



Staff Member Module Guide

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

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Introduction

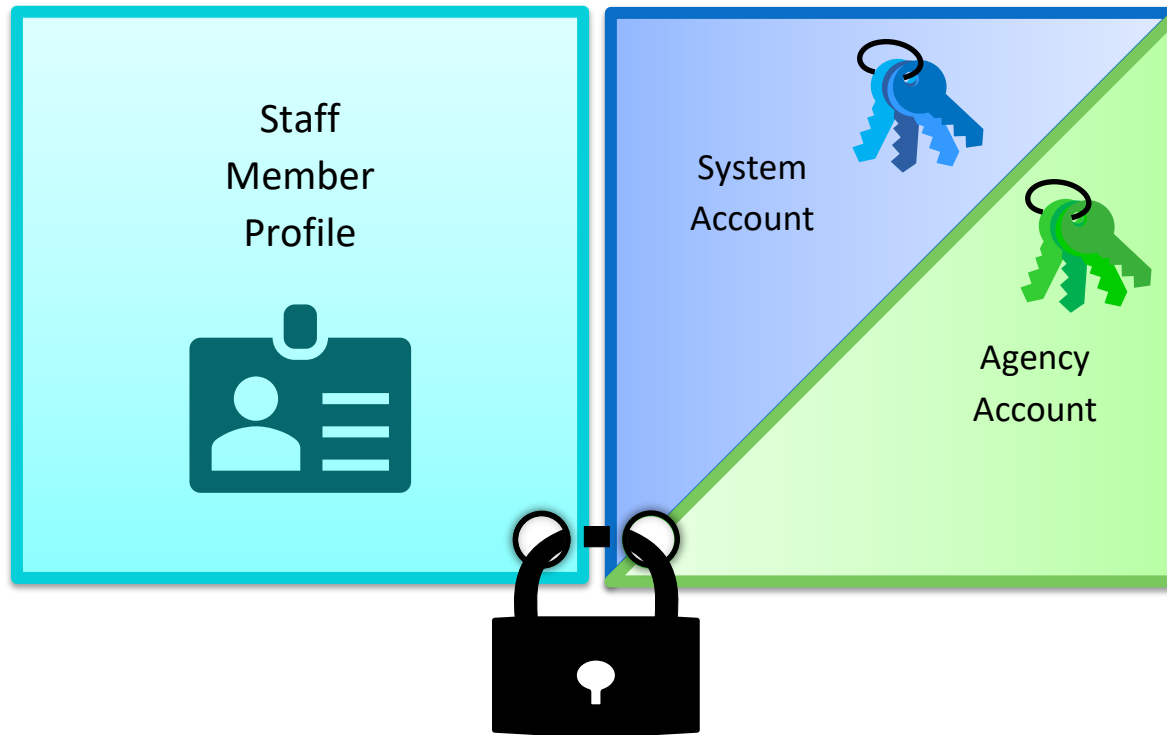
Every UWITS user has both a System Account and an Agency Account. These are joined together and work as one. They also have a Staff Member Profile.

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.

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.



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**.

The screenshot shows the 'Staff Member Search' interface. At the top left is the 'WITS UWITS Training 22.7.0' logo. The top right shows the user 'Robyn B. Masters' and the agency 'Patty's PBA Test Agency, Test01'. A sidebar on the left contains navigation options: Home Page, Agency, Group List, Clinical Dashboard, Client List, System Administration, and Reports. The main area has a 'Staff Member Search' title, a 'Search' button with an 'Advanced Search' dropdown, and a search input field. Below the search field is a table of results. The table has columns for First Name, Last Name, Agency, Status, Email, Identifier, Start Date, and Termination Date. Three rows are visible, all for 'Patty's PBA Test Agency' and 'Active' status. Below the table are pagination controls showing 'Showing 1-4 of 4' and a page number '1'. To the right of the table are controls for 'Select Columns', 'Select View', and 'Export'. A 'Create New Staff Member' button is in the top right. A 'Select Columns' dropdown menu is open on the right, listing various fields with checkboxes. A context menu is open over the table, showing options like 'Lock Agency Access', 'Reset Credentials', 'Reset TOTP', and 'View Profile'. Several callout boxes provide instructions: 'Use the Advanced Search to select search criteria and save to your computer via a cookie.' points to the 'Advanced Search' button; '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.' points to the search input field; 'The Staff Member Search screen lists all UWITS users for the current Agency.' points to the agency name; 'Select only the columns you wish to see.' points to the 'Select Columns' dropdown; 'View as a table or as panels.' points to the 'Select View' dropdown; 'Page through the search results as needed.' points to the pagination controls; and 'Hover over the action button (⋮) then select View Profile to view a staff member's profile.' points to the 'View Profile' option in the context menu.

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.

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	

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 the pencil to add a photo.

Click **Done Editing** to save changes.

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.

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 **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.

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

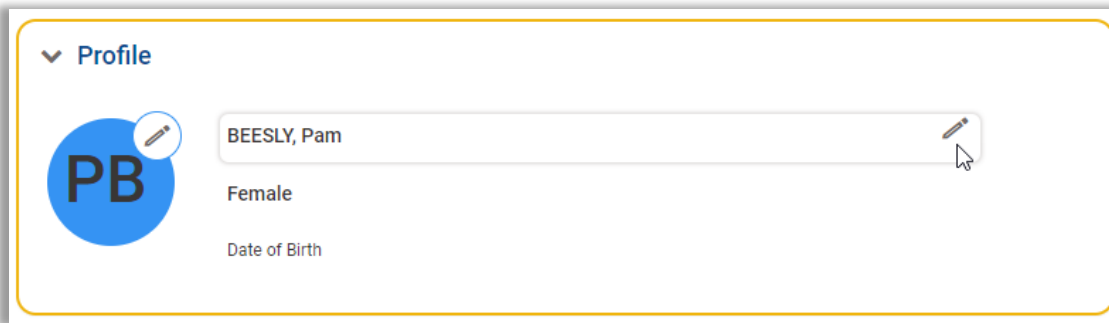
Job Title: Licensed Cocoa Sales Worker

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 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.

Type

Social Security Number

Identifier

999-99-9999

Effective

1/1/2007 - Has end date

Note

Save Cancel

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.

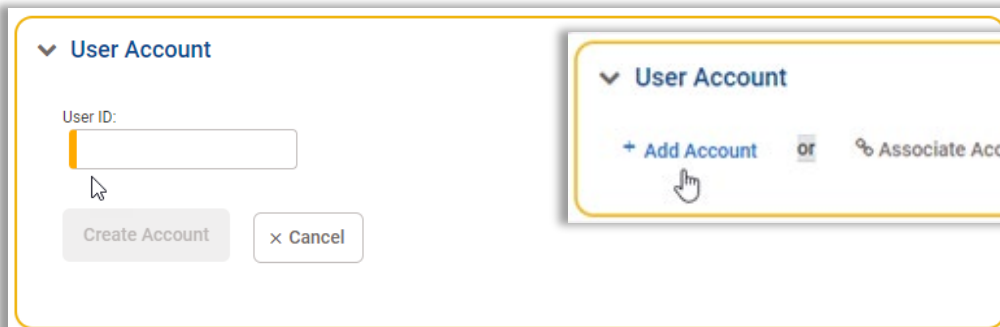


Email Address

pbreesly@theoffice.com

Primary

Save Cancel



▼ User Account

User ID:

Create Account Cancel

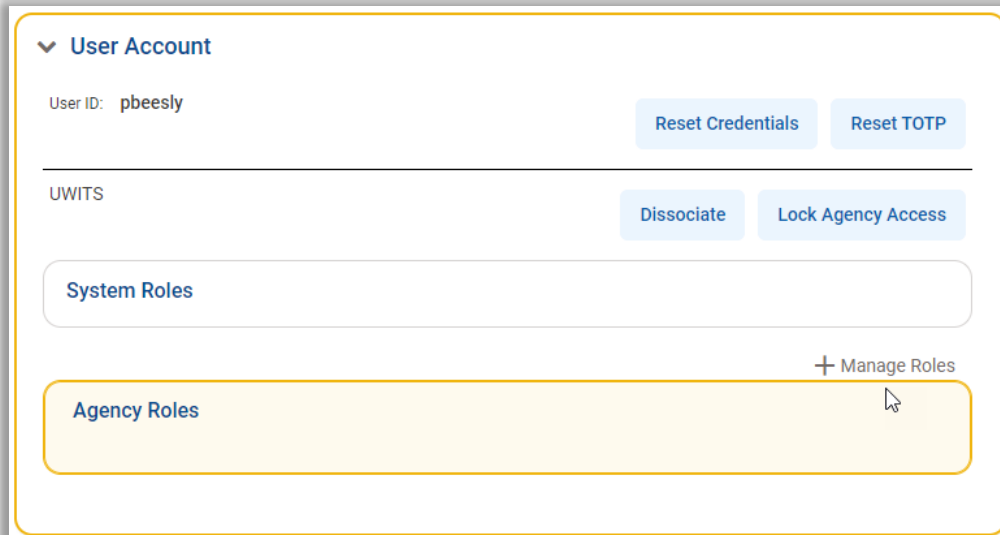
+ Add Account or Associate Account

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**.



▼ User Account

User ID: pbeesly

Reset Credentials Reset TOTP

UWITS

Dissociate Lock Agency Access

System Roles

Agency Roles

+ Manage Roles

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

Agency Roles

BEESLY, Pam

Available Roles Hide Inherited Roles Show description

Assigned Roles Show description

Search... | Search...

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

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

✓ I am done

Search for the various Agency Roles.

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

+ Manage Roles

Agency Roles

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

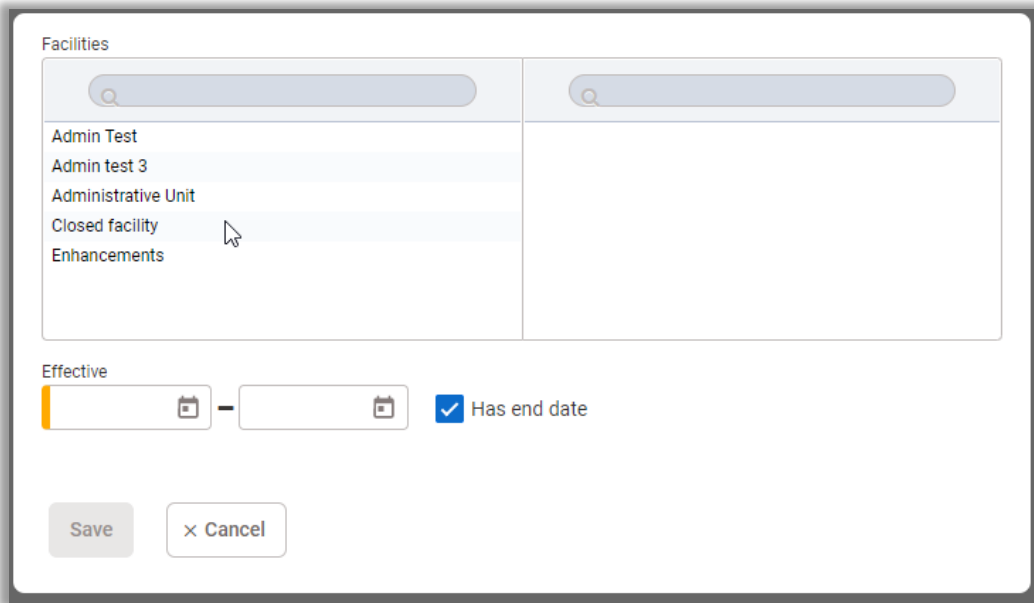
Facility Assignments

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.



The screenshot displays a user interface for facility assignments. At the top, there are two search bars. Below them is a list of facilities: "Admin Test", "Admin test 3", "Administrative Unit", "Closed facility", and "Enhancements". A mouse cursor is hovering over "Closed facility". To the right of this list is an empty box for the selected facility. Below the facility list is an "Effective" date field with two calendar icons and a minus sign between them. A checkbox labeled "Has end date" is checked. At the bottom, there are "Save" and "Cancel" buttons.

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**.

The screenshot shows a form for adding a professional qualification. It includes dropdown menus for 'Category' and 'Type', a text field for 'Issuer Name', a checkbox for 'Include in Display Name', a text field for 'Qualification Number', and date pickers for 'Effective' and 'End Date' with a 'Has end date' checkbox. A 'Note' field and 'Save'/'Cancel' buttons are at the bottom. A yellow callout box points to the 'Include in Display Name' checkbox.

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.

The screenshot shows the 'Details for Della Street' page. The 'License Information' section is highlighted. The 'License Type' is 'Licensed SUDC', which is circled in red. A blue arrow points from the 'Include in Display Name' checkbox in the form above to this 'Licensed SUDC' entry.

UTAH DIVISION OF PROFESSIONAL LICENSING LICENSEE LOOKUP & VERIFICATION SYSTEM	
Details for Della Street	
License Information	
Name:	Della Street
City, State, Zip, Country:	Salt Lake City UT 84114 United States
Profession:	Substance Use Disorder
License Type:	Licensed SUDC
License Number:	000000-0000
Obtained By:	Unknown
License Status:	Active
Original Issue Date:	01/01/1963
Expiration Date:	12/31/2027
Agency and Disciplinary Action*:	NO DISCIPLINARY ACTIONS WITHIN THE TIME PERIOD ESTABLISHED IN UTAH CODE 63G-4-106 AND 106-2-106
Docket and Citation Number(s):	N/A
E-Prescriber:	

The screenshot shows the 'Type' dropdown menu with options: Degree, Other, and MSMHC-I. The 'Other' option is selected.

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



Staff Members

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.

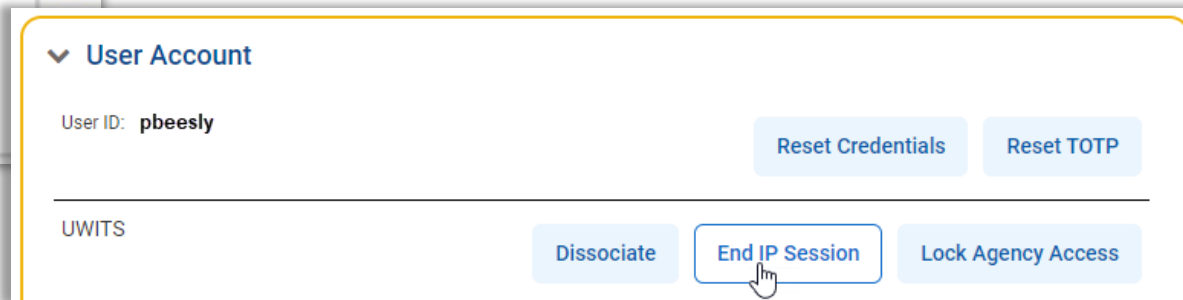
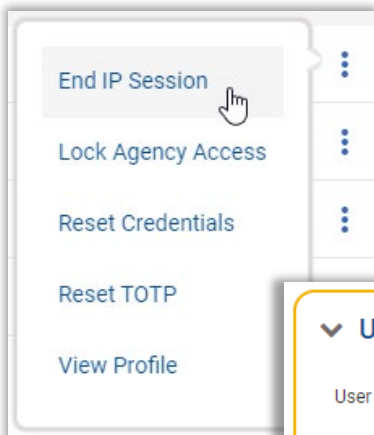
Search for the staff member, hover over the action button (⋮) then click on the **View Profile** option. The Staff Member Workspace will automatically open in edit mode. Scroll to the User Account panel and click on the **Enable** button. Next, click the ✓ **Done Editing** button. The staff member will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

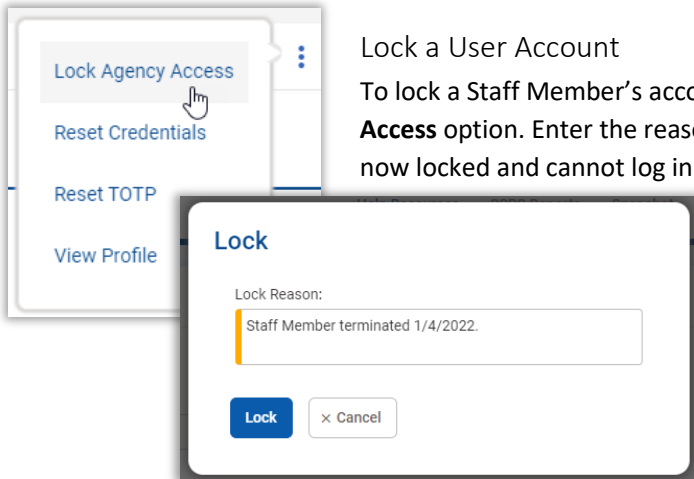
To clear an active session, search for the Staff Member at the **Staff Member Search** screen. Hover over the action button (⋮) then click on **End IP Session**. Alternatively, you may also click on the **View Profile** option, scroll to the **User Account** panel, click on the **End IP Session** button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

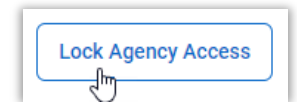
Note: If a user has not accessed their account since 1/1/2021, please create a new account for them rather than reactivating their previous account.



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.



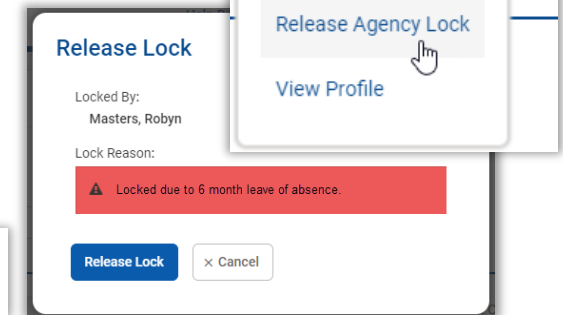
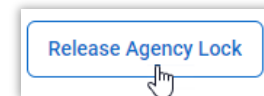
Important Note: User accounts can also be locked at the System level. To unlock an account at the System level, please email UWITS Support.

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.



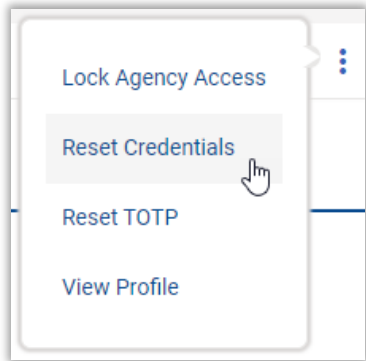
When a Staff Member Leaves

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

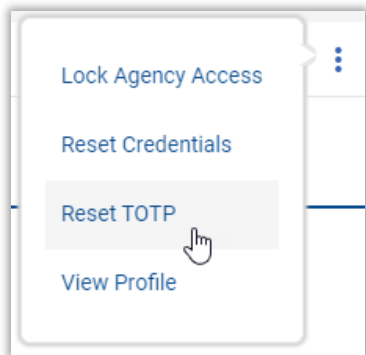
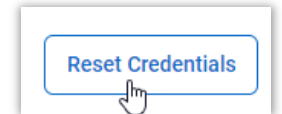
Staff members who have not logged in to UWITS for 60 days will now receive an email notification as a courtesy. If they do not log in at least once during the next 30 days then another email will be sent and their account will be locked.



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.

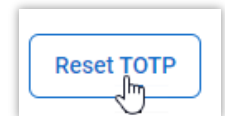
Alternatively, you may also click on the **View Profile** option, scroll to the **User Account** panel, click on the **Reset Credentials** button then click on the ✓ **Done Editing** button.

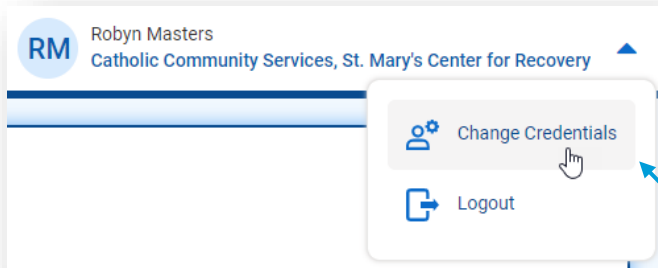


Reset TOTP (Multifactor Authentication)

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.

WITS Web Infrastructure for Treatment Services

Change Credentials

User ID: **rmasters**

Security Question
What breed is your dog? ▾

Answer
beagle

Show Password/PIN

Old Password
[Text Input]

New Password
[Text Input]

Confirm Password
[Text Input]

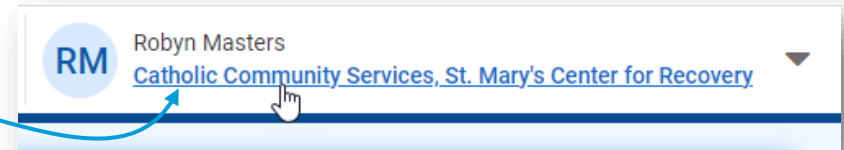
Change × Cancel

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

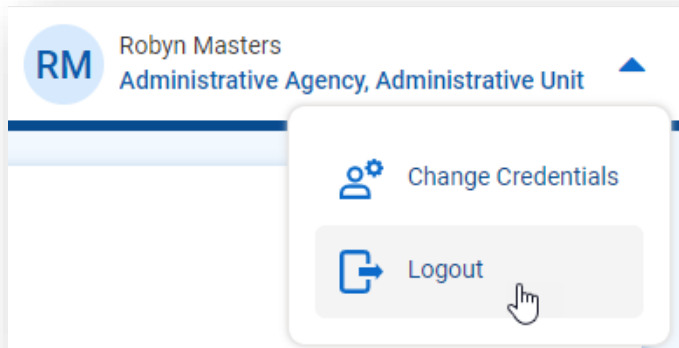
Context is the word used to describe your currently selected Agency plus Facility. This is shown at the top left corner of the UWITS screen, just under your name.

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.