



State Opioid Response (SOR) Grant

Standard SOR Administrator User Guide



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: <u>https://pa-training.witsweb.org</u>

Production Site: <u>https://pa.witsweb.org</u>

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: <u>https://www.samhsa.gov/grants/grant-announcements/ti-18-015</u>

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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



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.
	 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.

Home Page	Age	ncy Search			
▼ Agency	Domain				
✓ Agency List	Domain	· · · · · · · · · · · · · · · · · · ·			
Agency Profile				Clear Go	
Aliases	Age	ncv List		Add New Agency Record	
Contacts					
MILOuan	Actions	Name	Display Name	Description	
wo query		A Simpler Way Recovery Homes	ASWRH		
 Governance 					
Relationships	ø	Administrative Agency	DMHDDSAS	Domain: SBIRT Agency Type: Single State Agency (Contractor)	
Announcements		Alcohol / Drug Council of NC, inc	Alcohol / Drug	Domain(s): ATR Agency Type: RSS ATR Provider	

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.

Agency Name Administrative Agency Display Name Administrative Agency Display Name Administrative Agency Start Date Govt Organization Parent Agency Parent Agency Selected Agency Features Funding Contract Management Service Provider Contract Role Provider Contract Role Provider Contract Role Provider Contract Role Contract	Agency Profile			
Display Name Admin Agency Display Name Admin Agency Ba Start Date Gord Organization Parent Agency Parent Agency Selected Agency Features Funding Reporing Contract Role Provider State Date Contract Role Provider State Bainess ID Contract Role Provider Geo Code Senate Dist Commains Senate Dist Contract Role Provider Geo Code Senate Dist Commains Senate Dist Commains Senate Dist Contract Role Provider Senate Dist Geo Code Contract Role Provider Senate Dist Contract Role Provider Senate Dist Contract Role Provider Senate Dist Contract Role Provider Geo Code Domains Substance Abuse Substance Abuse Senate Dist Contract Role Provider Senate Dist<	Agency Name	Administrative Agency		
Agency Type Start Date Govt Organization Parent Agency Funding Reporting Contract Role National Provider ID Federal Tax ID Geo Code Contract Role Contract Role Provider Contract Role Contract Role Provider Contract Role Contract Role Provider Contract Role Contract Role Provider Contract Role Contract Role Contract Role Provider Contract Role Contract	Display Name	Admin Agency	DBA	
Start Date Govi Organization Parent Agenoy Agenoy Features Funding Reporting Contract Role Service Provider State Business ID ContractorLocator ContractorLocator ContractorLocator Geo Code Selected Domains Selected Domains Substance Abuse Cancel Save Finish Search			Agency Type	Single State Agency
Govt Organization Parent Agency Parent Agency Parent Agency Selected Agency Features Contract Management Service Provider Contract Role Provider ID State Business ID ContractorLocator Geo Code Selected Domains Selected Domains Selected Domains Selected Domains Selected Domains	Start Date	**	Inactive Date	
Consistent reprint Parent Agency Agency Features Perporting Contract Management Service Provider Service Provider Contract Role Provider State Business ID Contractor/Locator Geo Code Selected Domains	Govt Organization		Consumer Rep Met	
Agency Features Agency Features Comments Agency Features Comments	Parent Agency			System Testing Agency
Agency reatures Comments Selected Agency Features Comments Comments Comments Service Provider Contract Role Provider Contract Role Provider Contract Role Provider Federal Tax ID Federal Tax ID Geo Code County Bacon Geo Code County Bacon Geo Code County Count	Farent Agency		UNL	Criminal Justice
Reporting Contract Management Service Provider Contract Role Provider National Provider ID Federal Tax ID State Business ID Contractor/Locator County Bacon Geo Code Selected Domains Substance Abuse Comains Selected Domains Substance Abuse	Funding	Selected Agency Features	^ Comments	Mental Health Treatment
Service Provider Service Provider Contract Role Provider Substance Abuse Treatment Substance Abuse Treatment Substance Abuse Contractor/Locator County Bacon Geo Code County Bacon Selected Domains Selected Domains Substance Abuse County Coun	Reporting Contract Management	>		Recovery Support Service Agency
Contract Role National Provider Federal Tax ID Federal Tax ID State Business ID Contractor/Locator County Bacon Geo Code Selected Domains Substance Abuse Comains Selected Domains Substance Abuse Cancel Save Finish Search	Service Provider	×	~	Single State Agency
Contract Role Provider ID National Provider ID Federal Tax ID State Business ID Contractor/Locator County Bacon Geo Code Selected Domains Selected Domains Substance Abuse				Substance Abuse Treatment
National Provider ID Federal Tax ID State Business ID Contractor/Locator County Bacon Geo Code Domains Selected Domains Substance Abuse Substance Abuse	Contract Role	Provider		
Federal Tax ID Senate Dist State Business ID House Dist Contractor/Locator Cong Dist County Bacon Geo Code Selected Domains Substance Abuse Concel Save Finish Search	National Provider ID			
State Business ID Contractor/Locator County Bacon Geo Code Domains Selected Domains Substance Abuse Cancel Save Finish Search	Federal Tax ID		Senate Dist	¥
Contractor/Locator County Bacon Geo Code Domains Selected Domains Substance Abuse Cancel Save Finish Search	State Business ID		House Dist	w.
County Bacon Geo Code Domains Selected Domains Substance Abuse Cancel Save Finish Search	Contractor/Locator		Cong Dist	¥
Geo Code Domains Selected Domains Substance Abuse Cancel Save Finish Search	County	Bacon		
Domains Selected Domains Substance Abuse	Geo Code	v		
Domains Selected Domains Substance Abuse				
Cancel Save Finish Search	Domains	Sele	cted Domains	^
Cancel Save Finish Search		× ×		~
Cancel Save Finish Search				
		Cancel	Save Finish Search	

Figure 2-2: Agency Profile screen

- 4. When complete, click the **right-arrow button**.
- 5. Click the **Add Address** link.

Home Page	Addresses		Add Addre			
- Agency	Actions Address Type	Address	Phone	Updated		
→ Agency List → Agency Profile Addresses/Phone						
Aliases Contacts			Cancel Save	Finish Search		

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.

Home Page	Address Information				
← Agency	Address Type		*		Confidential No v
→ Agency List	Address Line 1				
✓ Agency Profile	Address Line 2				
Addresses/Phone	City			State 🔻	Zip
Aliases	Phone Numbers				Add Phone
	Actions Type	Number			
 Relationships 					
Announcements					
 Referrals 					
Removed Consents					Canaal
Deleted Clients					Cancel

Figure 2-4: Address Information screen

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

Address									
Address Type	Agency Admin. Office						Confidential	No	Ŧ
Address Line 1	123 Main Street								
Address Line 2									
City	Baltimore		State Maryland		Zip	21234			
Phone									
Туре	Y	Ext:	Cancel Finish						



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

Home Page	Addre	Addresses						
✓ Agency	Actions	Address Type	Address	Phone	Updated			
→ Agency List	Ø	Agency Admin. Office	490-B Post Road	work (123) 123-1234	1/13/2011			
 Agency Profile 			Sudbury, MA 01770					
Addresses/Phone								
Contacts								
Relationships				Cancel Save Finish S	earch			
Announcements								

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.

Home Page	Agency Disclosure Domain List	Add Agency Disclosure Domain Record
✓ Agency		
- Agency List	Actions Connects Connected Bit	Concerns Constant To
Agency Profile	Actions Consents Granted By	Consents Granted To
Aliases		
Contacts		
 Governance 		
 Relationships 		
Collaborative		
Disclosure		

Figure 2-7: Agency Disclosure Domain List screen

Agency Disclosure Domain				
Disclosing Agency	v			
Receiving Agency	Global Policy or Non Syst 🔻			
Receiving Entity(Non System Agency)				
Global Policy? (Available To All Agencies)	Yes 🔻			
Always Verify Consent?	Ŧ			

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 r			
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.

Agency Disclosure Domain					
Disclosing Agency	Administrative Agency				
Receiving Agency	Global Policy or Non Syst				
Receiving Entity(Non System Agency)					
Global Policy? (Available To All Agencies)	Yes				
Always Verify Consent?	Yes				
Disclosure Domain Selection					
Olivert Information To Do Com					
Client information To Be Con	sented				
Expiration Type Discharge(UD)	+ Days				
*Expiration type is required for d	lisclosure activities.				
Consent Options	Selected Options				
Behavioral Health Assessment	Admission (UD, +30)				
CONTINUUM Triage™ Assessment	Client Information (Profile) (UD, +30)				
CONTINUUM™ DENS ASI Assessment	Client Screening (UD, +30)				
DENS ASI Lite	▼ Intake Transaction (UD, +30)				
Comments					
	//				
	Cancel Save Finish				

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.

		🖻 SSRS R	eports	· @ S	napshot
Home Page	0	There is currently 1 person that has been referred in.			×
 State Waitlist 					
Agency	Home				
Group List	Anno	Announcements			
Clinical Dashboard	Actions	Summary	Posted Date	Start Date	Priority
Client List	ø	Welcome to PA WITS! This version of the PA WITS system is dedicated to the collection of TEDS data since September 2015. Policy bulletin, QSOA, and training resources can be found by clicking the PA WITS tab at www.ddap.pa.gov	5/12/2017 4:09 PM	5/12/2017	н
 System Administration 					
Reports					

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.

STANDARD WIT	'S Us	er Documentation Agency	, User Documentation Facility 🖋	Jones, Ashley ▼ Logout
				SSRS Reports Snapshot
Home Page	Anno	uncement List		Add New Announcement
▼ Agency	Actions	Summary	Sort Order	Priority
✓ Agency List				
 Agency Profile 	-			
Aliases				
Contacts				
▶ Governance				
Relationships				
Announcements				

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. Announcements Actions Summary Welcome to PA WITS! This version of t Review Urces can be found by	
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.	

Announcement	s				
Summary					li.
Details					
Agency Type				v	//
	Domains		Selected Domains		
	Substance Abuse	÷ > <		*	
Agency	Administrative Agency	v	Priority	v	
Start Date	**		End Date	#	
Sort Order					
Created By			Created Date		
			C	ancel Finish	



- 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.

STANDARD WIT	S User Documentation Agency 🖍	Jones, Ashley - E Logout
		🖹 SSRS Reports 📔 🔹 👁 Snapshot
Home Page	Facility List	Add New Facility Record
- Agency	Actions Facility Name	
 Agency List Health Information Mgmt Facility List Facility Profile 		

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					

Facility Profile					
Facility Name		Di	splay Name		
I-BHS State ID		Ag	ency Name Administrat	ive Agency	
Service Location					
Operations Start/End Date	7/5/2017	Reports Sta	rt/End Date	**	
Contact	v	Alterr	ate Contact	v	
			Senate Dist		
National Provider ID					
Federal Tax ID			House Dist 🔍 👻		
State Business ID			Cong Dist 🔍 👻		
Contractor/Locator			URL		
County	v	Facility	Description		
Geo Code	v				
Approaches		Selected	Approaches		
12-step Cognitive/Behavioral		^			*
Family Humanistic/Existential					_
					Ť
Languages		Selected	Languages		
English Amharic		^ >			^
Arabic					
American Sign Language		· ·			*
		Can	cel Save F	inish 🕟	

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.

Home Page	Addr	esses	_	Add Address		
✓ Agency	Actions	Address Type	Address	Phone	Updated	
Agency List						
 Facility Profile 						
Addresses				0		
Contacts				Cancel	Save Finish	

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.

	S User Documentation Agency,	User Documentation Facility 🖋		Jones, Ashley → Logout
				🖹 SSRS Reports 📔 🕔 👁 Snapshot
Home Page	Address Information			
▼ Agency	Address Type		Ŧ	Confidential No v
Agency List	Address Line 1			
Health Information Mgmt	Address Line 2			
	City			State Zip
 Facility Profile Addresses 	Phone Numbers			Add Phone
Contacts	Actions Type	Number		
Special Services				
Programs				
Addiction Services				
Operating Hours				
Primary Staff Set Up				-Cancel Finish



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

STANDARD WITS	S User Documentation Agency, User Documentation Facility & Jones, Ashley - Logout				
					SSRS Reports
Home Page	Address Information				
✓ Agency	Address Type	Unit administration		v	Confidential No v
 Agency List 	Address Line 1	525 Cedar Run Road			
Health Information Mgmt	Address Line 2				
	City	Columbia			State MD V Zip 21046
 Facility Profile Addresses 	Phone Numbers				Add Phone
Contacts	Actions Type	<u>Nt</u>	umber		
Special Services					
Programs					
Addiction Services					
Operating Hours					Cancol
Primary Staff Set Up					Calicel

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

Home Page	Address				
✓ Agency	Address Type	Unit administration			Confidential No v
 Agency List 	Address Line 1	525 Cedar Run Road			
Health Information Mgmt	Address Line 2				
	City	Columbia		State Maryland	Zip 21046
	Phone				
Addresses	Thomas				
Contacts	Type office v (410) 53	5-1234 Ext: Cancel Finis	sh		
Special Services					

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.

	S Us	er Documentation Agend	y, User Documentation Facility 🖋		Jones, Ashley + Logout
				SSR	S Reports
Home Page	Addr	resses			Add Address
✓ Agency	Actions	Address Type	Address	Phone	Updated
 Agency List Health Information Mgmt Facility List Eacility Profile 	ø	Unit administration	525 Cedar Run Road Columbia, MD 21046	office (410) 535-1234	5/22/2017
Addresses Contacts				Can	el Save 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.

Home Page	Contacts for Administrative Unit						
✓ Agency	Actions	Contact Type		Name	Status	Created	Effective
Agency List							
Facility Profile							
Contacts							Add Contact
Special Services							Aud Contact
Programs		Staff					
Addiction Services		Contact Type					
Operating Hours		Effective Date					
Primary Staff Set Up		Status					
Inpatient Unit	M	anager Name					
Staff Members						Finis	•b
Tx Team Groups						Fillis	511

Figure 3-8: Facility Contacts screen

3. Complete the fields.

Home Page	Contac	ts for Admir	nistrative Unit							
✓ Agency	Actions	Contact Type			<u>Name</u>	Status		Created	<u>I</u>	Effective
Agency List										
Facility Profile										
Contacts										Add Contact
Special Services										Add Contact
Programs		Staff	Garg, Deeksha		Ŧ					
Addiction Services		Contact Type	Referral		v					
Operating Hours		Effective Date	7/1/2017	#						
Primary Staff Set Up		Status	Active	v						
Inpatient Unit	N	anager Name								
Staff Members							Cancel	Save	Finish	
 Tx Team Groups 							Cancer	Save	THIISH	

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.

Home Page	Special Services	
Agency Agency List Facility List Facility Profile Contacts Special Services Programs	Agency Name Administrative Agency Facility Name Administrative Unit Special Population Services Assistance for Illiterate Clients Food Services - Kosher, Vegetarian, Special Diets Interpreter Services Manage Actively Psychotic Clients	Special Populations Served Family Services Mental Illness Treatment Services Services for the Hearing-Impaired Wheelchair Accessibility
Addiction Services	General Information	Add New Information Item
Operating Hours Primary Staff Set Up Inpatient Unit Staff Members • Tx Team Groups Alerts Configuration	Actions Service Information Cancel Save Finish	Details

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

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

Home Page	Facility Service
✓ Agency	Facility Sunnorted Services In Therapy Available On site?
 Agency List 	
 Facility List 	
Facility Profile	Provide Detail
Contacts	
Special Services	Consol Course Finish
Programs	Calicer Save Filiisi

Figure 3-11: Add New Information Item screen

4. Click Save then click Finish.

Home Page	Special Services	
✓ Agency	Agency Name Administrative Agency	
Agency List	Facility Name Administrative Unit	
 Facility List 		
Facility Profile	Assistance for Illiterate Clients	A
Contacts	Food Services - Kosher, Vegetarian, Special Diets Mental Illness Treatment Services	rvices
Special Services	Manage Actively Psychotic Clients	-
Programs		
Addiction Services	General Information	Add New Information Item
Operating Hours	Actions Service Information	Details
Primary Staff Set Up	Is Therapy Available On-site?	Yes
Inpatient Unit	Does the Facility Have Staff Credentials Available On-site?	Yes
Staff Members	9	
Tx Team Groups		
Alerts Configuration	Canada Cinich	
System Administration	Cancer Save Filish	

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.

Pennsylvania-W	ITS U	AT Admin	istrative Agency, Test facility 🖋				Nailc	or, Kayla ▼ Logout
& Rader, Tim 05001101709991	0 🛛							Snapshot
Home Page	Prog	yram List					Add New F	Program Record
 State Waitlist 	Actions	Program Name	Modality	# Slots	Current Enrolled	Residence	Gender Specific	Term
✓ Agency	ø	Prevention	Prevention	0	0			3/13/2018 -
Agency List	A	SOR SCA	9100-Case/Care Management	20	0			7/1/2019 -
Overdose Reversal Kits	A	Test Program	810-Intake, Evaluation, and Referral	100	0			1/1/2015 -
 Facility Profile 								
Contacts								
Special Services								
Programs								
Addiction Services								

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".

Program Set	up	
Agency Name	Administrative Agency	
Facility Name	Test facility	
Program Name		
Display Name		
Domain	×	
Modality		Ψ.
Modality Specifier		w.
Current Enrolled		
Program Type		
ASAM Level of Care		PCPC Level of care
Residence	¥	
Report to State	Yes *	Grant
Report to TEDS	¥.	
	Available Reporting Guidelines	Selected Reporting Guidelines
	>	^
	× <	✓
Age Group	w.	Gender Specific
Waitlist Availability Type	v.	
	Available Evidence-Based Practices	Selected Evidence-Based Practices
	Motivational Interviewing	^
	Other Content	~
Program Start		Fad Data 60
Date		
		Cancel Save Finish

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 Fields²

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 COR DECE (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.			
	Modality Specifier Medication-Assisted Treatment			
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.			
Report to State				
Report to TEDS*	Report to TEDS No V			
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.			

Ŧ
Finish

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.

Сара	acity List		Add New Capac			
Actions	Capacity Type	Capacity	Start Date	End Date		
-						

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)

Program Capacity	Details					
Capacity Type	Slots 💌					
Daily Capacity	20					
Start Date	5/31/2017	m				
End Date		m				
Note			*			
				Cancel	Save	Finish

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**.

Home Page	Prog	ram List				A	dd New Program	<u>n Record</u>
✓ Agency	Actions	Program Name	Modality	# Slots	Current Enrolled	Residence	Gender Specific	<u>Term</u>
 Agency List 	A	MAT	Detoxification, 24 Hour Service, Free-Standing Residential	100	1			1/1/2019 -
GPRA Discharge Due Overdose Reversal Kits		Non-MAT	Detoxification, 24 Hour Service, Free-Standing Residential	100	0			1/1/2019 -
	Ŭ	Review						
 Facility Profile 								
Contacts								
Special Services								
Programs								

Ô

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**.

Home Page	Addiction Services
 State Waitlist 	Agency Name DEPARTMENT OF CORRE
✓ Agency	Facility Name Main Facility
Agency List	Addiction Service Selected Addiction Service
Overdose Reversal Kits	Alcohol
	Cocaine/Crack Marijuana/Hashish
Facility Profile	Heroin
Contacts	Methadone Cherrory Contract of
Special Services	
Programs	Methamphetamine/Speed
Addiction Services	Other Amphetamines Other Stimulants
Operating Hours	
Primary Staff Set Up	Cancel Save Finish
Inpatient Unit	
Staff Members	

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.

Home Page	Facility Operating Hours						
State Waitlist	* Please enter times below	in hh:mm format followed by "am" or "pm"(ex:	08:30 AM)				
✓ Agency	* You can create multiple n	* You can create multiple ranges within one day, like 9:00 am - 11:00 am, then 1:00 pm - 3:00 pm.					
▶ Agency List	Set Tuesday to Friday sam	e as Monday					
Overdose Reversal Kits	Day	Range 1	Range 2	Range 3			
	Monday	-	-				
Facility Profile	Tuesday						
Contacts	Tuesday	-	-	-			
Special Services	Wednesday						
Programs							
Operating Hours	Thursday	-	-	-			
Primary Staff Set Up	Friday						
Inpatient Unit			-				
Staff Members	Saturday	-	-	-			
► Billing	Sunday						
 Contract Management 	Sunday	-	-	·			
Alerts Configuration							
 Group List 	Months of Operation		Months of Operation (selected)				
Clinical Dashboard	January February	>		A			
Client List	March April	- <		-			
System Administration							
Reports							
Support Ticket			Cancel Save Fi	nish			

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



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

Field	Description		
A	Pencil Icon : Pointing to the icon will display available options to click.	E	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.	Select View	Hover Text: When you point to an item or symbol, text describing the item may appear.
Search	Search	Search : Type within the se click the Search button.	arch field and then
Previous 1 2 3	4 5 Next	Pages : Allows the user to p search results.	bage through all

Table 4-2: Workspace Screen Icons/Buttons

Field	Description			
🖋 EDIT	Edit: Click to enable editing for the screen. Of	herwise, the p	panels on screen will be read-only.	
Add	Add : Allows the user to add data to the panel or section.	0	Remove : Allows the user to delete information in the panel or section.	
A	Edit : Allows the user to edit information on a panel or section.	Э	History : Allows the user to view the changes made on the current page.	
Save	Save button : All required fields have been completed.	<u>Cancel</u>	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.	
V DONE E	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.
Sele	ect						Ŧ	Drop-down field : Select one option from the list.
A Yo	u cannot	add mo	re than	one Soc	ial Secu	irity Numl	ber.	Error Message : The error message is localized and is generated where the error occurred.
			Ê	-			Ê	Date-range fields/Calendar picker : Enter a date or click the calendar icon to select a date.
	Ê							Date Picker : Allows the user to pick a date from a calendar.
<		Feb	ruary 2	2018		>		
t Sun	Mon	Tue	Wed	Thu	Fri	Sat		
20	29	06	07	01	02	10		
11	12	13	14	15	16	17		
18	19	20	21	22	23	24		
25	26	27	28	01	02	03		
04	05	06	07	08	09	10		
Too	lay (Clear			Do	one	1	
Readir Slightly	Reading: Speaking: Writing: Slightly Proficient Moderately Proficient Extremely Proficient				۱ ent E	Writing: Extremely	Proficient	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	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").

wits	STANDARD	WITS	Administrative Agency, Adm	inistrative	e Unit 🎤			Jones, Ashley ▼ = Logout
							🖹 SSRS Rep	oorts 👁 Snapshot
	ENU Q Staff Member Search							
Search	Advanced Search						O Crea	ate New Staff Member
Searc	h						Searc	h
Showin	g 1-50 of 241		Previous 1 2 3	4 5	Next Select Colur	nns III - Se	elect View	
	First Name	Last Name	Agency	<u>Status</u>	Email	<u>Identifier</u>	Start Date	Termination Date
ø	Ron	Swanson	Administrative Agency	Active	ron.swanson@pawnee.in.gov	RSwanson177	10/01/2013	09/25/2018
ø	Admin	User	Administrative Agency	Active	noreply@feisystems.com	admin	01/01/2009	
ø	Bobby	Mantoni	Administrative Agency	Locked	bmantoni@feinfo.com	bmantoni	04/16/1987	01/08/2010
A	Chris	White	Administrative Agency	Active	cwhite@feinfo.com	cwhite	04/16/2009	
A	Gagan	Singh	Administrative Agency	Active	gsingh@feinfo.com	gsingh	10/02/2075	04/09/2085

Figure 4-1: Staff Member Search/List screen

Table View

Showin	g 1-1 of 1			evious 1 Next	Select Columns	 Select Vie 	w 🎟 🎫 🖾
	First Name	Last Name	<u>Status</u>	Email	Identifier	Start Date	Termination Date
ر ساچ	Ash	Jones	Active	ashley.jones@feisystems.com	standard.admin	01/01/2017	
	Lock Agency	<u>Access Res</u>	et Credent	ials <u>View Profile</u> us 1 Next			

Panel View

Showing 1-1 of 1	Previous 1 Next	Select Columns III - Select View III -
Ash Jones		Lock Agency Access Reset Credentials View Profile
ashley.jones@feisystems.com standard.admin Sun Jan 01 2017 00:00:00 GMT-0500	(Eastern Standard Time)	
	Previous 1 Nex	a

Advanced Search

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

	STANDARD		Administrativ	ve Ageno	:y, Adı	ninistra	tive Unit 🖋		
	Q Staff M	lember Searc	h						
Search	Advanced Sear	ch (h)	_						
Searc	h								
Showin	g 1-50 of 241		Previous	1 2	3	4 5	5 Next		Select
(e)	First Name	Last Name	Agency			Stat	us <u>Email</u>		
ø	Ron	Swanson	Administra	itive Age	ency	Activ	ron.swar	nson@pawnee.ir	n.gov

Figure 4-2: Advanced Search tab

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

WITS	STANDARD WITS	Administrative Agency, Administrative Unit 🖍
MENU	Q Staff Member Sea	ch
Search	Advanced Search	
My Sa	aved Searches	Manage Saved Searches
O Ad	d Search Criteria	
Sea	Ch Save Search	

Figure 4-3: Add Search Criteria

Search Advanced Search	
My Saved Searches	Manage Saved Searches
Select 💌	×
Add Search Criteria	
Search Save Search	٦

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

Search Advanced Search	
My Saved Searches	 Manage Saved Searches
Select	
First Name	
Agency Status	rch
Email	
Start Date	
Is Locked 🛛 👆	
Termination Date	Previous 1 2 3 4 5 Next

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**.

STANDAR 18.39.0		Administrative Agency, Administrative Unit 🖋
MENU Q Sta	ff Member Sea	rch
Search Advanced S	earch	
My Saved Searches	•	Manage Saved Searches
Is Locked	▼ True	* ×
Add Search Criteria Search Search	ave Search	

Figure 4-6: Advanced Search; Click Search

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

wits	STANDA 18.39.0	RD WITS	Administrative Agency, Admin	nistrative Unit 🌶	,			Jones, Ashley Logo	, ≡ ,t
							🖹 SSF	RS Reports 👁 S	Snapshot
MENU	Q Sta	aff Member Sea	rch						
Search	Advanced S	Search					0	Create New Staff	Vember
My S	aved Searches	· /	Manage Saved Searches						
Is Loc	ked	▼ True	* ×						
O Ad	d Search Criteria								
Sea	rch 🖺 S	ave Search							
					•				
Searc	h results for " tr	ue, "							
Showir	ng 1-1 of 1		Previous 1	Next	Sel	lect Columns	Select Vie	w 🔳 🎫	×.
	First Name	Last Name	<u>Agency</u>	<u>Status</u>	<u>Email</u>	<u>Identifier</u>	Start Date	Termination Dat	<u>e</u>
ø	Bobby	Mantoni	Administrative Agency	Locked	bmantoni@feinfo.com	bmantoni	04/16/1987	01/08/2010	
				Previous	1 Next				

Save Advanced Searches

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

Search	Advanced Search	
My Saved S	Searches 🔻	Manage Saved Searches
Is Locked	¥	True 🔻 🔀
Add Sea	arch Criteria	
Search	🖺 Save Searc	:h

Figure 4-7: Advanced Search, Save Search

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

Save Your S	Search	×
Name		
Locked Account	s	
Save Can	cel	

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.

Search Advanced Search	
My Saved Searches	Manage Saved Searches
Locked Accounts	
 Add Search Criteria 	
Search 🖺 Save Search	ch

How to Set Up a New Staff Member Account



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.

M	INU	Q Staff Me	mber Search						
	Search	Advanced Searc	h					O Create	New Staff Member
	Search							Search	
:	Showing	g 1-23 of 23		Previous 1	Next	Select Columns	III - Sel	lect View	≅ ±
		First Name	Last Name	Agency	<u>Status</u>	Email	<u>Identifier</u>	Start Date	Termination Date
	A	Admin	User	Administrative Agency	Active	noreply@feisystems.com	admin		
		System	User	Administrative Agency	Active	noreply@feisystems.com	system		

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.

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.

Table 4-5: Create New Staff Member fields

Figure 4-8: Staff Member screen

WITS PA-W		_
18.25.4	Create New Staff Member	SSR:
	Prefix:	
Search Ad	First:	O C
Search	Clinical	11
	Preferred:	
Showing 1-41 of	Middle:	II - Select View
First N	Last:	dentifier
Admin	Staff	ıdmîn
Systen	Suffix:	ystem
Pre-Wi Migrati	Gender:	Process-105
SSRS	Not Collected * 👻	srsadm
Manan		nkatohora
J Kristyn	Create <u>Cancel</u>	OReilly
Michele	Saul Adency Active misaul@pa.gov	msaul

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.

Search	Staff Member Workspace 🦻		
Profile	Jones, Ashley A. Female Date of Birth:	Completion Requirements Add Email Address Add Employment Start Date Add Staff Member Type	
Employme	ent Profile	Additional items	

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.

Back to	Search 🔒 Staff Member Workspace 🤊	
Profile	Contact Information Preferred Method Of Contact:	Completion Requirements
Employment Profile User Account Contact Information »	 ashley.jones@feisystems.com Primary Add Email Addresses 	+ Add Employment Start Date ?
Domains	 No Items Add Phone Numbers 	Additional items Add Identifier Define Employment Profile
	No Items Add Physical Addresses	Add Facility Assignment Add Professional Qualification Add Email Add Phone Number

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.

Back	to Search	🌢 Staf	f Memb	er Worl	cspace	୭			
<		nt Profile						× >	
Profile Employment Profile User Account [≫]	Job Title Select	:					¥	Comp + Ac Da	d Employment Start 3
Contact Information Identifiers Domains	Staff Me	ude Job T mber Type	itle in Di e:	splay Na	ime		×	+ Ac	d Staff Member Type
	Employn Select	nent Type	£				¥	> Add > Defin	Identifier 1e Employment Profile
	Employn 01/17/20	nent Date	Range:		*	Has en	d date	bbA < bbA < bbA <	Facility Assignment Professional Qualification Email
	< Sun	Mon	Jan ^{Tue}	Wed	2017 Thu	Fri	> Sat	⇒ Add ⇒ Add	Phone Number Address are Accounts and Poles
	01 08	02 09	03 10	04 11	05 12	06 13	07 14	Add	Language Checklist Item
	15	16 23	17 24	18 25	19 26	20 27	21 28	bbA ≪ bbA ≪ bbA ≪	
	29	30	31	01	02	03	04	bhA io	
	U5	U6 ay C	U7	08	09	10 De	11 one		
	User Accou	int						× .	

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.

Identifiers	~
Туре:	
Social Security Number	
Effective:	
Note:	
	<u>//</u>
Save <u>Cancel</u>	

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**.

Facility Assignments		~
Facilities:		
sktest1	Administrative Unit	
test1		
test4		
test5		
testf1		
testf2		
C testf3	-	
Effective:		
F 1/17/2017 🛗 –	Has end date	
Save <u>Cancel</u>		

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.

 Profile » Employment Profile User Account Contact Information Identifiers Domains 	Profile Staff, Agency Not Collected Date of Birth: Employment Profile	Additional items Define Employment Profile Manage Accounts and Roles Add Facility Assignment Add Professional Qualification Add Phone Number
	Job Title: Staff Mamber Type: Agency Administrative Staff Employment Type: Employment Type: 01/17/2017 - Employment Date Range: 01/17/2017 - Full Time Equivalent: Taxonomy Classification: Taxonomy Specialization: Relationships: Employment Type: Relationships: Image: Classification Staff Image: Classification Staff	 > Add Address > Add Identifier > Add Lenguage > Add Checklist Item > Add Relationship > Add Relationship > Add Training > Add Note > Add Domain
	User Account Contact Information	* *

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.

<	User Account	~
Profile Employment Profile	User ID:	
Contact Information	Email Address:	
Domains	Create Account Cancel	

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.

Program:	
Select	*
Effective:	✓ Has end date
Hours/Week:	
Contract (

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.

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.

Table 4-6: SOR Related Roles

Assign User Roles

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

User ID: staffadmin	Enable	End IP Session	Lock Agency Access
		Reset Credentials	Release Agency Lock
System Roles:			
Agency Roles		-	o Manage roles 🔶
			0
Contact Information			
Contact Information Preferred Method Of Contact:			

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).

					SSRS Reports
G Back to Search 🔒 Staff Me	ember Workspace	9		✓ DONE EDITING	
ency Roles					✓ I a
Jones, Ashley					
Available Roles	Hide Inherited Roles	Show descript	ion Assigned Role	S	Show des
Search		C	Search		
Activate/Deactivate System Accounts	Task	0	*		
Can activate/deactivate System Accounts.	View included roles				
Admission (Full Access) Full access to all options under Client List/Activity List/Admission.	Task Group View included roles	0			
Admission (Read-Only) Read-Only access to all options under Client List/Activity List/Admission.	Task Group View included roles	0			
Agency Administrator This role should be assigned to the person in charge of updating an Agency record (Agency Profile, Contacts, Governance, Announcements, Tx Team Groups, etc.). This role gives access to all sub-menus under the Agency List, as well as Group Notes and the Reports section.	Task Group <u>View included roles</u>	0			
Agency Billing	Task Group	0	-		

- 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.

Professional Qualifications	~
Category:	
License × v	
Туре:	
Substance Use Disorder Counselor (SUDC) * *	
Issuer Name:	
Include in Display Name	
Effective:	
5/1/2015 🛗 🗕 🛗	
✓ Has end date	
Save <u>Cancel</u>	
Profile	~
Jones, Ashley, SUDC	Cart .
Female Date of Birth:	Cart .
Ø	

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.

	Q Staff Me	ember Search
Showir	ng 1-46 of 46	
	First Name	Last Name
ø	Admin	User
ø	System	User
ø	Pre-WITS ligration	Process
<i>i</i>	SSRS	Adm
Lock	Agency Access	Reset Credentials View Profile

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.

	Staff Member Workspace 🦻	
[
Profile		×
0	Provider01, Training Unknown Date of Birth:	

User Account		~
User ID: tprovider01	Lock Agend	cy Access Reset Credentials
System Roles: • Cross-Agency Waitlist Management (Full Access)		
Agency Roles Agency Billing Client Diagnosis (Full Access) Release To Billing 	Billing Encounter ListClinical (Full Access)	Manage roles

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

Lock
Lock Reason:
This staff member is no longer employed at this agency. Access has been deactivated from MS-WITS.]
Lock <u>Cancel</u>

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.

	Back to Search	🛔 Staff Member Workspace 🤊				
Lo	Lock Agency Access was successful.					

- 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**.

User Account			~
UserID: tprovider01		Reset Credentials	Release Agency Lock
System Roles:			
Agency Roles Agency Billing Client Diagnosis (Full Access) Release To Billing 	 Billing Encounter List Clinical (Full Access) 		Manage roles

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

Release Lock
Locked By: Leffler, Madeline Lock Reason:
A This staff member is no longer employed at this agency. Access has been deactivated from MS-WITS.
Release Lock Cancel

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

	Back to Search	🛔 Staff Member Workspace 🤊
Re	elease Agency Lock was successful.	

 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.

Employment Profile				*
Job Title: Administrator	Staff Member Type: Administrator Full Time Equivalent: Taxonomy Type:	Employment Type: Permanent	Employment Date Range: 10/01/2016 - 10/19/2017	1
Taxonomy Classification: Taxonomy Specialization:	i addioing Type.			

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.

Ø	Ashley	Jones	Administrative Agency	Active	ashley.jones@feisystems.com	ajones	
End	IP Session		ess Reset Credentials	View Profile	olby.kinsey@feisystems.com	kolby.kinsey	
A	Madhuri	Peyyavula	Administrative Agency	Active	Madhuri.Peyyavula@feisystems.com	mpeyyavula	04/01/2015

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.

ø	Ashley	Jones	Administrative Agency	Active	ashley.jones@feisystems.com	ajones	
Enc	I IP Session	Lock Agency Acces	ss <u>Re</u>	View Profile	olby.kinsey@feisystems.com	kolby.kinsey	
ø	Madhuri	Peyyavula	Administrative Agency	Active	Madhuri.Peyyavula@feisystems.com	mpeyyavula 04	4/01/2015

2. Click Edit.

		SSRS Reports
O Back to Search	🖀 Staff Member Workspace 🤊	

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

lser Account	~
User ID: ajones	End IP Session Lock Agency Access Reset Credentials
System Roles: • Clinical (Full Access) • WITS Administrator	SSRS Administrator
Agency Roles	 Manage roles

4. Click Done Editing.

		SSRS Reports
Back to Search	🛔 Staff Member Workspace ව	

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

2.



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.

Ageno	cy Staff	Administrative Agency	Active ashley.jo	ones@feisystems.com	staffadmin	01/17/2017
Lock Agency	Access Remine	View Profile	Previous	1 2 3 4 Next		
Click Edit .						
					SSRS Reports	Snapshot
	Back to Searce	ch 🔒 Staff Member Works	space 🤊 🛑		Ð	

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

User Account	~	
User ID: ajones_clinical	Enable Lock Agency Access Reset Credentials	
System Roles:		-
Agency Roles Client Diagnosis 	 Manage roles 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.

Ì	Agency	Staff	Administrative Agency	Active ashley.jones@feisystems.com staffac	imin 01/17/2017
Loci		Reset Cr	redentials View Profile	Previous 1 2 3 4 Next	

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.

🖍 Ag	gency St	aff	Administrative Agency Act	ive	ashley.jones@feisysten	ns.com	staffadmin	01/17/2017
Lock Age	ency Access	Re	View Profile	Pre	vious 1 2 3 4	Next		
Click Edit								
							D CODC Denote	e Orandat
							SSR5 Reports	 Snapsnot

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

Jser ID: staffadmin	Lock Credentials
ystem Roles:	
Agency Roles	Manage role

4. Click Done Editing.

		SSRS Reports
Back to Search	🛔 Staff Member Workspace ව	

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.