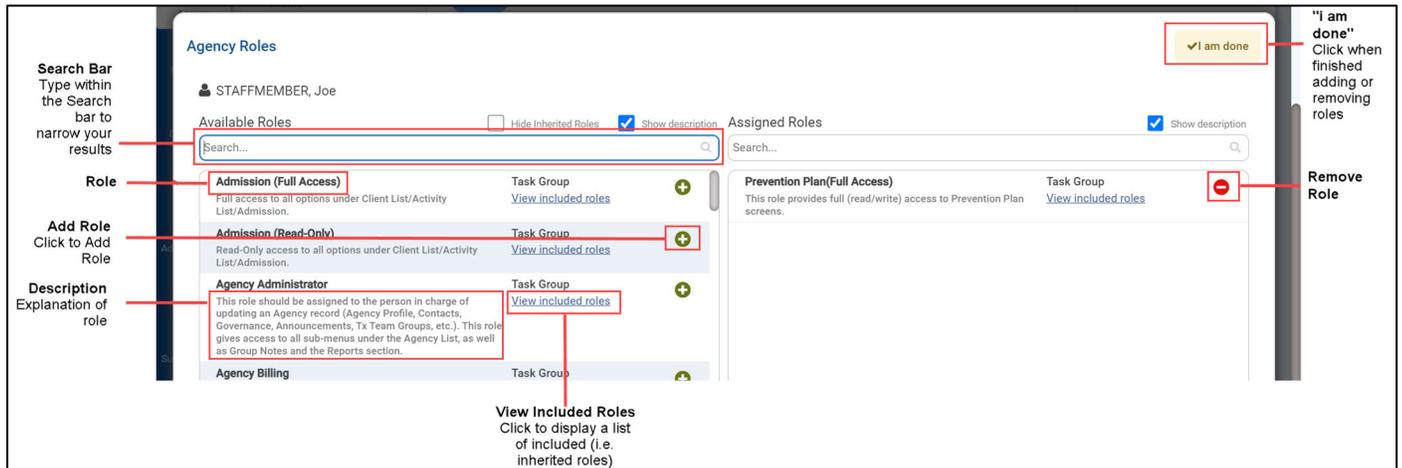
18. In the **User Account** panel, click **+Manage Roles**.

19. Use the **Search** bar to type the name of a role or scroll through the list.
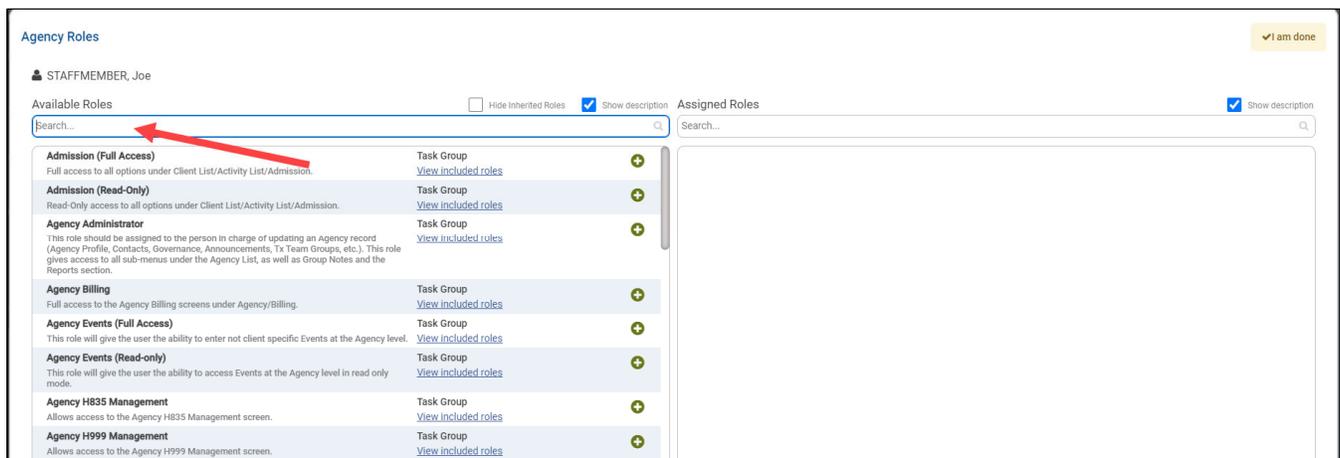
20. To add a role, click the green plus sign to the right of the role name. To remove an assigned role, click the red minus sign. If you are unsure what role you should assign to the staff member, please refer to the section in this guide titled "**Types of Prevention Users**".

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

22. Click **Done Editing**.

23. The staff member will receive an account activation email from noreply@witsweb.org. The user must click on the link in the account activation email to set their credentials **within 24 hours**. If a user's link has expired see the subsection titled "**Your Reset Credentials Link Has Expired**".

Locking Staff Member Access

When a user's access to the system needs to be revoked for any reason, the **Staff Administrator** should **"Lock"** the user's account. The **Lock Agency Access** action can be reached 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.
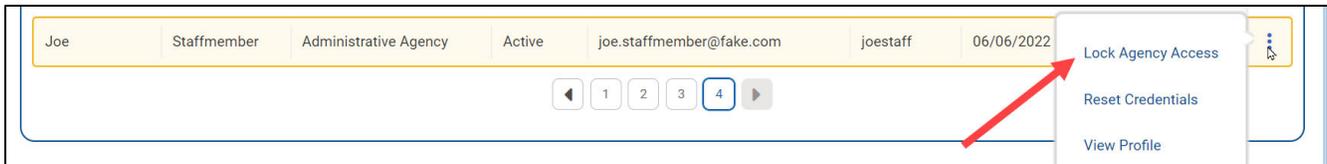
2. From within a **Staff Member Workspace**, the **Staff Administrator** can **Edit** the workspace and use the **User Account** panel to select the **Lock Agency Access** action.

3. When you select **Lock Agency Access** action you are required to enter a **Lock Reason**. Enter a reason and click **Lock**.
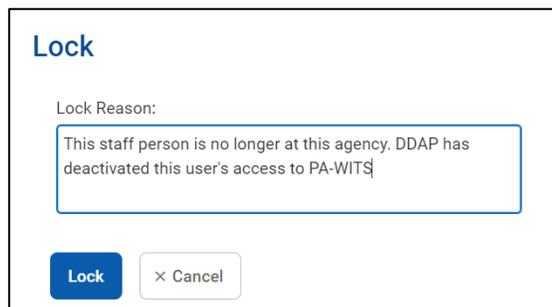
A "**Lock Agency Access** was successful" message will appear at the top of the workspace.
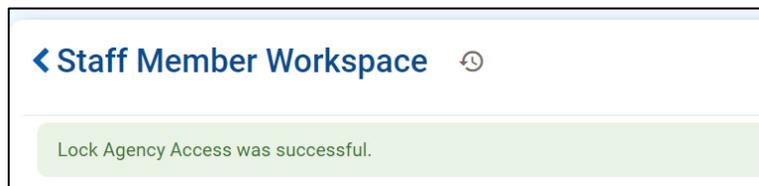
This staff member will no longer be able to gain access to PA WITS.

4. A user account may be reactivated by releasing the account lock. The **Staff Administrator** can establish the user's access using the "**Release Agency Lock**" option found on the **Staff Member Search** screen or on the **Staff Member Workspace User Account** panel.
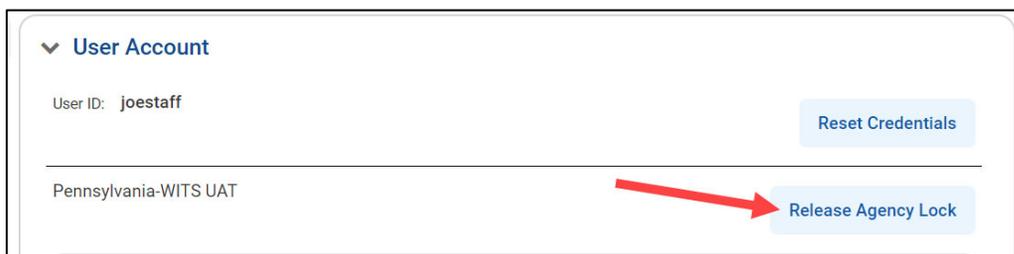
5. The **Release Lock** window displays the **Lock Reason** that was entered in red. **Staff Administrator** can then select the **Release Lock** action.
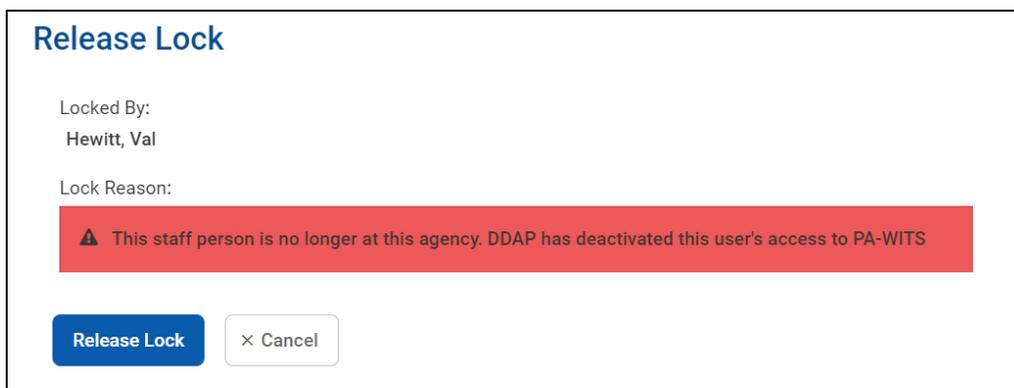
6. When you click **Release Lock,** a "**Release Agency Lock was successful.**" message will appear at the top of the workspace.
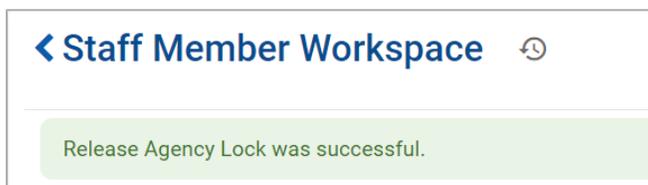
Part 3: Troubleshooting

Many common user error messages can be resolved through the **Staff Member's Account Profile** page.

Your Account is Already in Use

Solution: End IP System Session

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

Or (other option)

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

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

4. Click **Done Editing**.

You Have Exceeded the Maximum Number of Log-in Attempts

You have exceeded the maximum number of log-in attempts.

Your account has been disabled. Please contact your WITS administrator or supervisor.
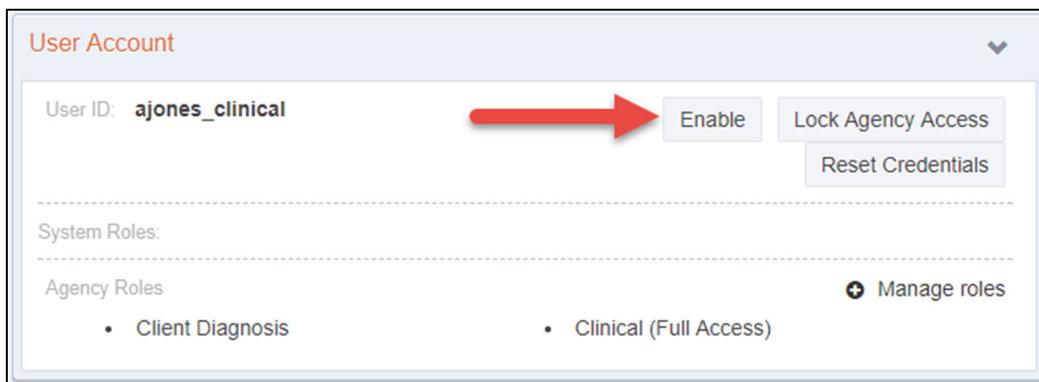
Powered by WITS
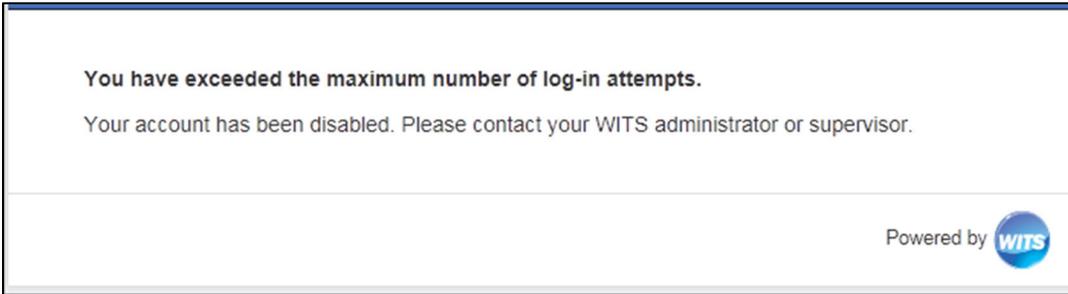
Solution: Enable account

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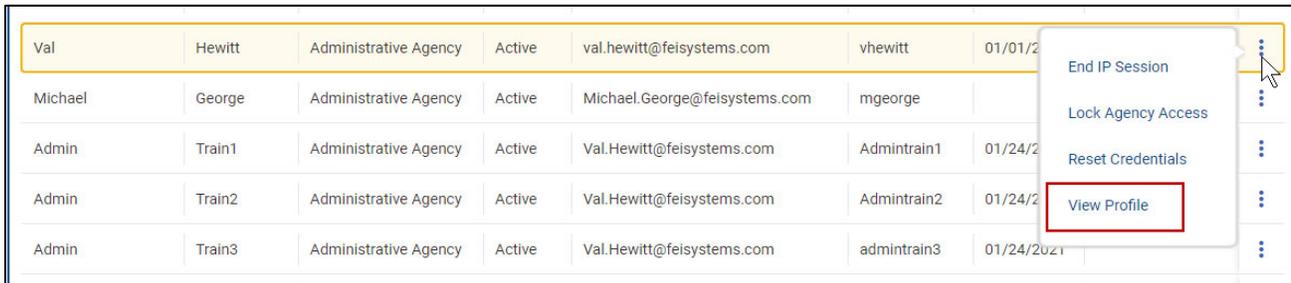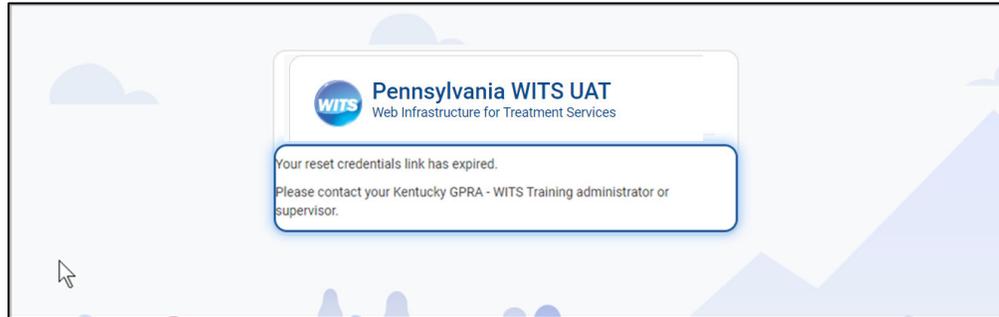

2. In the **User Account** panel, click **Enable**.

3. Click **Done Editing**.

Your Reset Credentials Link Has Expired

Solution: Reset Credentials

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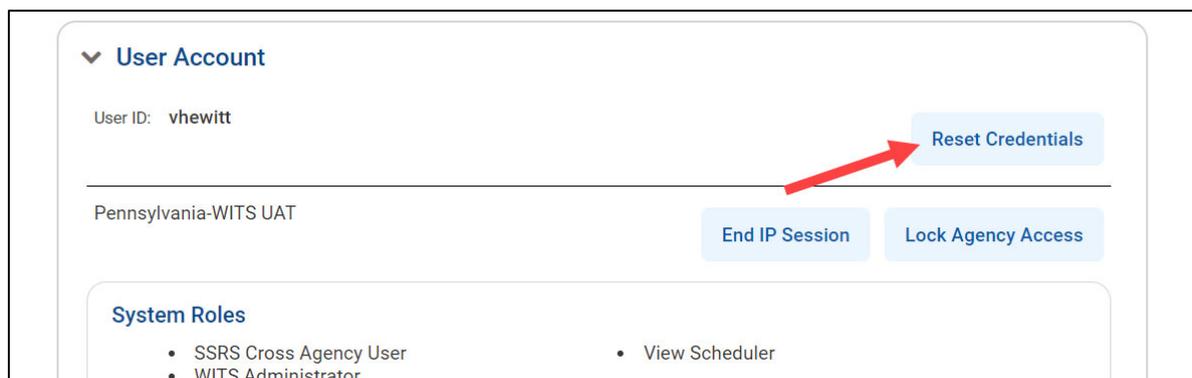

Or (other option)

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

3. In the **User Account** panel, click **Reset Credentials**. The staff member will receive an email containing a link to reset their credentials.

Note: When resetting credentials, the staff member will receive the below email containing a link to reset their credentials. 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.

Reset Credentials Email Example: Click the link at the bottom of the window to reset credentials.