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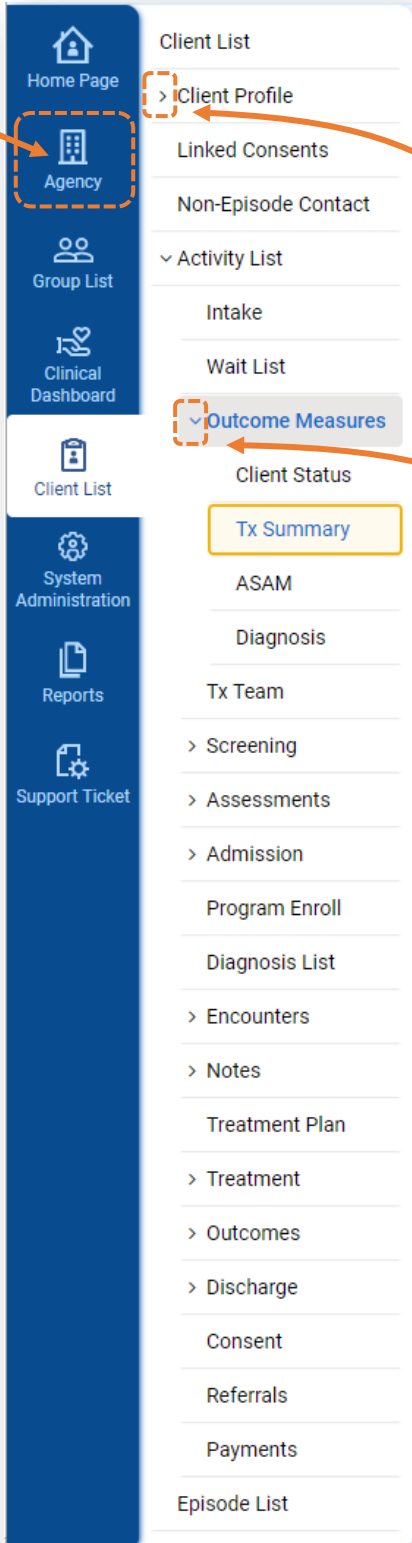
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# Menus

UWITS screens are connected to a menu. The UWITS Main Menu (also called the Navigation Pane) appears at the left of the screen. The menu has several levels. Each menu option allows the user to navigate to specific screens. Click on a menu item to select it.

Menu items at the first level include an icon plus a text label beneath. Which options appear will vary depend on the user's level of access.

Once a first level function has been selected, the menu expands to display the second level options.



If these second level menus are connected to a third level menu, that is shown by an arrow to the left of the menu option. When the second level menu is selected the menu will expand and the arrow will point down.

This is also true when third level options are connected to a fourth level menu.

# Home Page and Tool Bar

The UWITS Home Page shares notifications, announcements and schedules. Throughout UWITS, the Tool Bar offers information and many helpful options.

The UWITS environment and current version number will show to the left side. Production is not specifically labeled, but it will say "Training" or "UAT" when not Production.

Watch the center of the Tool Bar for the Generate Report, Document Management and Snapshot buttons and the action button (⋮). These are available on many screens throughout UWITS.

The **Generate Report** button creates a report showing the details of the current screen.

**Document Storage** is available on many screens throughout UWITS.

The **Snapshot** button opens a new window with a read-only copy of the current screen.

Hover over the **action button** (⋮) to show any available menu options.

If the user has added a photo then it will show here. If not then their initials will appear.

The current user's name and context (both agency name and facility name) show in the top right corner.

The screenshot shows the UWITS interface with the following components and annotations:

- Navigation Pane (Left):** A vertical menu with icons for Home Page, Agency, Group List, Clinical Dashboard, Client List, System Administration, and Reports. An annotation states: "The Navigation Pane can be used to navigate to different areas of the system."
- Header:** Displays "Hello, Andy" and the date "May 9". An annotation points to the "Hello, Andy" text: "Notices will appear on the user's Home page relative to permissions and access."
- Tool Bar:** Contains buttons for "Generate Report", "Documents (2)", "Snapshot", and an action button (⋮). An annotation points to the action button: "Hover over the action button (⋮) to show any available menu options."
- User Profile:** Shows the user's initials "AS" and name "Andy Sachs, Administrative Agency, Administrative Unit". An annotation points to the profile area: "If the user has added a photo then it will show here. If not then their initials will appear."
- Logout Menu:** A dropdown menu with "Change Credentials" and "Logout" options. An annotation points to the "Logout" button: "Logout should be used when exiting UWITS. Do not close the window."
- Announcements:** A section with a notice dated "7/21/2021 9:58 am" stating "THIS IS NOT A PRODUCTION SITE" with a "HIGH PRIORITY" tag. An annotation points to this section: "Announcements appear in the middle of the Home Page."
- Scheduler:** A section with a search bar and date pickers. An annotation points to the scheduler: "Schedule for user (or multiple users) depending on the user's assigned permissions."

# Client Header

The Client Headers identifies and shows helpful information about the client a user is working with.

Client photo (or initials) | Client name | Client preferred name | Client age

HC | CRUNCH, Horatio M. (Cap'n Crunch) | 21

H9C010101M  
UNIQUE CLIENT ID

1/1/2001  
DOB

Male  
SEX

Unique Client ID | Client Date of Birth

If Gender Identity is blank then this will show the client's sex at birth and be labeled Sex.  
If a Gender Identity has been selected then this space will show the client's Gender Identity and will be labeled Gender Identity.

RR | RUNNER, Road | 21

R9R010101M  
UNIQUE CLIENT ID

1/1/2001  
DOB

NON-BINARY  
GENDER IDENTITY

CRUNCH, Horatio M. (Cap'n Crunch) | UCN H9C010101M | 21 | Male

The Client Header collapses to a smaller version after scrolling down.

## Upload Profile Image (Optional)

If you like, you may add a photo of the client. It will appear in place of their initials in the client header. To do so, locate the **Upload Profile Image** box in the middle of the **Client Profile** screen. Click on the **Browse** button.

Select the correct photo then click on the **Open** button. Next, click on the **Upload** button.

Upload Profile Image

No File Selected... | Browse | Upload

Open

Pictures

Organize | New folder

OneDrive - Personal

Desktop | Documents | Downloads | Pictures | Music | Videos

Screenshots | Stuart Minion.jpg

File name: Stuart Minion.jpg | Image Files (\*.tif;\*.jif;\*.pjp;\*.api)

Open | Cancel

MINION, Stuart | 25

S9M010101M  
UNIQUE CLIENT ID

1/1/2001  
DOB

Male  
SEX

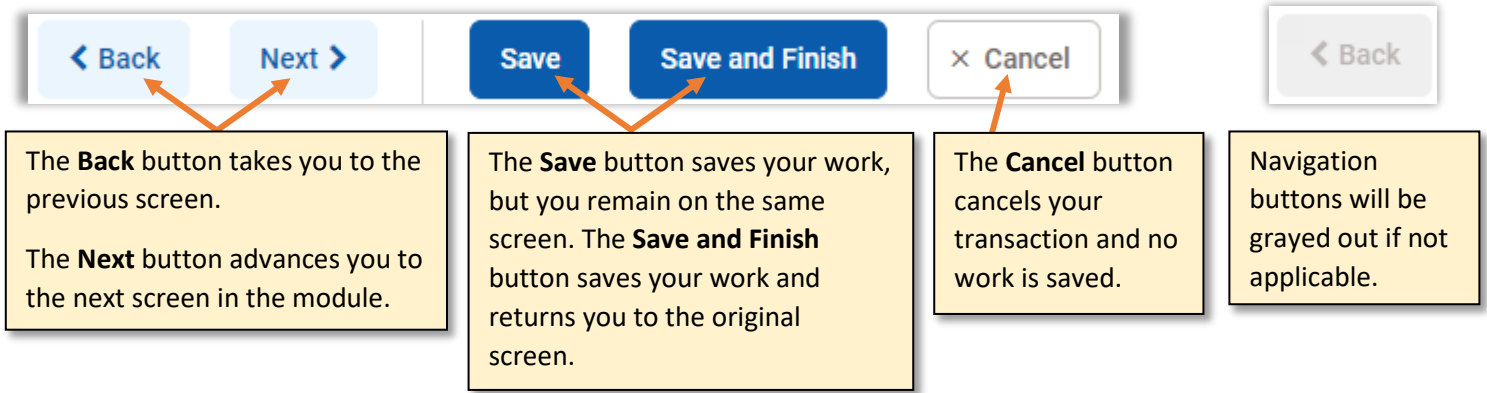
To remove the image, click on the **Remove Image** link.

Upload Profile Image

No File Selected... | Browse | Upload | Remove Image

## Navigation Buttons

These buttons allow the user to move through a particular UWITS module (such as the Client Admission).



The **Back** button takes you to the previous screen.

The **Next** button advances you to the next screen in the module.

The **Save** button saves your work, but you remain on the same screen. The **Save and Finish** button saves your work and returns you to the original screen.

The **Cancel** button cancels your transaction and no work is saved.

Navigation buttons will be grayed out if not applicable.

## Navigation Shortcuts

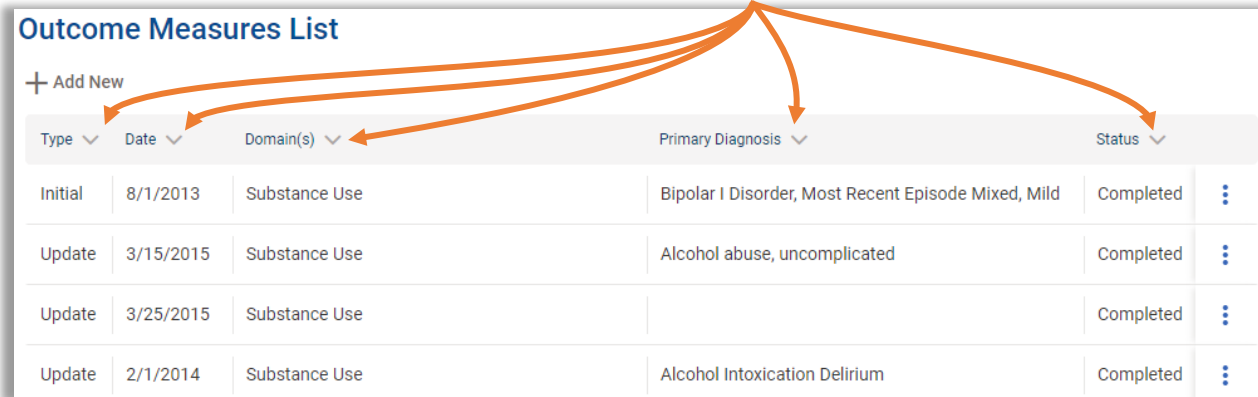
- Tab** key                      Moves the user from field to field
- Control (Ctrl)** key        Holding down the Control key while selecting multiple options in mover boxes allows the user to select and move more than one selection in a mover box.
- Shift** key                     Holding down the Shift key while selecting options in a mover box will allow the user to choose multiple sequential options.
- Helpful Hints**                Moving your mouse over a field will generate a helpful hint box providing additional information about the data field.

## Keyboard Shortcuts

Shortcut	Topic	Description of Keyboard Shortcut
Ctrl + Alt + H	Header	Sets focus on the first item in the main Header at the top of the screen.
Ctrl+ Alt+ M	Menu	Sets focus on the first item of the Menu Tree/Main Navigation (which is the “Skip to Menu Tree End” skip link).
Ctrl + Alt + S	Save	Sets focus on the Save button on screen (which is often located at the bottom of the screen).
Ctrl + Alt + C	Cancel	Sets focus on the Cancel button on screen (which is often located at the bottom of the screen).
Ctrl + Alt + F	Finish	Sets focus on the Finish button on screen (which is often located at the bottom of the screen).
Ctrl + Alt + B	Button (1st)	Set focus on the first enabled Button of the main form buttons on screen (often located at the bottom of the screen).
Escape	Escape	Jump out of the Menu Tree or any list.
Ctrl + Alt + T	Tree	Collapse or expand the menu tree.
Ctrl + Alt + R	Refocus	Maximize or minimize main content.

## Tables

On a screen with a table, click on the label at the top of any column to sort the table by that column in ascending order. Click again to sort descending. Click again to remove the sort.

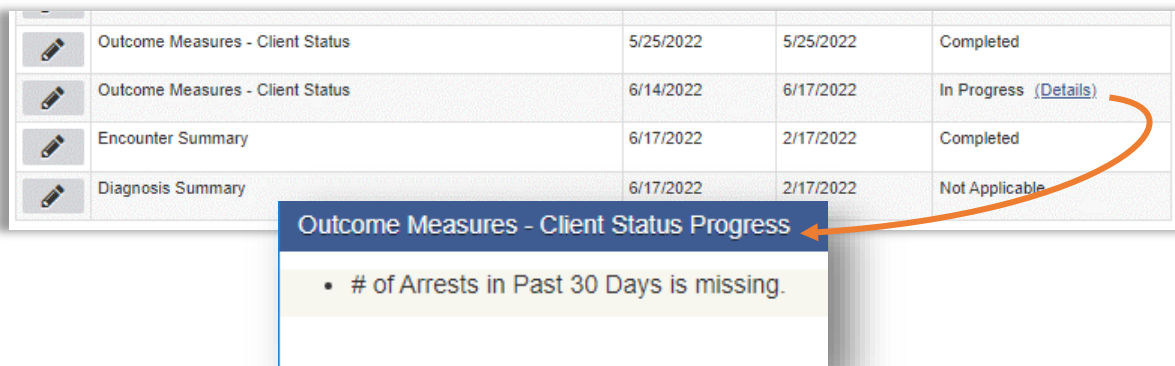


The screenshot shows a table titled "Outcome Measures List" with a header row containing dropdown menus for "Type", "Date", "Domain(s)", "Primary Diagnosis", and "Status". Orange arrows point from a central point above the table to each of these headers, indicating the sorting mechanism.

Type	Date	Domain(s)	Primary Diagnosis	Status	
Initial	8/1/2013	Substance Use	Bipolar I Disorder, Most Recent Episode Mixed, Mild	Completed	⋮
Update	3/15/2015	Substance Use	Alcohol abuse, uncomplicated	Completed	⋮
Update	3/25/2015	Substance Use		Completed	⋮
Update	2/1/2014	Substance Use	Alcohol Intoxication Delirium	Completed	⋮

## In Progress Activities

Incomplete activities show as **In Progress** in the **Activity List**. Address each of the items listed then recheck the **Activity List** to ensure that it has been completed.



The screenshot shows a table with four rows. The second row is marked as "In Progress" and has a "(Details)" link. An orange arrow points from this link to a modal window titled "Outcome Measures - Client Status Progress". The modal window contains a list item: "# of Arrests in Past 30 Days is missing."

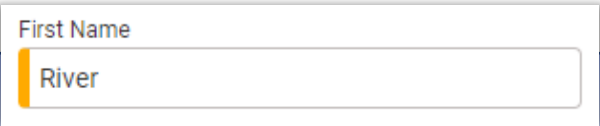
	Outcome Measures - Client Status	5/25/2022	5/25/2022	Completed
	Outcome Measures - Client Status	6/14/2022	6/17/2022	In Progress <a href="#">(Details)</a>
	Encounter Summary	6/17/2022	2/17/2022	Completed
	Diagnosis Summary	6/17/2022	2/17/2022	Not Applicable

**Outcome Measures - Client Status Progress**

- # of Arrests in Past 30 Days is missing.

# Understanding Fields in UWITS

When data is required to save, a yellow bar will be drawn at the left side of the field.



Billable

Yes  No

Living Arrangement

2-Private Residence - Independent

When data is required for completion, a striped, yellow bar will be drawn at the left side of the field. Incomplete data will not be submitted to the State through the monthly process.

When data is not required, no bar will be drawn at the left side of the field.

Middle Name

S

Ethnicity

Not Hispanic or Latino

When the cursor is currently in a field, the field will be drawn in blue, including the bar to the left, if any.

Fields drawn in red indicate a validation error. A short description of the error will also be indicated nearby.

First Name

\*Required to Save

When a field is grayed out it indicates that editing of that field is not allowed.

Signed By: Westergard, Cory, BA; Administrator

Signed On: 2/16/2016 12:51 PM

Admission Type

Initial Admission

Initial Admission

Transfer/Change in Service

A drop down box is used where only one entry may be selected from a list of values.

Available Staff

Priestly, Miranda

Selected Staff

Charlton, Emily  
Sachs, Andy



A mover box is used where more than one entry may be selected from a list of values. Some boxes may scroll.

Scrolling textboxes have gray bars drawn at the right side of the box. Drag the scroll bar down to view the text not shown on the screen.

Some scrolling textboxes also have gray bars drawn along the bottom of the box. Drag the scroll bar to the right to view the text not shown on the screen.

Follow-up Details

Scrolling textboxes are used to capture notes and descriptions. An example of a scrolling box, this field will accept at least 500 characters. Some scrolling text boxes have no character limits. An example of a scrolling textbox is a Comment field. There are many more examples throughout

Date fields include an icon to the right of the field. Click on the icon to select a date using the mouse.

Admission Date  
5/9/2022

Admission Date  
5/9/2022

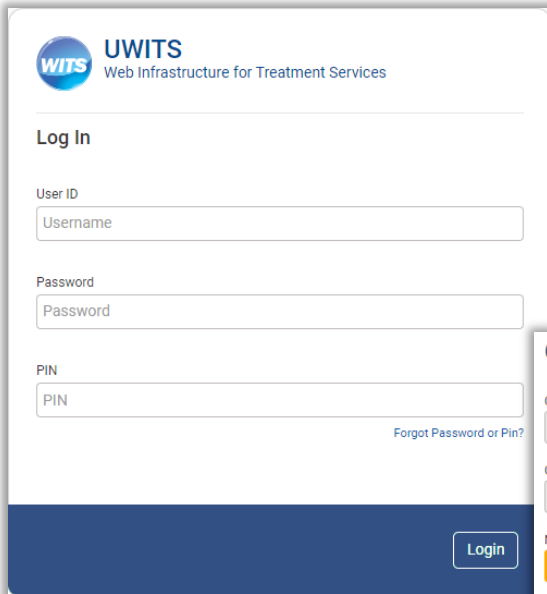
S	M	T	W	T	F	S
May 2022 >						
1	2	3	4	5	6	7
8	9	10	11	12	13	14
15	16	17	18	19	20	21
22	23	24	25	26	27	28
29	30	31				
Jun 2022 >			1	2	3	4

## Changing a Password

There are two methods for changing a password.

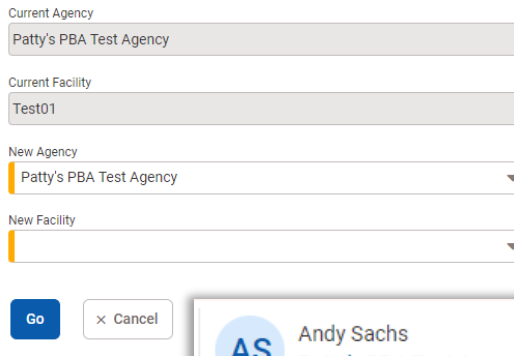
### Method 1. Password Both Known and Not Expired

If the password is known and has not yet expired then start by logging in to UWITS.



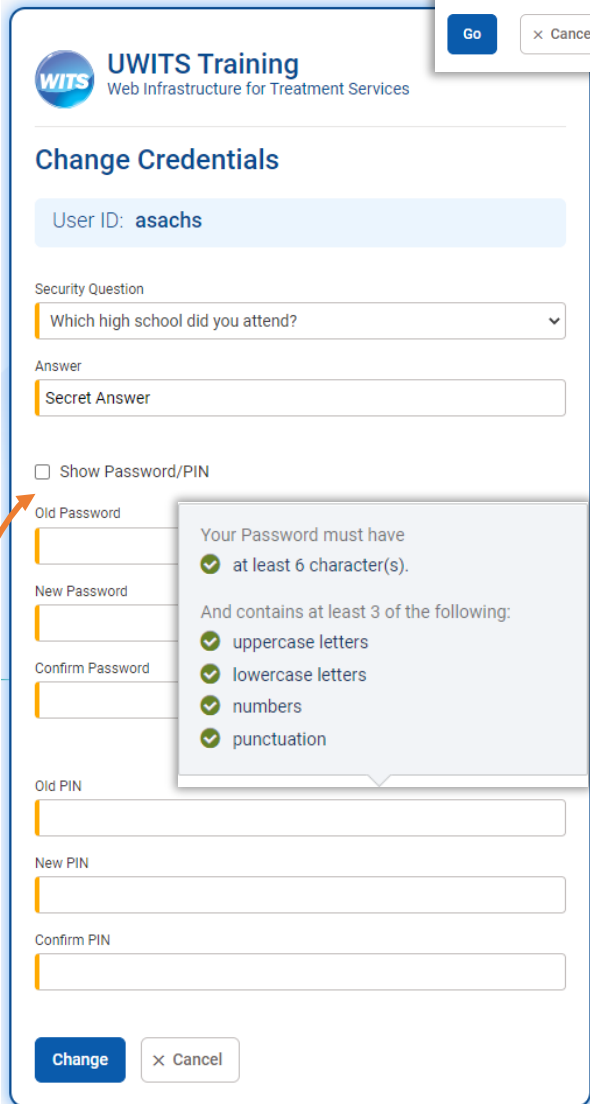
The image shows the 'Log In' page of the UWITS system. At the top left is the UWITS logo and the text 'Web Infrastructure for Treatment Services'. Below this is a 'Log In' section with three input fields: 'User ID' (with 'Username' as a placeholder), 'Password', and 'PIN'. A 'Forgot Password or Pin?' link is located below the Password field. At the bottom right of the form is a blue 'Login' button.

### Change Facility

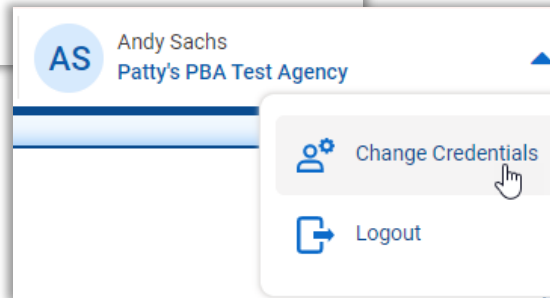


The image shows the 'Change Facility' form. It has four dropdown menus: 'Current Agency' (selected: Patty's PBA Test Agency), 'Current Facility' (selected: Test01), 'New Agency' (selected: Patty's PBA Test Agency), and 'New Facility'. At the bottom are two buttons: a blue 'Go' button and a white 'Cancel' button with a close icon.

Select a **Facility** then click on **Go**.



The image shows the 'Change Credentials' form in the UWITS Training system. At the top left is the UWITS Training logo and 'Web Infrastructure for Treatment Services'. The page title is 'Change Credentials'. Below this is a 'User ID: asachs' field. There is a 'Security Question' dropdown menu (selected: 'Which high school did you attend?') and an 'Answer' text field (containing 'Secret Answer'). A checkbox labeled 'Show Password/PIN' is present. Below are fields for 'Old Password', 'New Password', and 'Confirm Password'. A password requirements tooltip is visible, stating: 'Your Password must have at least 6 character(s). And contains at least 3 of the following: uppercase letters, lowercase letters, numbers, punctuation'. At the bottom are fields for 'Old PIN', 'New PIN', and 'Confirm PIN'. At the bottom right are two buttons: a blue 'Change' button and a white 'Cancel' button with a close icon.



The image shows a user profile menu. At the top is the user's initials 'AS' and name 'Andy Sachs' with the agency 'Patty's PBA Test Agency'. Below this is a dropdown menu with two options: 'Change Credentials' (with a gear icon) and 'Logout' (with a door icon). A mouse cursor is pointing at the 'Change Credentials' option.

Select **Change Credentials** from the left menu.

Select a **Security Question** and enter an **Answer**.

Enter a **Password** and then enter it again to confirm that it has been typed correctly. A box with password requirements will appear to guide your password selection.

You may click on the checkbox by **Show Password/PIN** to show the password as you type it.

## Method 2. Forgotten or Expired Password

If the password is not known or has expired then start by clicking on the **Forgot Password or Pin?** link at the **Log In** screen.

WITS UWITS  
Web Infrastructure for Treatment Services

### Log In

User ID  
Username

Password  
Password

PIN  
PIN

[Forgot Password or Pin?](#)

Login

At the next screen, labeled **Reset your password by email**, enter your **Username**. Take care to enter your username and not your email address.

WITS UWITS Training  
Web Infrastructure for Treatment Services

### Reset your password by email

Username  
asachs

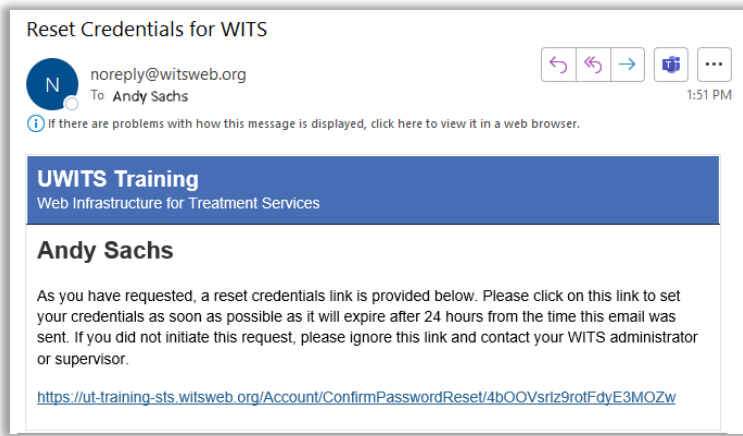
Submit

**Note:** If you have not yet setup your Security Question and Answer then you will receive an error message to that effect. If so, please contact your Agency Navigator for assistance.

WITS UWITS Training  
Web Infrastructure for Treatment Services

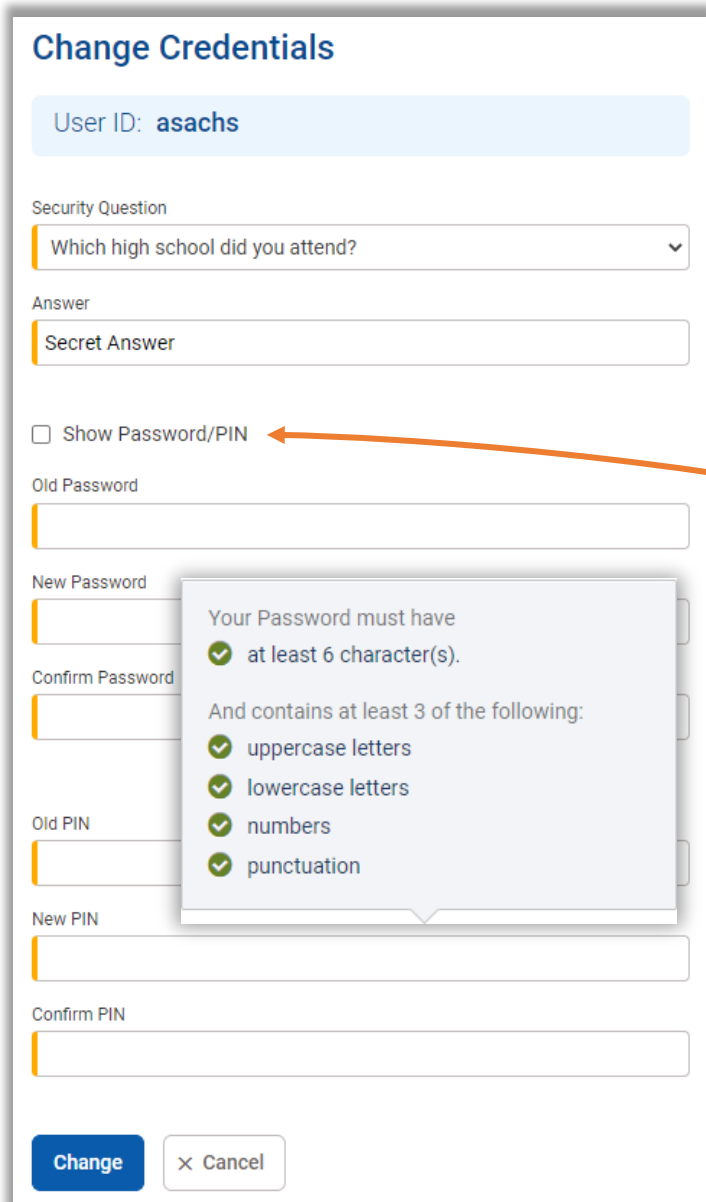
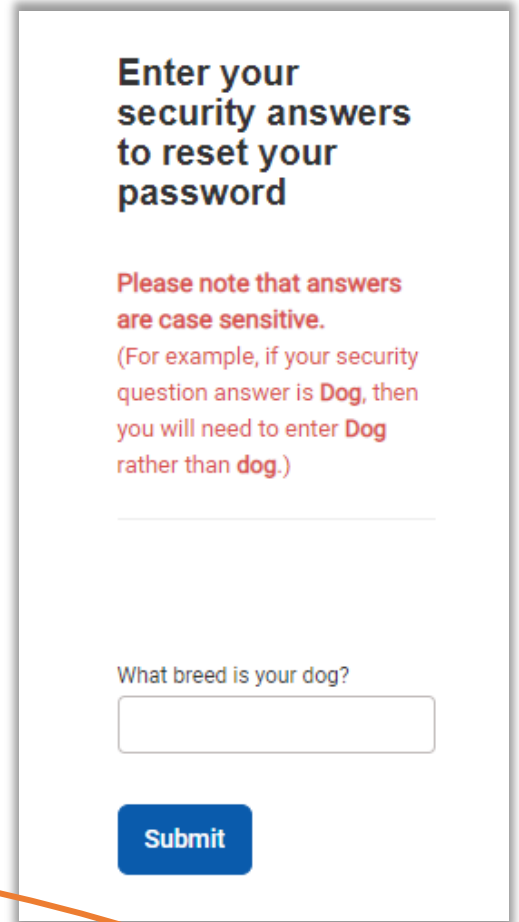
### asachs

You have not set your Security Question/Answer and cannot proceed with your request.  
Please contact your UWITS Training administrator or supervisor.



Check your email for an email with a link to reset your credentials.

Click the link then enter the **Answer** to the **Security Question** then click on the **Submit** button.



At the next screen, enter a **Password** and then enter it again to confirm that it has been typed correctly. A box with password requirements will appear to guide your password selection.

You may click on the checkbox by **Show Password/PIN** to show the password as you type it.

## UWITS Multifactor Authentication

In addition to asking for a password, UWITS requires **TOTP**, a time-based, one-time password.

To login successfully, you will need a TOTP app.

Please see your Navigator for assistance in selecting a TOTP Authenticator app. If your agency does not have a preferred app, you may search for "TOTP authenticator" in your cell phone's app store or in a web browser.

Select and install an authenticator then proceed to the next step.

**Note:** So many TOTP authenticator apps are available that you can be selective. Check out the privacy policy and remember that you never need to pay a fee.

Click on the **Forgot Password or Pin?** link.

Enter your username and click on the **Submit** button.

Then answer the security question and click **Submit**.

Now check your email.

Click on the link in the email to reset your credentials.

Update your password then click save.

Reset Credentials

Display Name  
User, Test 1

Email  
rmasters@slco.org

Security Question  
What breed is your dog?

Answer  
Parakeet

Password  
\*\*\*\*\*

Confirm Password  
\*\*\*\*\*

Save Cancel

Show Password/Pin

Now check your email again.

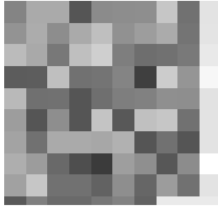
Click on the link to setup Multifactor Authentication.

Use the QR Code (or the text code) on the next screen to setup your TOTP Authenticator app.

Then enter the six-digit code from your TOTP Authenticator app and click on the Submit button.

**UWITS Training - Setup TOTP Authentication**

Scan the barcode with the two-factor authentication app on your phone.



If you can't scan a barcode, enter the following text code instead on the two-factor authentication app on your phone.

QWERTYUIOP123ASDFGHJKL456ZXCVBNM789QWERTYUIOP012ASDF

Then the app will display a six-digit code to enter below.

Six-digit code is required

Submit

When your TOTP Authenticator app has been setup successfully, the UWITS screen will announce your success.

You may now login to UWITS using your chosen TOTP app.

**Success**

You can now log in to WITS.