# Staff Member Module Guide

How to create, update and deactivate a staff member profile and the associated user account.

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## Introduction

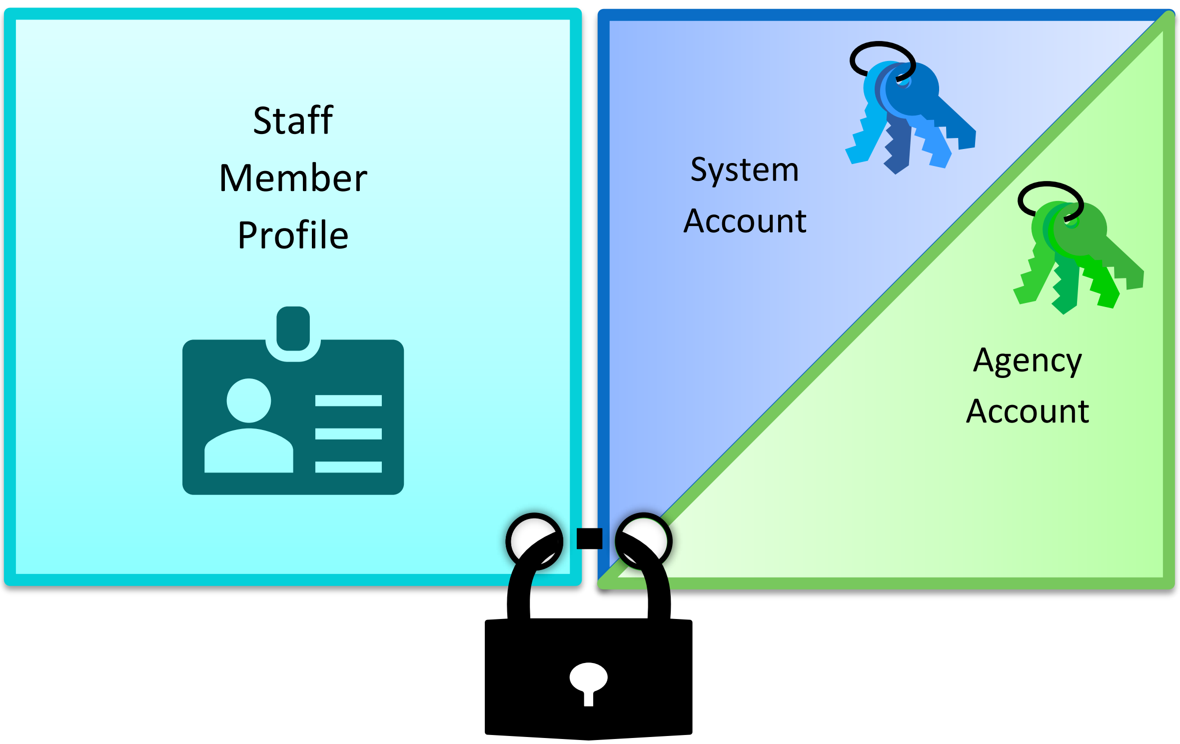
Every UWITS user has a both a System Account and an Agency Account. These are joined together and work as one. They also have a Staff Member Profile.

**UWITS Roles** may also be 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.

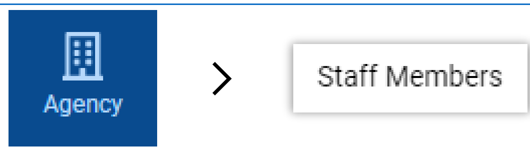
**The Staff Member Profile** includes information about the Staff Member. This includes their name, email address, employment dates and employment type. Additional information may also be included, such as an NPI number, educational background and credentials. Staff Member profiles are managed by the Agency Navigators.

**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** 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.



# Staff Member Search Screen

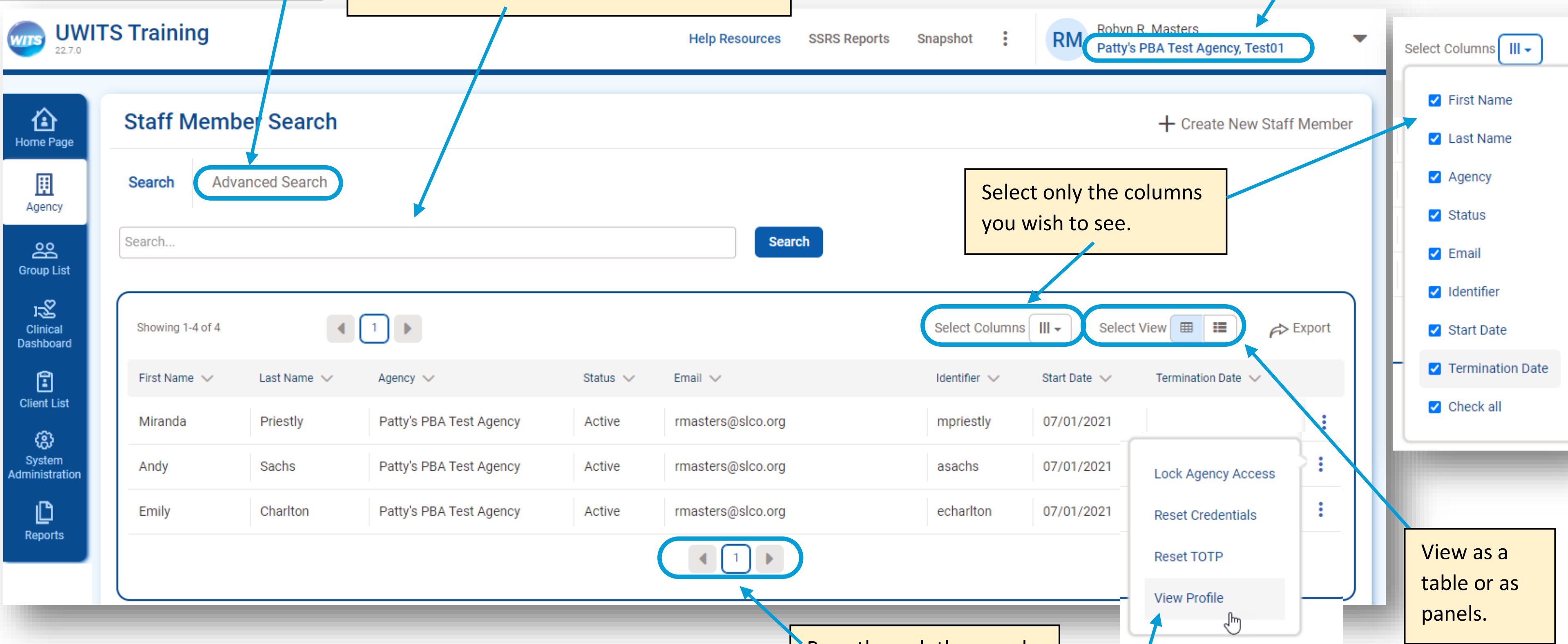



To navigate to the **Staff Members** module, click on the **Agency** button in the blue bar to the left then click on **Staff Members**.

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**.




Select only the columns you wish to see.

View as a table or as panels.

Page through the search results as needed.

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

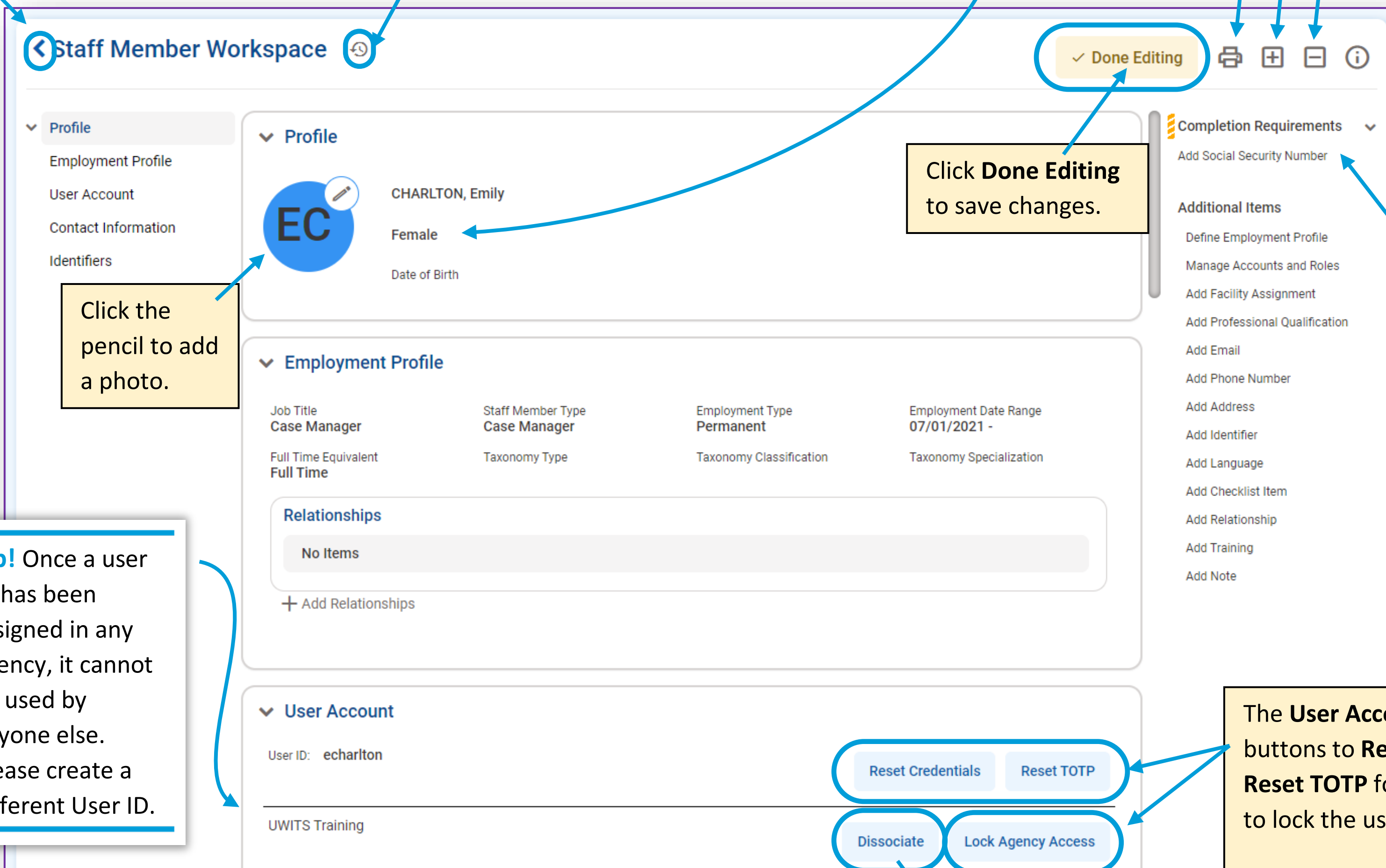
# Intro to the Staff Member Workspace

**Tip!** Please know that while the **Gender** field is required by the Staff Members module, it does NOT need to be the actual data. It is up to Agency's discretion as to whether to identify your staff member's actual Gender or populating with **Not Collected.**

Click **<** to return to the search results.

Click the icon to see history.

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




Click **Done Editing** to save changes.

Click the pencil to add a photo.

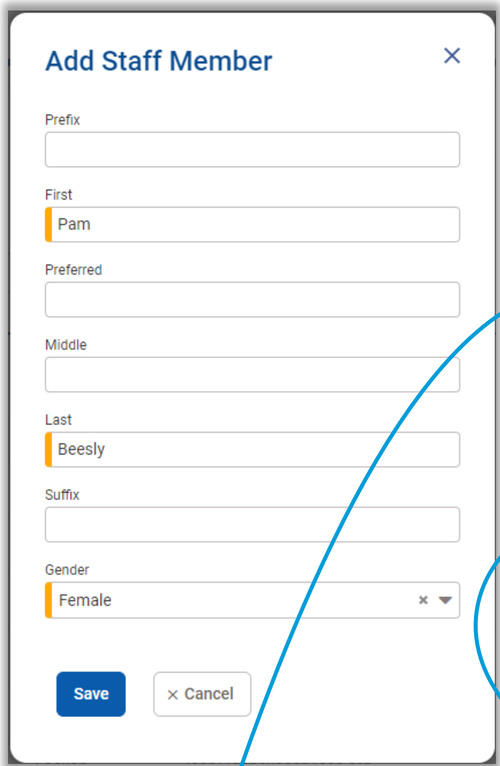
**Completion Requirements** show the required elements still needed.

**Additional Items** can be added by clicking on the link for each.

**Tip!** Once a user ID has been assigned in any agency, it cannot be used by anyone else. Please create a different User ID.

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.




# Creating a New Staff Member

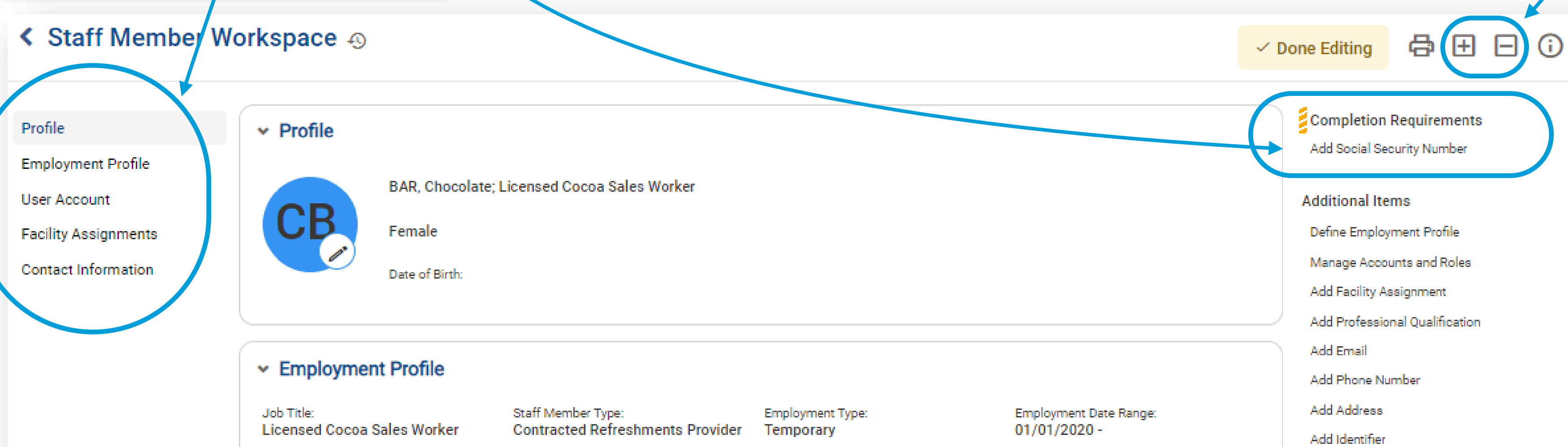
From the Staff Member Search Screen, click on the **+ Create New Staff Member** link.

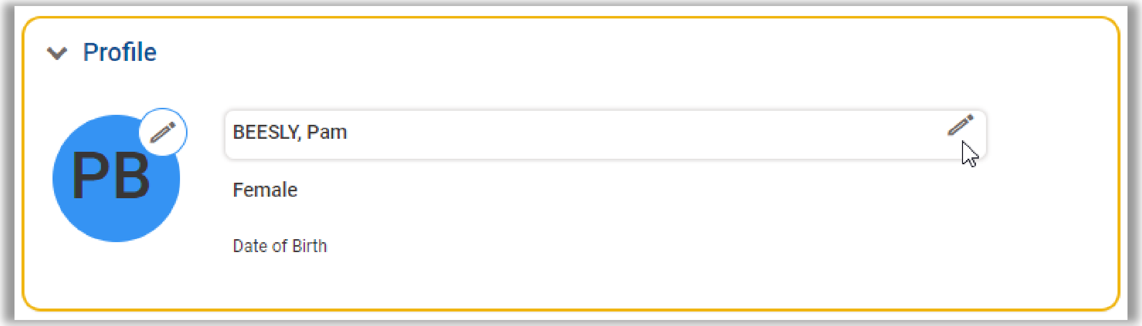
In the box that appears, add the staff member's first name, last name and gender then click on the **Save** button.

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.

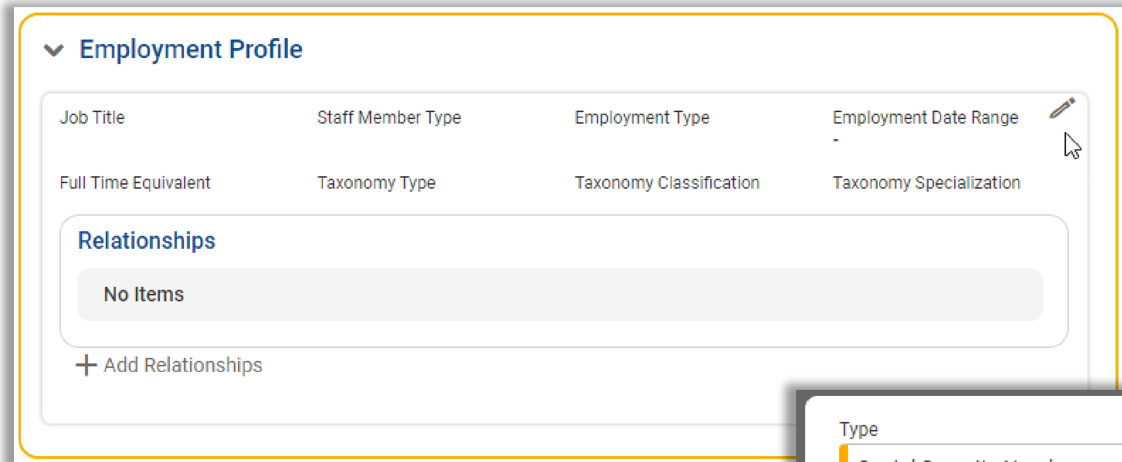





## Staff Member Profile

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

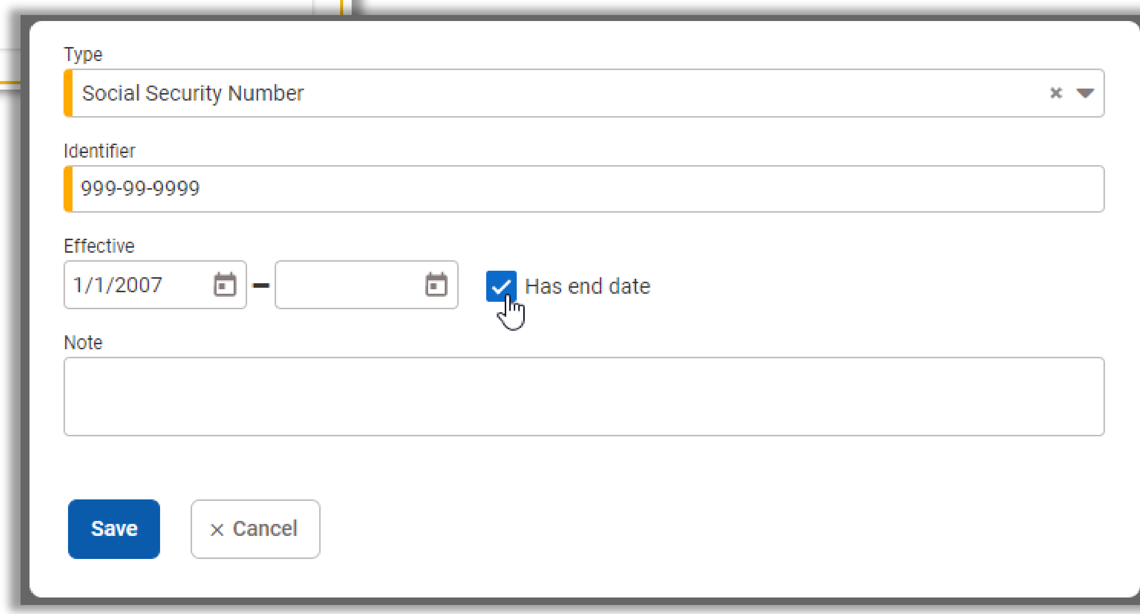
At the **Employment Profile** panel, once again hover over the various elements to enable the pencil icon. Click on the pencil icon to add **Employment Start Date** and **Staff Member Type** which are required. Add any other information as desired.

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.

**Tip!** 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.

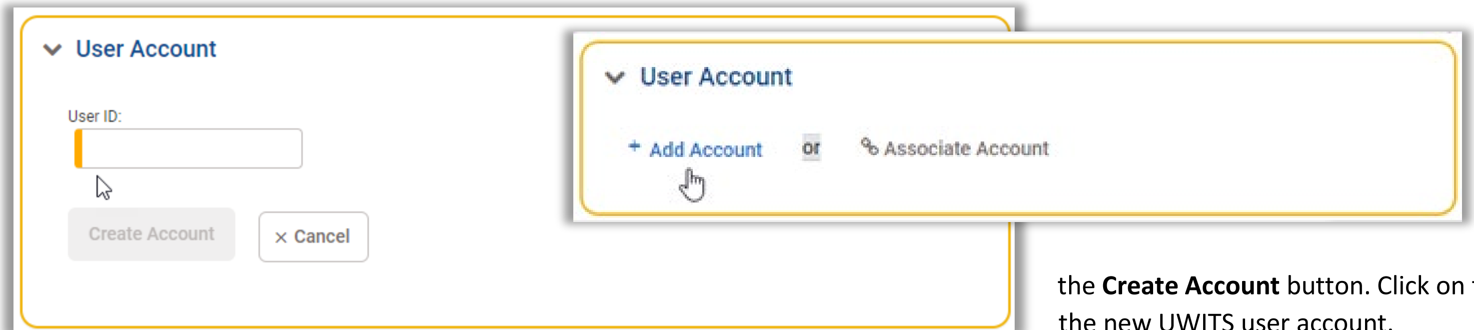


## Email Address


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.

## Phone Numbers

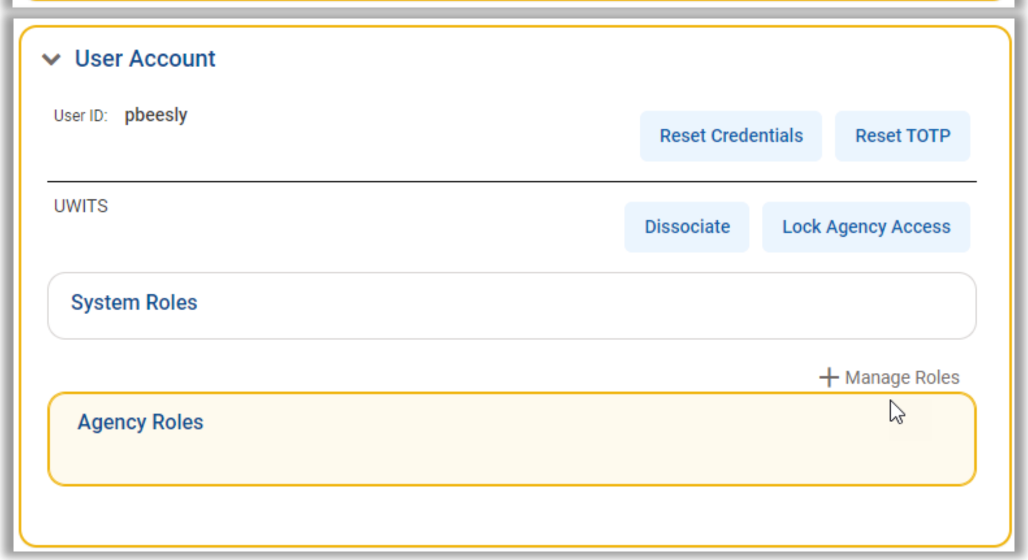
Adding phone numbers is optional, except for users designated as the **Agency EDI Contact**, who must have a phone number added to their Staff Member Profile. To add a phone number, click on **+ Phone Numbers**. Enter the phone number **Type** and then the **Number**. Check the **Primary** box, if desired then click the **Save** button.




## User Account

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

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



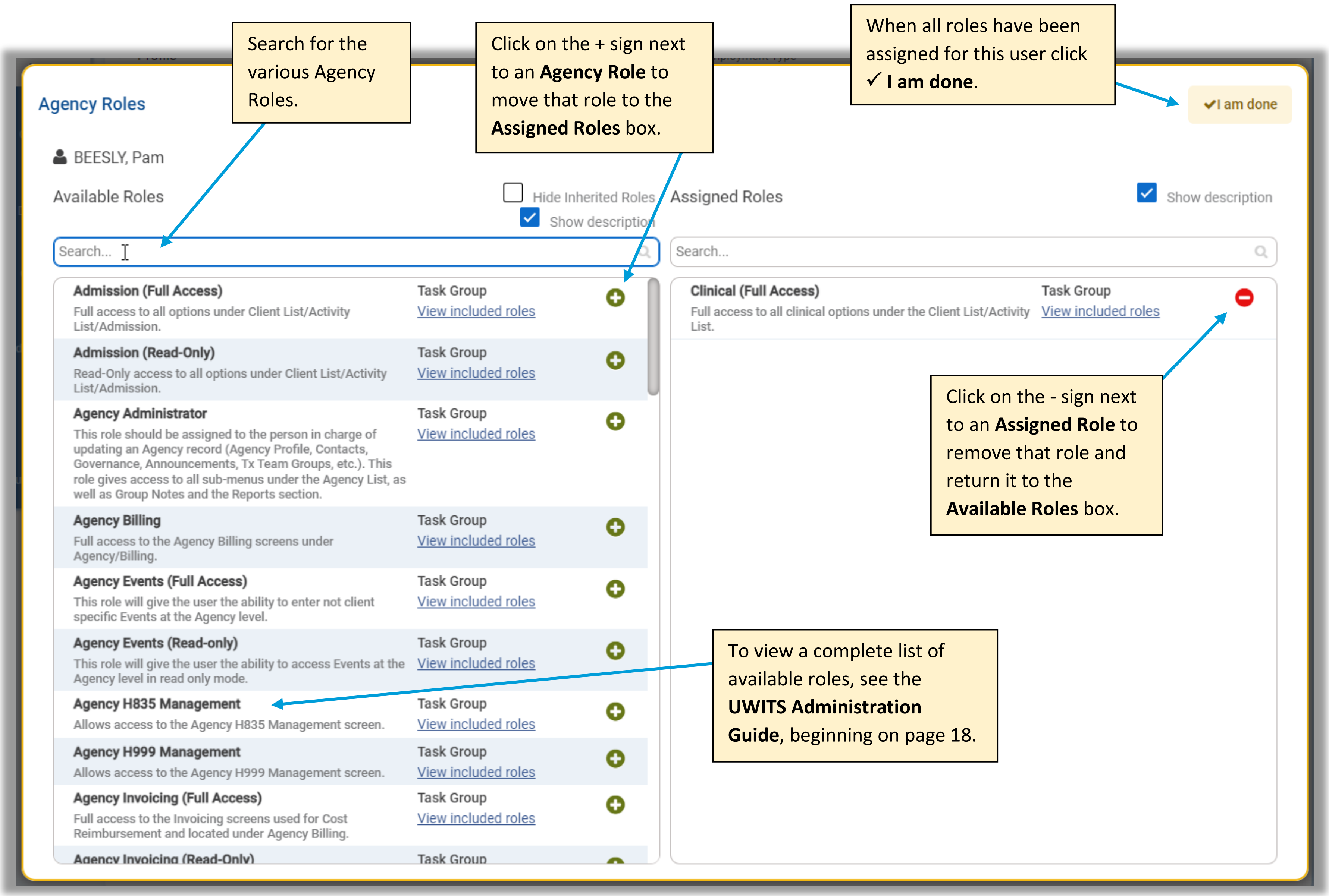

**Caution:** Once you enter a user ID you cannot edit this field. However, you can dissociate the account from the Staff Member Profile and create a new account. Instructions are included on page 3 of the **UWITS Administration Guide**.

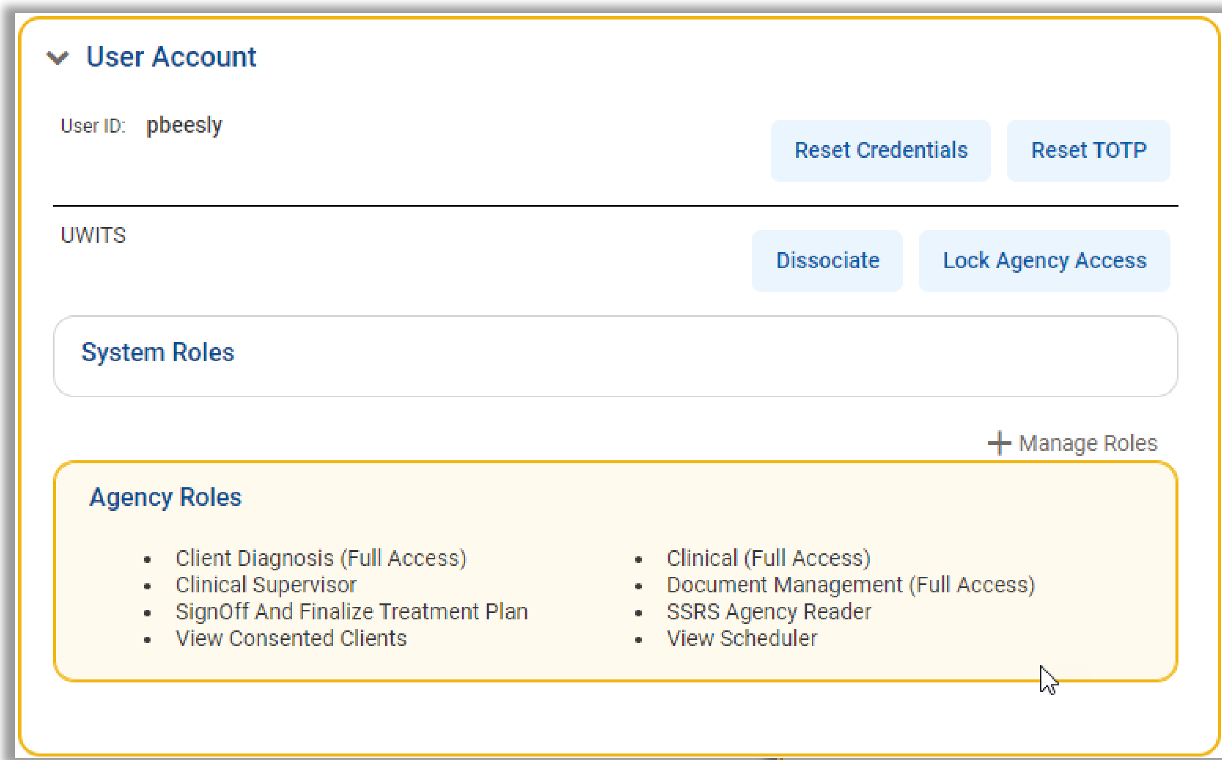
Once you have created the staff member's account, the **User Account** panel now displays both a **System Roles** and an **Agency Roles** section.

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

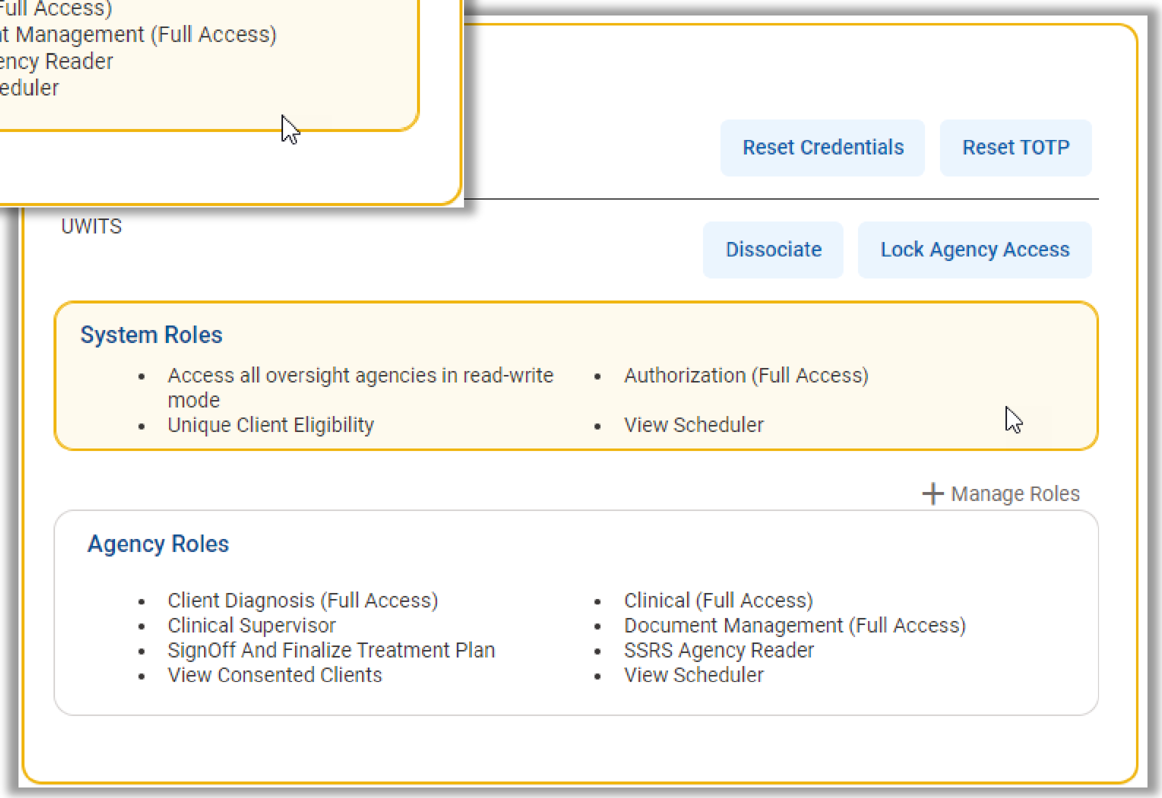
**Tip!** Once a user ID has been assigned in any agency, it cannot be used by anyone else. Please create a different User ID.

## Manage Roles






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.

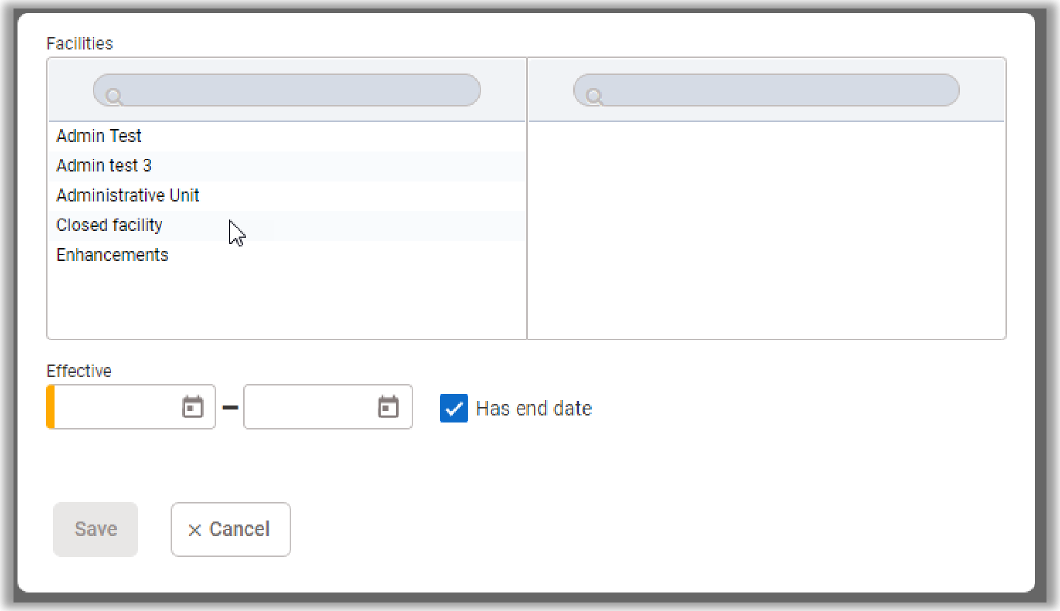
## Facility Assignments

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

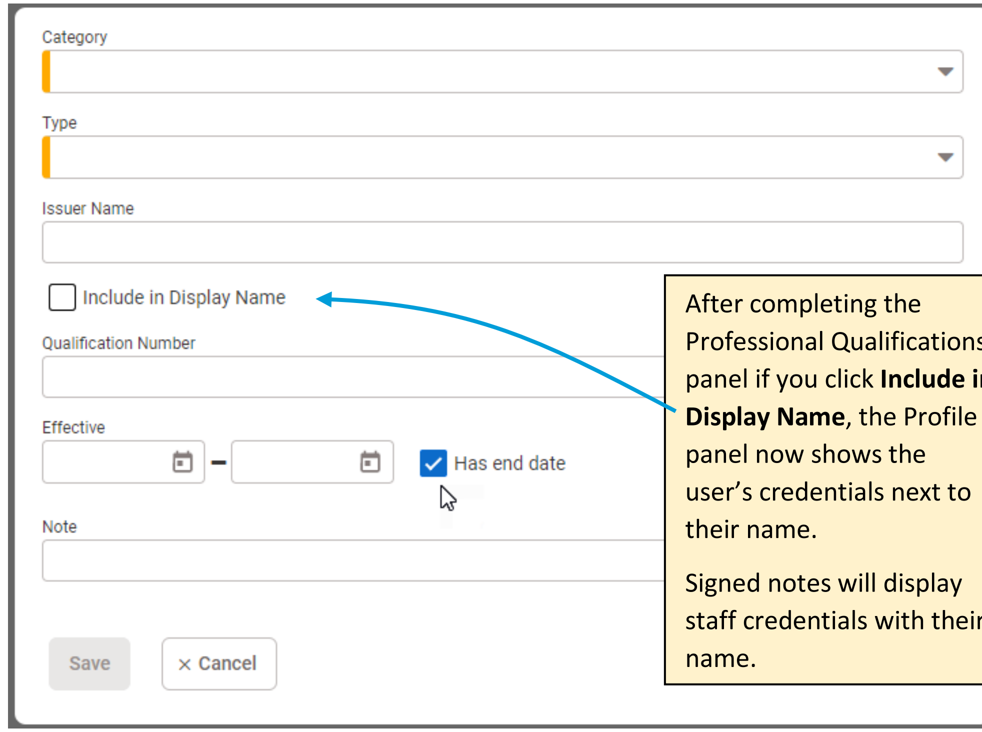
Click on **Add Professional Qualification** under the **Additional Items** list to enter a certification, degree or license held by the staff member.

Select the **Category**, whether the qualification is a Certification, Degree or License. The **Type** dropdown box will be filtered based on the Category chosen.

Carefully select the **Type**, ensuring that what you select matches the staff member's Certificate, Diploma or DOPL precisely.

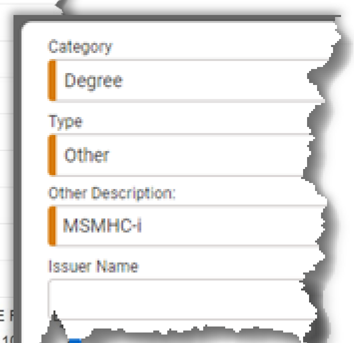
**Tip!** For staff who have neither a certification nor a diploma, and who aren't listed on DOPL, please follow the Medicaid Manual or contact us for guidance.

Next, enter the **Effective Date**. Enter an End Date, if applicable, and enter any other information as desired. Click **Save**.




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.


### Adding a Professional Qualification Manually

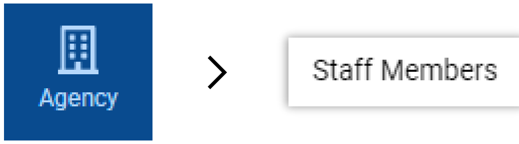
When the qualification you wish to add is not listed in the **Type** box, you may select Other from the **Type** box. At that point, an additional box labeled **Other Description** will be displayed on the screen. Enter the qualification into the Other Description box and then continue with these instructions.

## 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

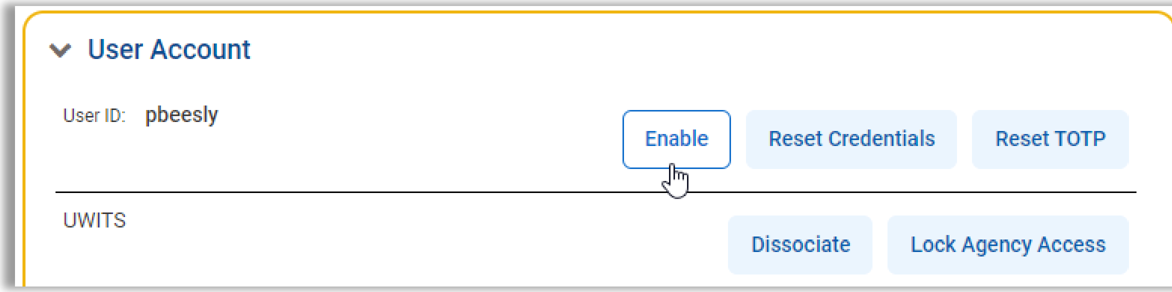


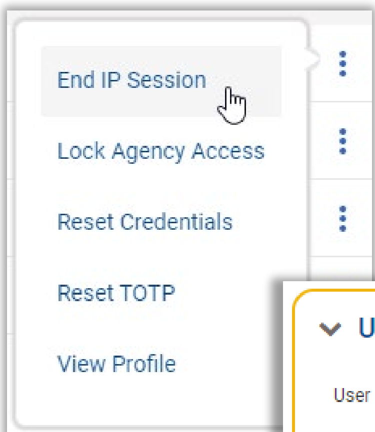

To complete any of the following Administrative actions, begin by locating the user in the Staff Members module by clicking on Agency then Staff Members.

## 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.

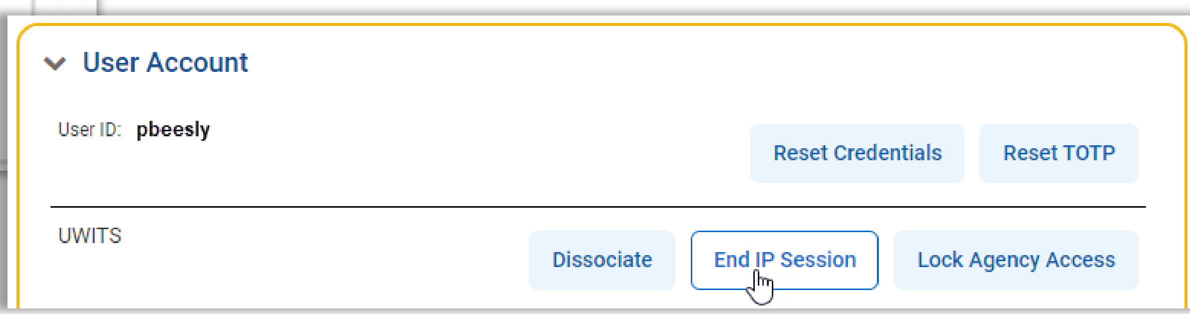



## End IP Session

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.

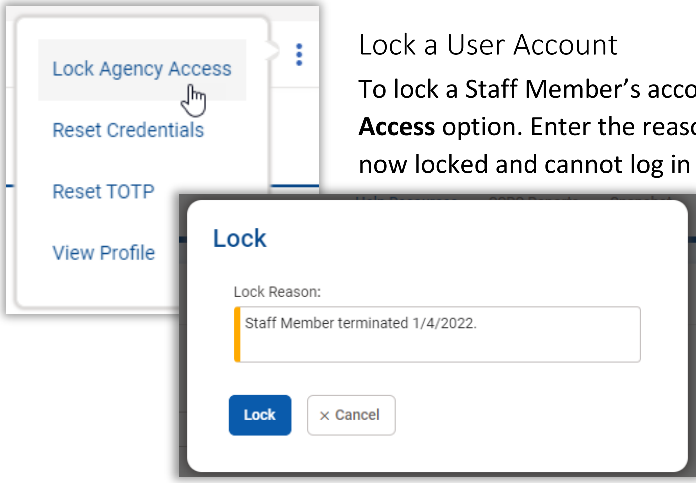
To clear an active session, search for the Staff Member at the **Staff Member Search** screen. Hover over the action button ( ⋮ ) then click on **End IP Session**. Alternatively, you may also click on the **View Profile** option, scroll to the **User Account** panel, click on the **End IP Session** button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

**Note:** If a user has not accessed their account since 1/1/2021, please create a new account for them rather than reactivating their previous account.




### 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.

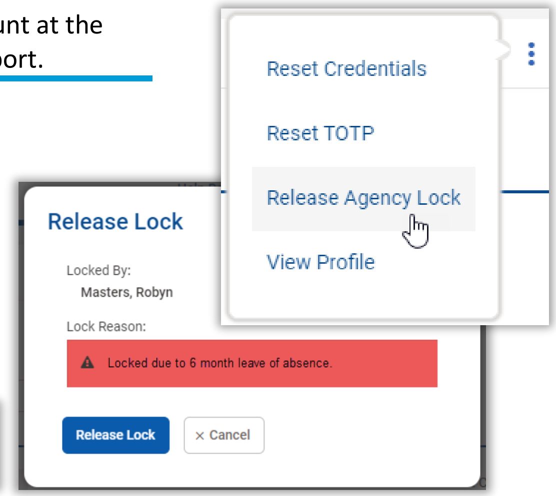
Alternatively, you may also click on the **View Profile** option, scroll to the **User Account** panel, click on the **Lock Agency Access** button then click on the ✓ **Done Editing** button. At this point the Staff Member account is locked and cannot be used to login to UWITS.


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

### 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 Agency 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.

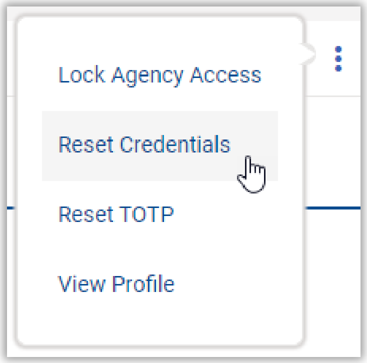

## When a Staff Member Leaves

At minimum, when a staff member leaves your agency, their UWITS user account must be locked in a timely manner and a Termination Date must be added to their staff member profile.

- Locking user accounts quickly will prevent former employees from logging in to UWITS inappropriately.
- Adding a Termination Date will remove that staff member's name from the various staff member dropdown boxes peppered throughout UWITS. This will prevent that former staff member from being selected in error.

## Courtesy Notification Emails

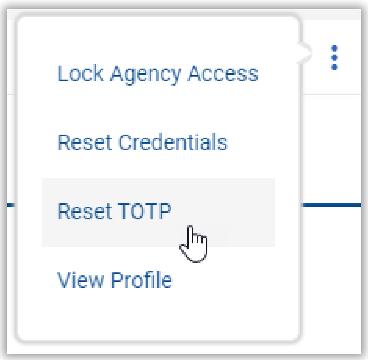
Staff members who have not logged in to UWITS for 60 days will now receive an email notification as a courtesy. If they do not log in at least once during the next 30 days then another email will be sent and their account will be locked.




## Reset Credentials

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.

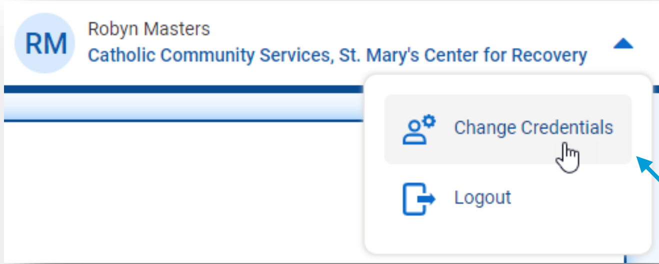
Alternatively, you may also click on the **View Profile** option, scroll to the **User Account** panel, click on the **Reset Credentials** button then click on the ✓ **Done Editing** button.


## Reset TOTP (Multifactor Authentication)

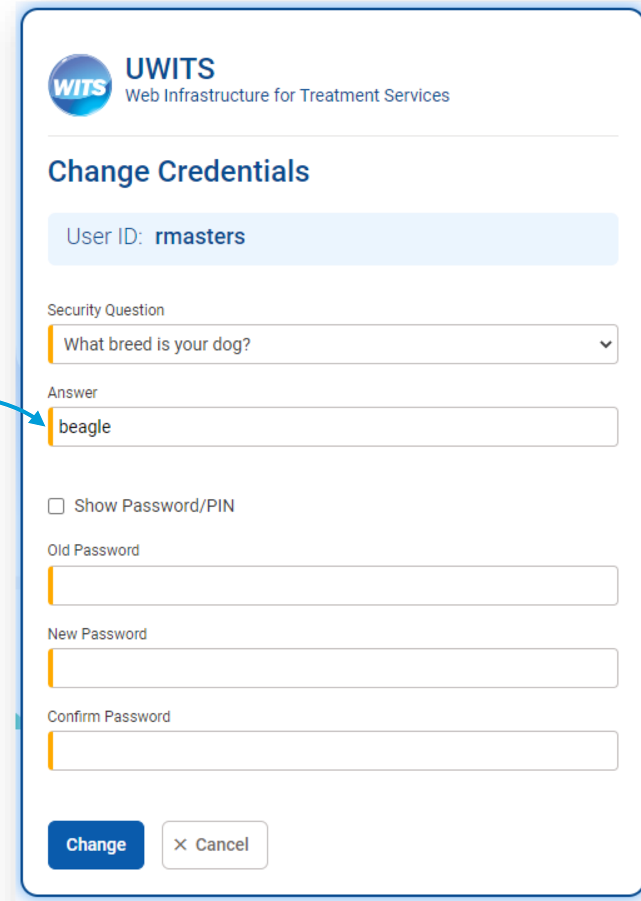
When a staff member obtains a new phone (or at any other time), to allow the user to reset their TOTP, first search for the staff member, hover over the action button ( ⋮ ) then click on the **Reset TOTP** option. The Staff Member will receive an email with instructions to reset their TOTP.

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.




## 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**.

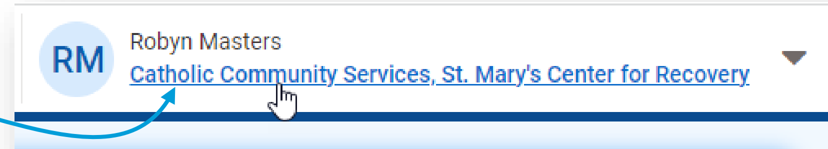
Then enter your **New Password** and ensure that you have typed it correctly by typing it again into the **Confirm Password** box.

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

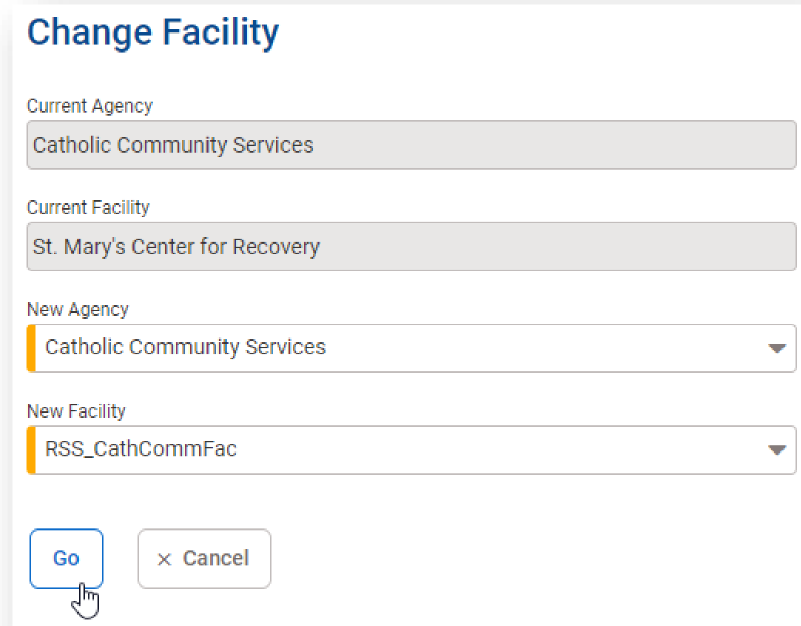
**Tip!** Any user who has not previously answered their security question will be prompted to answer it as soon as they log into UWITS for the first time.

## 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.

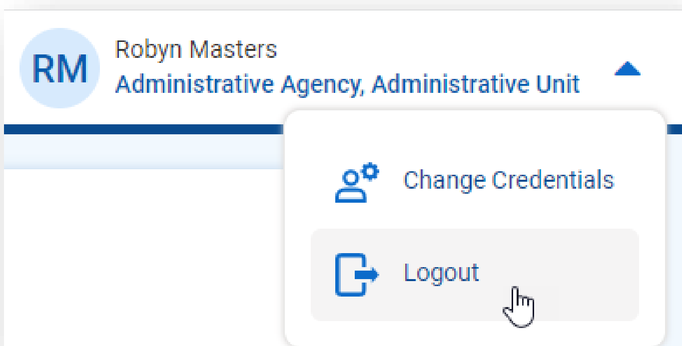



If you have been assigned access to more than one facility then you will be able to change your Context by clicking on the current Context.




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.




## 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.