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Introduction

Every UWITS user has both a System Account and an Agency Account. These are joined together and work as one.

The System Account includes the Staff Member's User ID and other login information as well as their System Roles. System Roles allow users the same permissions in all agencies. System Accounts are managed by the WITS Administrators.

The Agency Account includes the Staff Member Profile, connects the user to their Agency and includes their Agency Roles. Agency Roles allow users permissions in their assigned agency. Agency Accounts are managed by the Agency Navigators.

UWITS Roles are also sometimes referred to as rights or permissions. The UWITS Roles assigned to a user will determine which screens and reports they are able to see and use.

Staff Member Search Screen



Staff Members

To navigate to the **Staff Members** module, click on the **Agency** button in the to the left then click on **Staff Members**.

Use the Advanced Search to select search criteria and save to your computer via a cookie.

Typing search terms into the default Search bar searches through the columns currently displayed on the screen to find rows that contain the search terms.

The **Staff Member Search** screen lists all UWITS users for the current **Agency**.

Staff Member Search

Search: **Advanced Search**

Search...

Showing 1-4 of 4

First Name	Last Name	Agency	Status	Email	Identifier	Start Date	Termination Date
Miranda	Priestly	Patty's PBA Test Agency	Active	rmasters@slco.org	mpriestly	07/01/2021	
Andy	Sachs	Patty's PBA Test Agency	Active	rmasters@slco.org	asachs	07/01/2021	
Emily	Charlton	Patty's PBA Test Agency	Active	rmasters@slco.org	echarlton	07/01/2021	

Select Columns: [Dropdown]

Select View: [Table View] [Panel View]

Export

Lock Agency Access

Reset Credentials

Reset TOTP

View Profile

Select Columns list:

- First Name
- Last Name
- Agency
- Status
- Email
- Identifier
- Start Date
- Termination Date
- Check all

Select only the columns you wish to see.

Page through the search results as needed.

Hover over the action button (⋮) then select **View Profile** to view a staff member's profile.

View as a table or as panels.

Intro to the Staff Member Workspace

Click < to return to the search results.

Click on the icons to Print, Expand or Collapse Panels.

Click the icon to see history.

Click **Done Editing** to save changes.

Click the pencil to add a photo.

Completion Requirements show the required elements still needed. **Additional Items** can be added by clicking on the link for each.

The **User Account** panel includes buttons to **Reset Credentials** or **Reset TOTP** for the user as well as to lock the user account.

The **Dissociate** button allows a user account to be dissociated from the Staff Member profile, after which a new user account can be created. This action requires a specific UWITS Role.

Staff Member Workspace

Profile

- Employment Profile
- User Account
- Contact Information
- Identifiers

Profile

CHARLTON, Emily

Female

Date of Birth

Employment Profile

Job Title	Staff Member Type	Employment Type	Employment Date Range
Case Manager	Case Manager	Permanent	07/01/2021 -
Full Time Equivalent	Taxonomy Type	Taxonomy Classification	Taxonomy Specialization
Full Time			

Relationships

No Items

+ Add Relationships

User Account

User ID: echarlton

UWITS Training

Reset Credentials Reset TOTP

Dissociate Lock Agency Access

Done Editing

Completion Requirements

- Add Social Security Number

Additional Items

- Define Employment Profile
- Manage Accounts and Roles
- Add Facility Assignment
- Add Professional Qualification
- Add Email
- Add Phone Number
- Add Address
- Add Identifier
- Add Language
- Add Checklist Item
- Add Relationship
- Add Training
- Add Note

Add Staff Member

Prefix

First

Preferred

Middle

Last

Suffix

Gender

Creating a New Staff Member

From the Staff Member Search Screen, click on the **+ Create New Staff Member** link.

In the box that appears, add the staff member's first name, last name and gender then click on the **Save** button.

The next screen will be the **Staff Member Workspace**. This workspace is arranged in panels. The panels are listed to the left of the screen. Collapse or expand the panels using either the arrow at the top, left corner of the panel or the buttons at the top, right of the screen.

The expand button (☰) button expands all panels and the collapse button (☷) tool collapses all panels.

Look to the list of **Completion Requirements** at the right side of the screen. As the elements noted in the **Completion Requirements** list are added, they will drop from the list. Each element listed must be entered before the **Staff Profile** can be considered complete. Without a completed profile, the staff member will not be available to select in any dropdown box, such as at the Intake or Treatment Team screens. In addition to the elements listed here, add at least one **Facility Assignment**. Clinicians should have **Professional Qualifications** added and must also have an **NPI Number**. Instructions are included below.

Staff Member Workspace

Done Editing

Profile

- Employment Profile
- User Account
- Facility Assignments
- Contact Information

Profile

BAR, Chocolate; Licensed Cocoa Sales Worker

Female

Date of Birth:

Completion Requirements

- Add Social Security Number

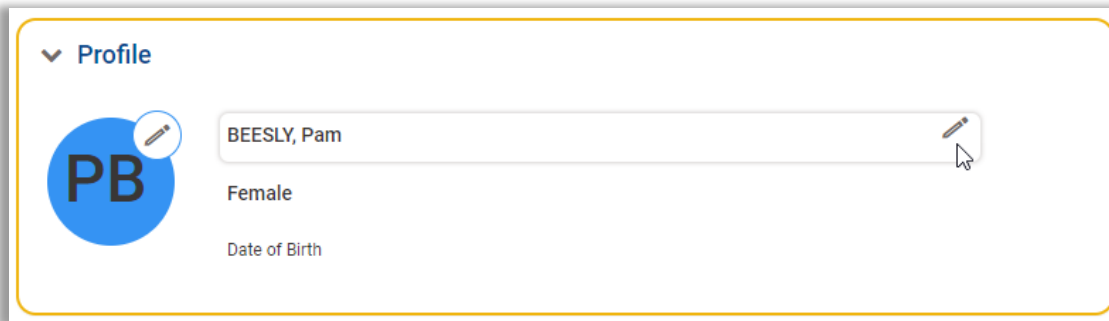
Additional Items

- Define Employment Profile
- Manage Accounts and Roles
- Add Facility Assignment
- Add Professional Qualification
- Add Email
- Add Phone Number
- Add Address
- Add Identifier

Employment Profile

Job Title: Licensed Cocoa Sales Worker Staff Member Type: Contracted Refreshments Provider Employment Type: Temporary Employment Date Range: 01/01/2020 -

▼ Profile



BEESLY, Pam

Female

Date of Birth

Staff Member Profile

At the **Profile** panel, hovering over the various elements will enable a pencil icon. Click on the pencil icon to add or edit the element.

Date of Birth is not required.

▼ Employment Profile

Job Title	Staff Member Type	Employment Type	Employment Date Range
Full Time Equivalent	Taxonomy Type	Taxonomy Classification	Taxonomy Specialization

Relationships

No Items

+ Add Relationships

Employment Profile

At the **Employment Profile** panel, once again hover over the various element to enable the pencil icon. Click on the pencil icon to add **Employment Start Date** and **Staff Member Type** which are required. Add any other information as desired.

Click on **+ Add Relationships** to specify the Clinical Supervisor or Manager for each staff member.

Social Security Number

Click on **Add Social Security Number** next.

Please know that although the Social Security Number field is required by the Staff Members module, it does NOT need to be the actual number. It is up to Agency's discretion as to using the staff member's actual Social Security Number or populating with 999-99-9999 or 000-00-0000.

Type

Social Security Number

Identifier

999-99-9999

Effective

1/1/2007 - Has end date

Note

Save Cancel

Email Address

Primary

Email Address

Click on **Add Email** next. At least one email address is required and at least one email address must have a checkmark in the **Primary** checkbox. This email address will be where the staff member will receive their UWITS login information.

▼ User Account

or

User Account

To set up the user account, click on **+ Add Account**

▼ User Account

User ID:

Enter a User ID, which will activate the **Create Account** button. Click on the newly activated button to create the new UWITS user account.

Caution: Once you enter a user ID you cannot edit this field. However, you can dissociate the account from the Staff Member Profile and create a new account. Instructions are included on page 3 of the **UWITS Administration Guide**.

▼ User Account

User ID: pbeesly

UWITS

Once you have created the staff member's account, the **User Account** panel now displays both a **System Roles** and an **Agency Roles** section.

To assign roles to the staff member click **+ Manage Roles**.

Manage Roles

Agency Roles

BEESLY, Pam

Available Roles

Assigned Roles

Hide Inherited Roles Show description

Search... [input]

Role Name	Description	Action
Admission (Full Access)	Full access to all options under Client List/Activity List/Admission.	+ (Add)
Admission (Read-Only)	Read-Only access to all options under Client List/Activity List/Admission.	+ (Add)
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.	+ (Add)
Agency Billing	Full access to the Agency Billing screens under Agency/Billing.	+ (Add)
Agency Events (Full Access)	This role will give the user the ability to enter not client specific Events at the Agency level.	+ (Add)
Agency Events (Read-only)	This role will give the user the ability to access Events at the Agency level in read only mode.	+ (Add)
Agency H835 Management	Allows access to the Agency H835 Management screen.	+ (Add)
Agency H999 Management	Allows access to the Agency H999 Management screen.	+ (Add)
Agency Invoicing (Full Access)	Full access to the Invoicing screens used for Cost Reimbursement and located under Agency Billing.	+ (Add)
Agency Invoicing (Read-Only)		+ (Add)

Role Name	Description	Action
Clinical (Full Access)	Full access to all clinical options under the Client List/Activity List.	- (Remove)

✓ I am done

Show description

Search... [input]

Click on the + sign next to an **Agency Role** to move that role to the **Assigned Roles** box.

When all roles have been assigned for this user click **✓ I am done**.

Click on the - sign next to an **Assigned Role** to remove that role and return it to the **Available Roles** box.

To view a complete list of available roles, see the **UWITS Administration Guide**, beginning on page 18.

User Account
 User ID: pbeesly

 Reset Credentials Reset TOTP

UWITS

 Dissociate Lock Agency Access

System Roles

+ Manage Roles

Agency Roles

- Client Diagnosis (Full Access)
- Clinical (Full Access)
- Clinical Supervisor
- Document Management (Full Access)
- SignOff And Finalize Treatment Plan
- SSRS Agency Reader
- View Consented Clients
- View Scheduler

At this point, all chosen UWITS Roles are now shown in the **User Account** panel.

Multi-agency roles are also called **System Roles**. If a staff member is assigned any System Roles, their Agency Navigator will be able to view them in the Staff Member profile but will not be able to edit. To update Multi-Agency Roles, please email UWITS Support.

Reset Credentials Reset TOTP

UWITS

 Dissociate Lock Agency Access

System Roles

- Access all oversight agencies in read-write mode
- Authorization (Full Access)
- Unique Client Eligibility
- View Scheduler

+ Manage Roles

Agency Roles

- Client Diagnosis (Full Access)
- Clinical (Full Access)
- Clinical Supervisor
- Document Management (Full Access)
- SignOff And Finalize Treatment Plan
- SSRS Agency Reader
- View Consented Clients
- View Scheduler

Facility Assignments

Next, click on **Add Facility Assignment** under the **Additional Items** list to assign the staff member access to a facility.

At this screen, click on the name of the facility to assign it to a staff member. The selected facility name will move to the box on the right.

Add an Effective Date and uncheck the box next to Has End Date.

Selecting at least one facility and adding an Effective Date will activate the Save button. Make any other selections then click the Save button.

Professional Qualifications

Click on **Add Professional Qualification** under the **Additional Items** list to enter a degree, certification, or license held by the staff member.

Select the **Category**, whether the qualification is a Certification, Degree or License.

Select the **Type**, which is filtered based on the category chosen.

Enter the Effective Dates, if applicable, and any other information as desired. Click Save.

Tip: After completing the Professional Qualifications panel if you click **Include in Display Name**, the Profile panel now shows the user's credentials next to their name.

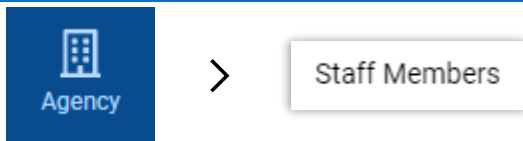
Signed notes will display staff credentials with their name.

Additional Items

The remaining items under the **Additional Items** section allow the user to customize the staff member's profile with relevant data. None of these are required, although you may complete any panels which you find useful. To do so, under the **Additional Items** section click the link to add the desired item. A panel will open with relevant fields. Fill out each required field and add any additional information as desired. Click the **Save** button to save the element.

Language	Document the various languages that a staff member speaks and note their proficiency using a Likert Scale.
Checklist Items	Create a checklist of items, such as a background check, which must be completed for the staff member.
Notes	Notes allow documentation of anything needed. The box automatically expands as you type. As the note is saved a date stamp is added.
Training	Enter any trainings that the staff member has completed and the date of completion.

Staff Member Administrative Actions

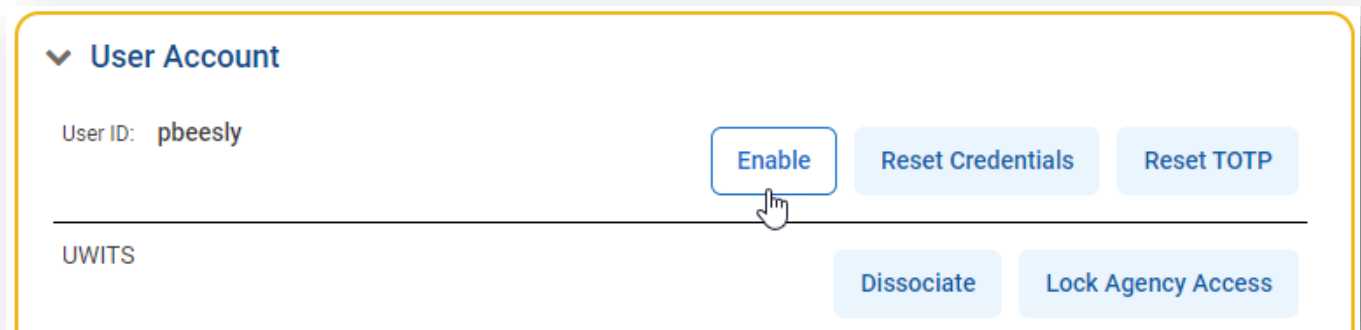


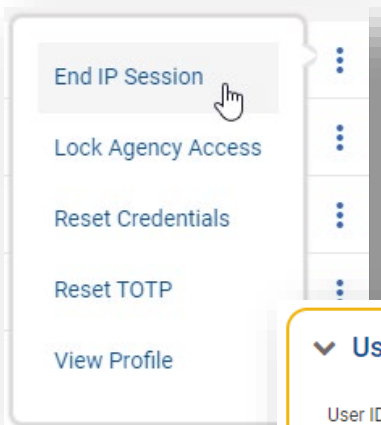
To complete any of the following Administrative actions, begin by locating the user in the Staff Members module by clicking on Agency then Staff Members.

Enable a User Account

When a Staff Member has tried to log into UWITS unsuccessfully three times, they will have disabled their account. To assist, begin by navigating to the Staff Member module.

Search for the staff member, hover over the action button (⋮) then click on the **View Profile** option. The Staff Member Workspace will automatically open in edit mode. Scroll to the User Account panel and click on the **Enable** button. Next, click the ✓ **Done Editing** button. The staff member will receive an email to let them know their account was enabled.

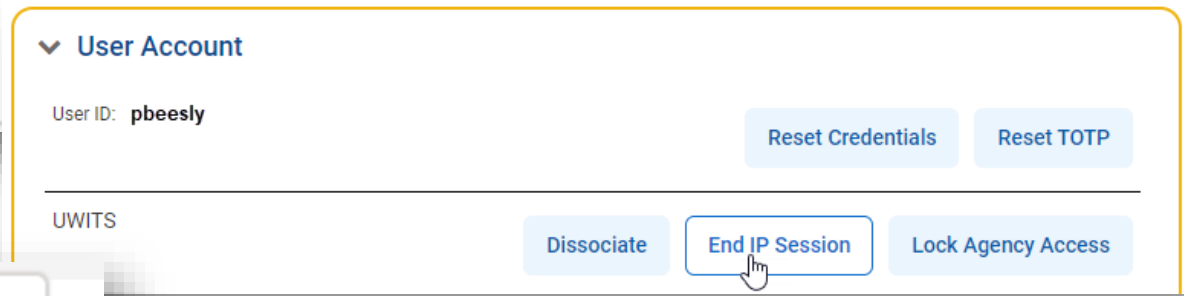




End IP Session

When a Staff Member neglects to log out of UWITS properly before leaving work or switching to a different computer, UWITS will not allow them to login to UWITS on the different computer until the active session has timed out or until it has been cleared.

To clear an active session, search for the Staff Member at the **Staff Member Search** screen. Hover over the action button (⋮) then click on **End IP Session**. Alternatively, you may also click on the **View Profile** option, scroll to the **User**

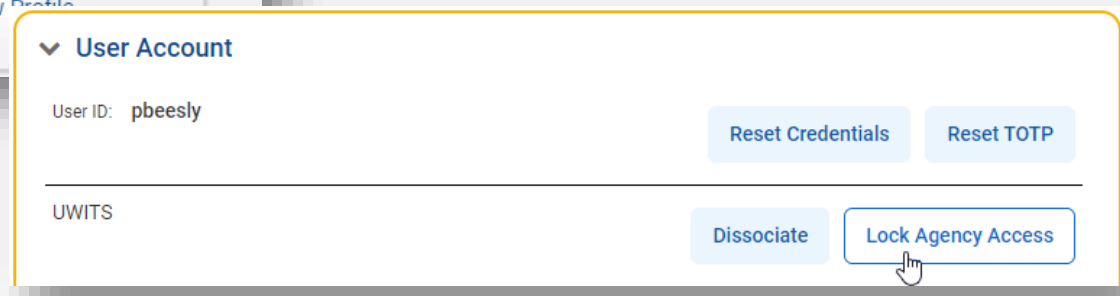
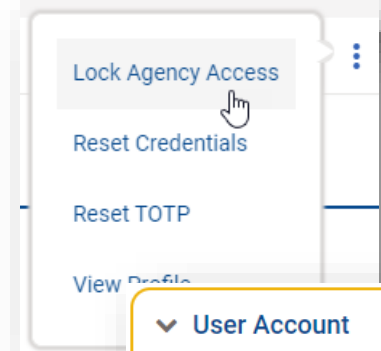


Account panel, click on the **End IP Session** button then click on the ✓ **Done Editing** button.

Lock (or Unlock) a User Account

Both Agency Administrators and WITS Administrators can lock Staff Members out of UWITS intentionally. This is

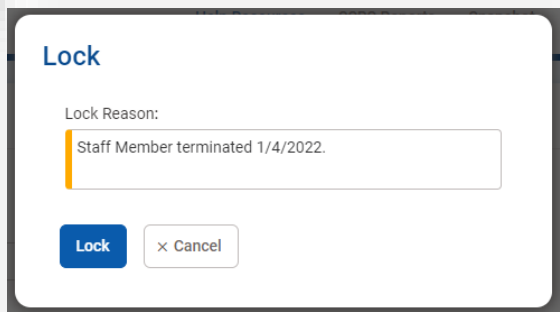
used when a staff member leaves the organization or needs to be temporarily locked out of UWITS for any reason. Each night, UWITS automatically locks user accounts which have not been used in the last 90 or more days. Contact the UWITS Support box if you require assistance.

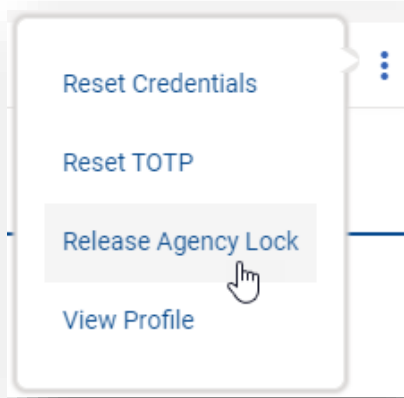


Lock a User Account

To lock a Staff Member's account, first search for the staff member, hover over the action button (⋮) then click on the **Lock Agency Access** option. Enter the reason that you are locking this Staff Member's account and click Lock. At this point the Staff Member account is now locked and cannot log in to UWITS.

Alternatively, you may also click on the **View Profile** option, scroll to the **User Account** panel, click on the **Lock Agency Access** button then click on the ✓ **Done Editing** button. At this point the Staff Member account is also now locked and cannot log in to UWITS.



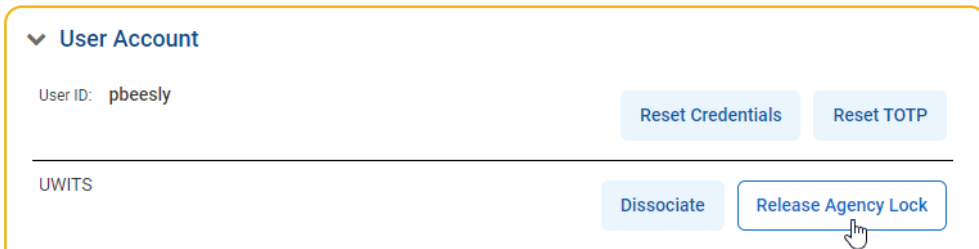
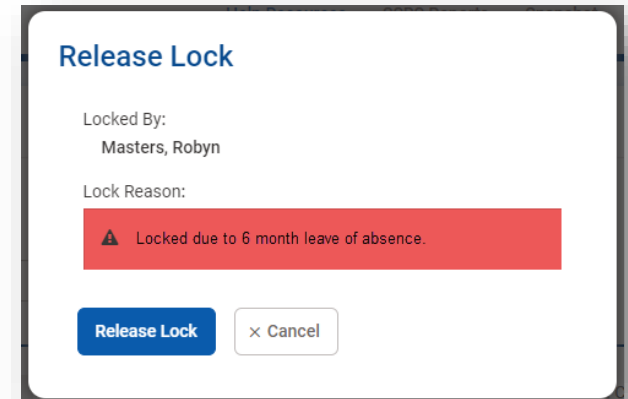


Unlock a User Account

To unlock a Staff Member's account, first search for the staff member, hover over the action button (⋮) then click on the **Release Agency Lock** option.

A box with the original reason that this Staff Member's account was locked will appear. Take note of the original reason and ensure that it is no longer valid before clicking on **Release Lock**. At this point the Staff Member account is now unlocked and the staff member can again log in to UWITS.

Alternatively, you may also click on the **View Profile** option, scroll to the **User Account** panel, click on the **Release Lock** button then click on the ✓ **Done Editing** button. At this point the Staff Member account is now unlocked and the staff member can again log in to UWITS.



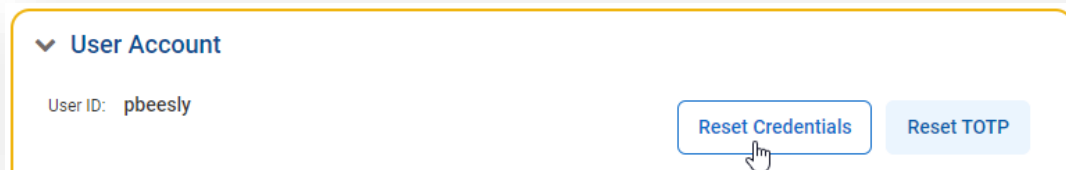
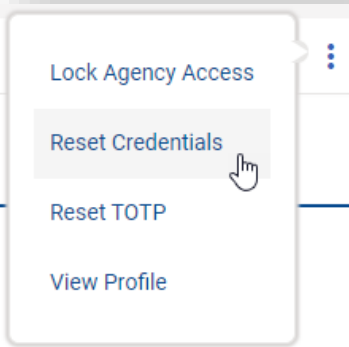
Reset Credentials

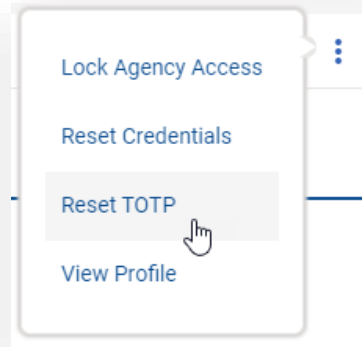


Important Note: User accounts can also be locked at the System level. To unlock an account at the System level, please email UWITS Support.

To allow the user to reset their password, first search for the staff member, hover over the action button (⋮) then click on the **Reset Credentials** option. The Staff Member will receive an email with instructions to reset their password.

Alternatively, you may also click on the **View Profile** option, scroll to the **User Account** panel, click on the **Reset Credentials** button then click on the ✓ **Done Editing** button.

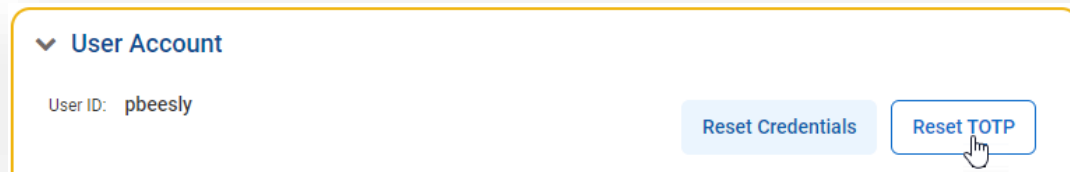




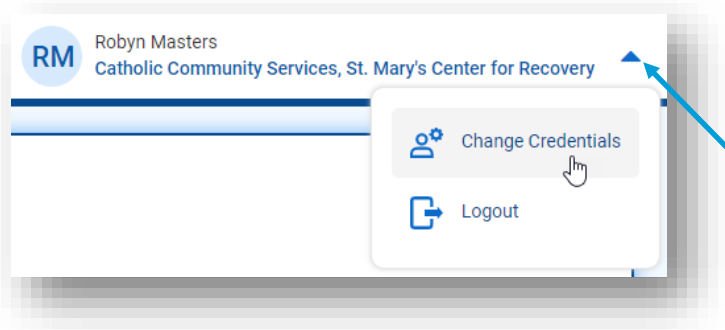
Reset TOTP (Multifactor Authentication)

When a staff member obtains a new phone (or at any other time), to allow the user to reset their TOTP, first search for the staff member, hover over the action button (⋮) then click on the **Reset TOTP** option. The Staff Member will receive an email with instructions to reset their TOTP.

Alternatively, you may also click on the **View Profile** option, scroll to the **User Account** panel, click on the **Reset TOTP** button then click on the ✓ **Done Editing** button.



Tip! Any user who has not previously answered their security question will be prompted to answer it as soon as they log into UWITS for the first time.



Password and Security Question

To change your **Password** and/or your **Security Question**, hover over the triangle near your name in the top left hand corner of the screen. Next, click on **Change Credentials**.

Select a **Security Question** from the drop-down box then enter a word or phrase into the **Answer** box.

Enter your **Old Password**.

Then enter your **New Password** and ensure that you have typed it correctly by typing it again into the **Confirm Password** box.

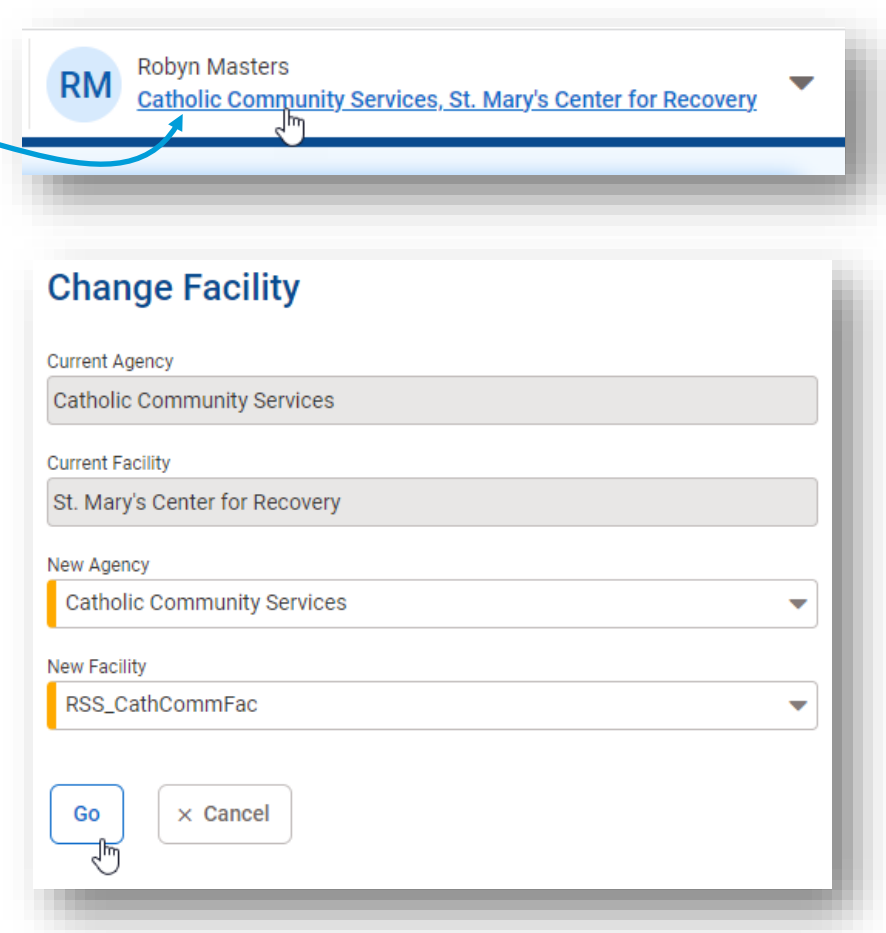
Finally, click on the **Change** button.

A screenshot of the 'Change Credentials' form in the UWITS system. The form is titled 'Change Credentials' and shows the user ID as 'rmasters'. It includes a 'Security Question' dropdown menu with the selected question 'What breed is your dog?'. Below this is an 'Answer' text box containing the word 'beagle'. There is a checkbox for 'Show Password/PIN' which is currently unchecked. Below the checkbox are three text input fields: 'Old Password', 'New Password', and 'Confirm Password'. At the bottom of the form are two buttons: a blue 'Change' button and a white 'Cancel' button with a close icon.

Change Context

Context is the word used to describe your currently selected Agency plus Facility. This is shown at the top left corner of the UWITS screen, just under your name.

If you have been assigned access to more than one facility then you will be able to change your Context by clicking on the current Context.



RM Robyn Masters
Catholic Community Services, St. Mary's Center for Recovery

Change Facility

Current Agency
Catholic Community Services

Current Facility
St. Mary's Center for Recovery

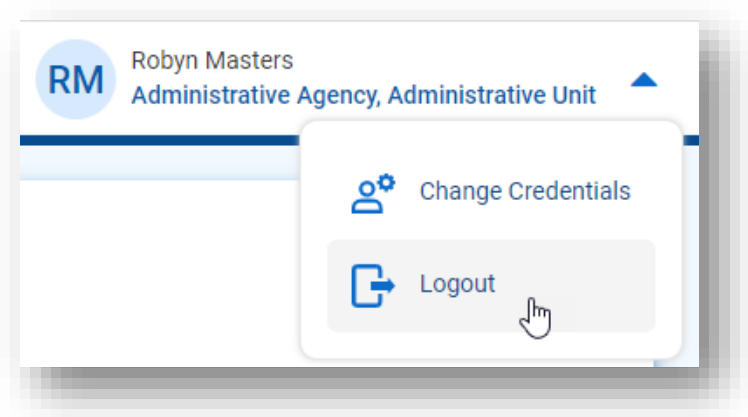
New Agency
Catholic Community Services

New Facility
RSS_CathCommFac

Go × Cancel

Select a **New Facility** from the dropdown box then click on the **Go** button.

Note: If you have access to more than one Agency then you can select a **New Agency** here as well—but this is not common.



RM Robyn Masters
Administrative Agency, Administrative Unit

Change Credentials

Logout

Logging Out of WITS

To log out of UWITS, hover over the triangle near your name in the top left hand corner of the screen. Next, click on the **Logout** button in the top right hand corner of your screen. The Logout screen will appear. Click **Yes** to log out.