

Staff Management



Where: Agency > Staff Members

Staff Management involves creating and managing staff member accounts within the system. This includes setting up new employees and assigning the correct system permissions through role assignments; troubleshooting login issues such as resetting passwords; and revoking system access when an individuals' employment ends.

From the Staff Member Search screen, you can use the search bar to find existing staff members by searching for their first name, last name, email address or User ID (the User ID is displayed in the column titled, "Identifier").

	First Name	Last Name	Agency	Status	Email	Identifier	Start Date	Termination Date
	Ron	Swanson	Administrative Agency	Active	ron.swanson@pawnee.in.gov	RSwanson177	10/01/2013	09/25/2018
	Admin	User	Administrative Agency	Active	noreply@feisystems.com	admin	01/01/2009	
	Bobby	Mantoni	Administrative Agency	Locked	bmantoni@feinfo.com	bmantoni	04/16/1987	01/08/2010
	Chris	White	Administrative Agency	Active	cwhite@feinfo.com	cwhite	04/16/2009	
	Gagan	Singh	Administrative Agency	Active	gsingh@feinfo.com	gsingh	10/02/2075	04/09/2085

Figure Error! No text of specified style in document.-1: Staff Member Search/List screen

Table View

	First Name	Last Name	Status	Email	Identifier	Start Date	Termination Date
	Ash	Jones	Active	ashley.jones@feisystems.com	standard.admin	01/01/2017	

Panel View

Showing 1-1 of 1

Previous 1 Next

Select Columns



Select View



Ash Jones

Lock Agency Access

Reset Credentials

View Profile

Active

ashley.jones@feisystems.com

standard.admin

Sun Jan 01 2017 00:00:00 GMT-0500 (Eastern Standard Time)

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How to Set Up a New Staff Member Account



Where: Agency > Staff Members

Follow the steps below to create a new staff account.

Note: Make sure you are in the correct agency location prior to creating a staff account.

1. On the left menu, click **Agency**, and then click **Staff Members**.
2. Click **Create New Staff Member**.

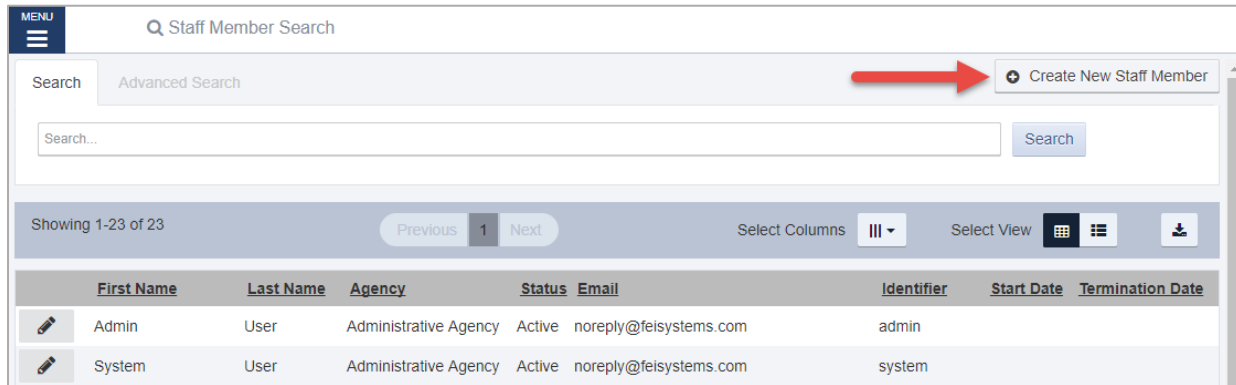


Figure **Error! No text of specified style in document.**-2: Staff Member screen

3. On the **Create New Staff Member** screen, complete at least the required fields. Required fields are indicated by a red bar to the right of the field.

Table **Error! No text of specified style in document.**-1: Create New Staff Member fields

Field	Description
Prefix	Optional field.
First	Type the staff member's first name.
Preferred	Optional field. Type the staff member's preferred first name.
Middle	Optional field.
Last	Type the staff member's last name.
Suffix	Optional field.
Gender	Select the staff member's gender from the drop-down list.

The screenshot shows a web application interface for 'PA-WITS Training'. A modal window titled 'Create New Staff Member' is open. The form contains the following fields:

- Prefix: (empty text box)
- First: (text box containing 'Clinical')
- Preferred: (empty text box)
- Middle: (empty text box)
- Last: (text box containing 'Staff')
- Suffix: (empty text box)
- Gender: (dropdown menu showing 'Not Collected')

At the bottom of the modal, there are two buttons: 'Create' and 'Cancel'.

Figure Error! No text of specified style in document.-3: Create New Staff Member screen

4. Click **Create**. The system will redirect to the Staff Member Workspace screen.

Note: The Create button will only appear when all of the required fields have been completed.

Completion Requirements

On the Staff Member Workspace screen, note the Completion Requirements located on the right side. The completion requirements can be entered in any order.



Figure Error! No text of specified style in document.-4: Completion Requirements

Add Email Address

1. On the Staff Member Workspace screen, point to the **Completion Requirements**.
2. Click **Add Email Address**. This will open the Contact Information panel.

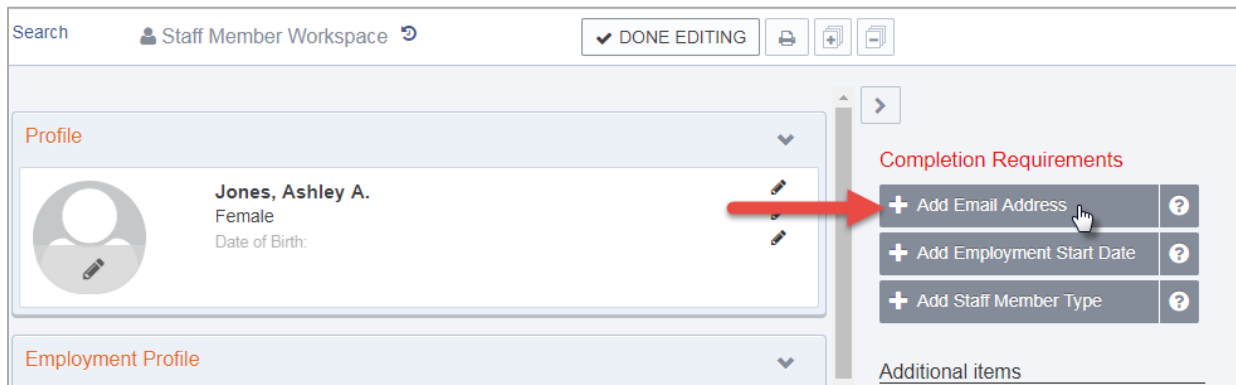
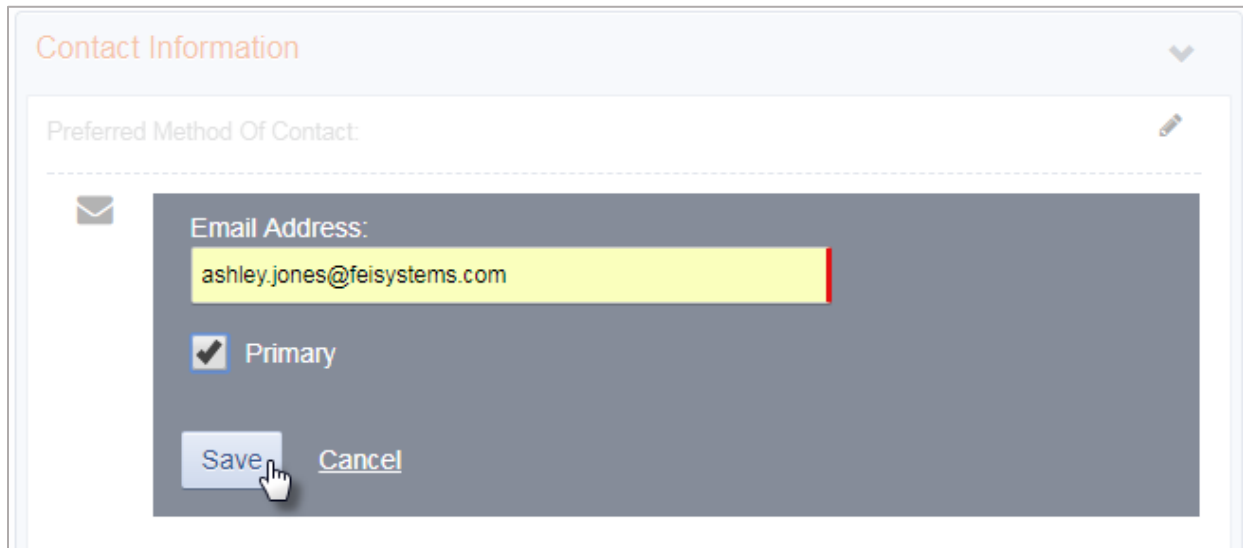


Figure Error! No text of specified style in document.-5: Completion Requirements, Add Employee Start Date

3. On the **Contact Information** panel, type the staff member's email address, check the Primary box and then click **Save**.



The screenshot shows a 'Contact Information' panel with a 'Preferred Method Of Contact' section. An email address 'ashley.jones@feisystems.com' is entered in a text field. Below the text field, the 'Primary' checkbox is checked. At the bottom of the panel, there are 'Save' and 'Cancel' buttons. A mouse cursor is pointing at the 'Save' button.

Figure **Error! No text of specified style in document.**-6: Contact Information panel, add primary email address

i **Note:** Staff members can have more than one email address associated with their account, however at least one email address must be marked as "Primary". The Primary email address will receive email notifications for the user to access their account.

Add Employment Start Date

1. On the Staff Member Workspace screen, point to the **Completion Requirements** and then click **Add Employment Start Date**. This will open the Employment Profile panel.

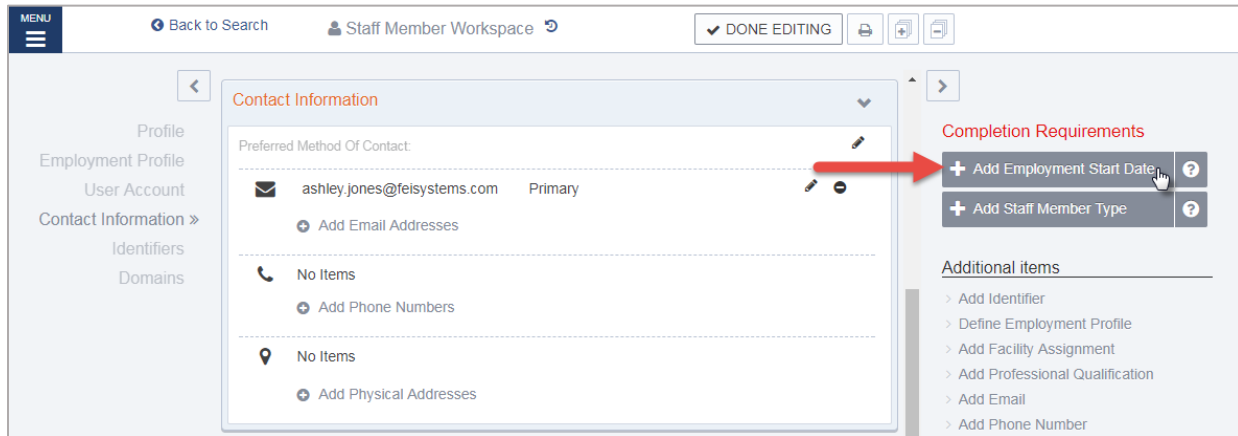


Figure **Error! No text of specified style in document.-7:** Add Employment Start Date

2. On the Employment Panel, in the **Employment Date Range** field, enter the employee's start date or use the calendar to select the start date. Stay on the Employment Panel.

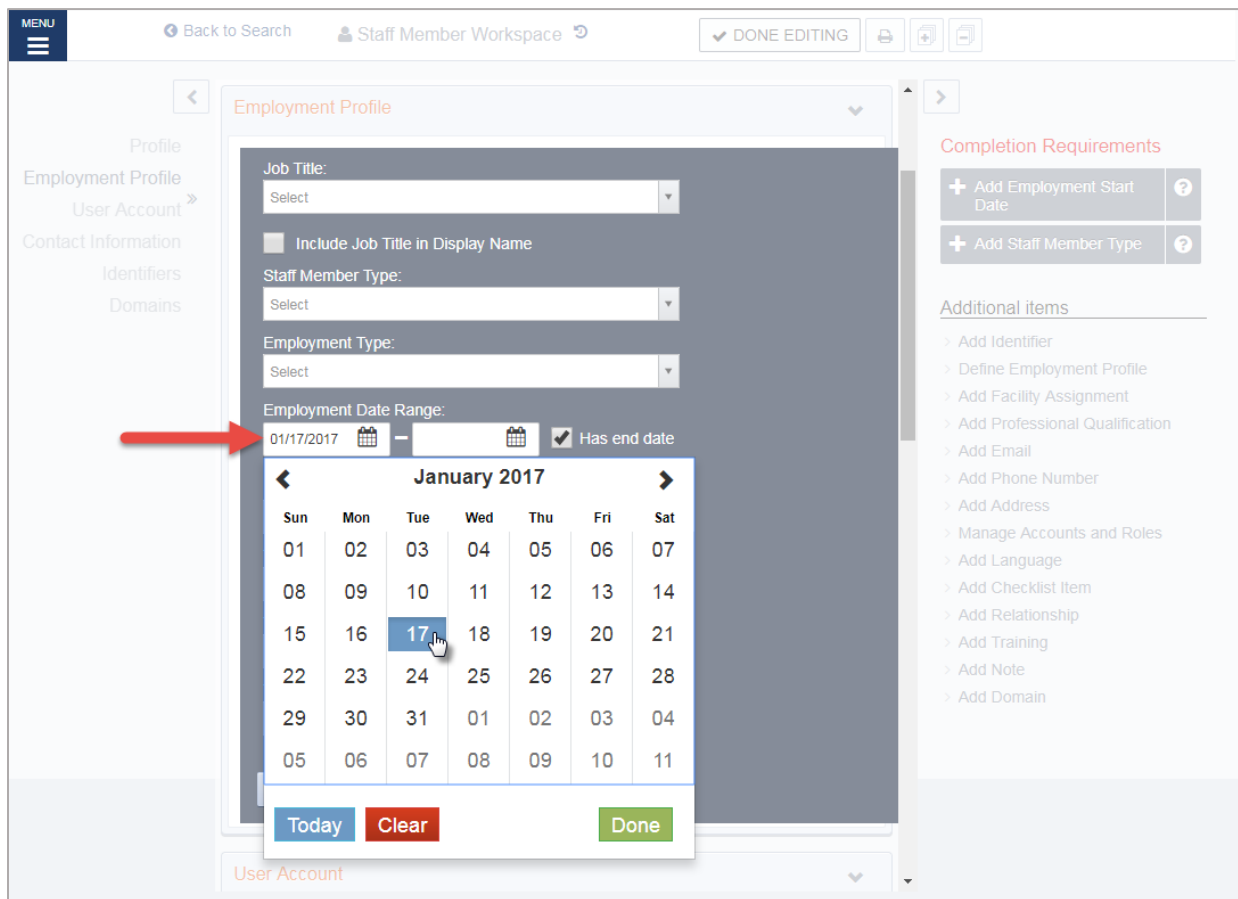
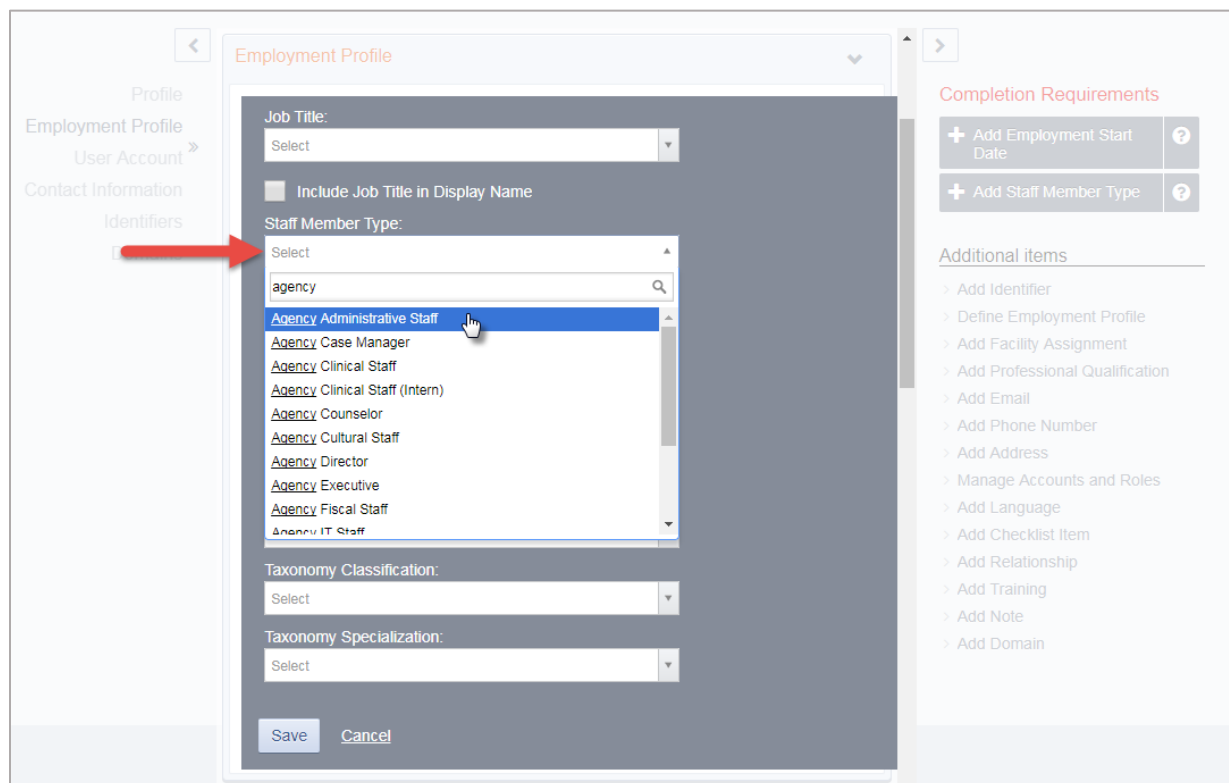


Figure **Error! No text of specified style in document.-8:** Employment Profile panel, Employment date range

Add Staff Member Type

3. On the Employment Profile panel, in the **Staff Member Type** field, select an option from the drop-down list or search for a value.



The screenshot shows the 'Employment Profile' panel in a software interface. On the left, a navigation menu includes 'Profile', 'Employment Profile', 'User Account', 'Contact Information', and 'Identifiers'. The main panel is titled 'Employment Profile' and contains several fields: 'Job Title' (a dropdown menu), a checkbox for 'Include Job Title in Display Name', 'Staff Member Type' (a dropdown menu with a search icon), 'Taxonomy Classification' (a dropdown menu), and 'Taxonomy Specialization' (a dropdown menu). The 'Staff Member Type' dropdown is open, showing a list of options including 'Agency Administrative Staff', 'Agency Case Manager', 'Agency Clinical Staff', 'Agency Clinical Staff (Intern)', 'Agency Counselor', 'Agency Cultural Staff', 'Agency Director', 'Agency Executive', 'Agency Fiscal Staff', and 'Agency IT Staff'. A red arrow points to the 'Staff Member Type' field, and a mouse cursor is hovering over 'Agency Administrative Staff'. At the bottom of the panel are 'Save' and 'Cancel' buttons. On the right side of the panel, there are sections for 'Completion Requirements' (with buttons for '+ Add Employment Start Date' and '+ Add Staff Member Type') and 'Additional items' (with a list of expandable options like 'Add Identifier', 'Define Employment Profile', etc.).

Figure **Error! No text of specified style in document.-9**: Employment Profile panel, Staff Member Type field

4. On the Employment Profile panel, click **Save**.

i **Note:** On the Employment Profile panel, certain options in the Staff Member Type field control additional features within WITS.

Add Facility Assignment

The Facility Assignments section allows you to assign one or more facilities for the staff member.

1. Point to the Additional items section, and then click **Add Facility Assignment**.

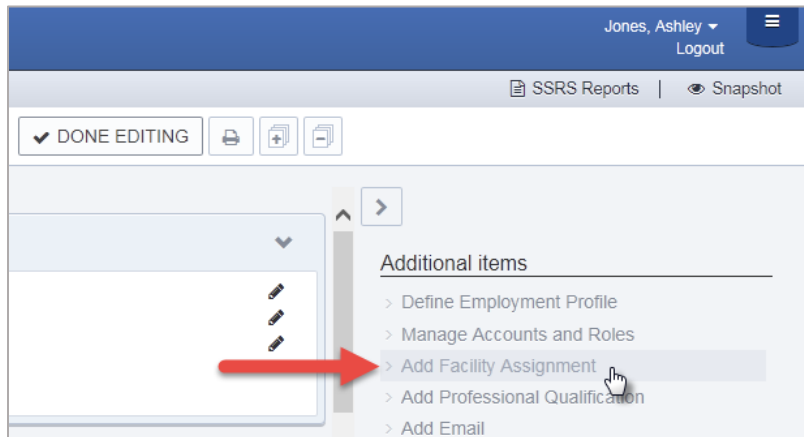


Figure Error! No text of specified style in document.-10: Additional Items section, Add Facility Assignment

2. In the Facility Assignments section, click on the applicable facilities.
3. Select the **Effective Date**.

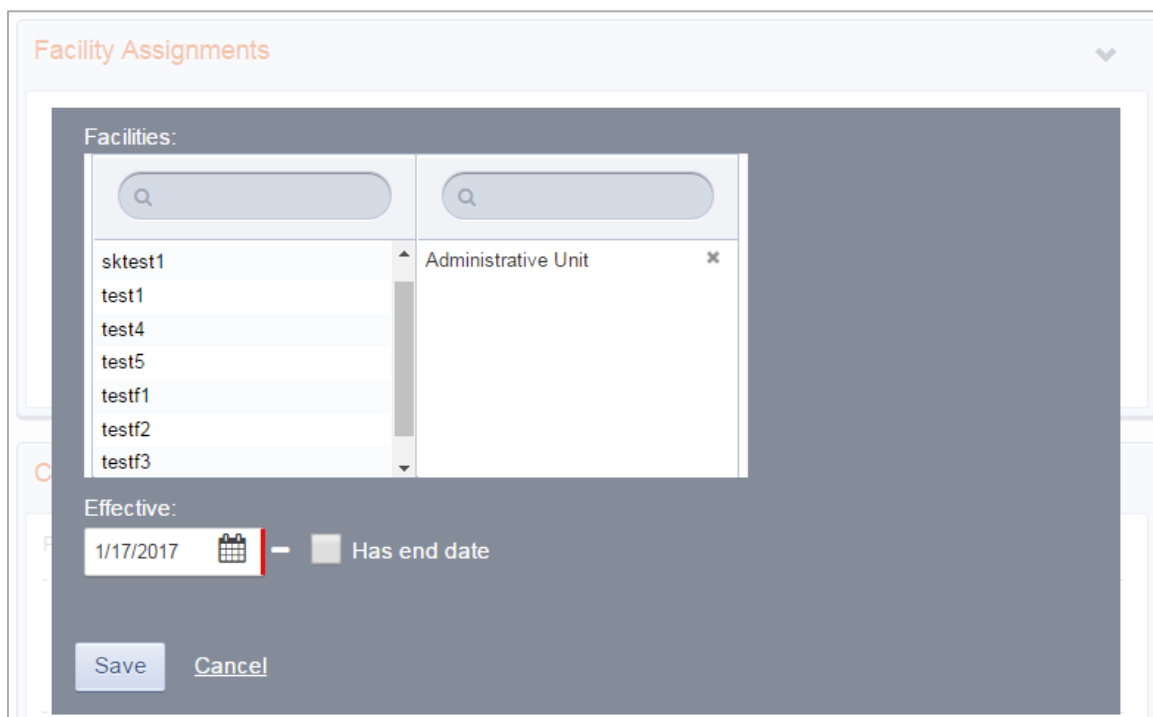


Figure Error! No text of specified style in document.-11: Facility Assignments panel

4. Click **Save**.

Add User Account

Once items in the Completed Requirements sections have been met for a Staff Member, a user account can be created for the staff member. The user account will allow the staff member to log into WITS and perform various functions based on the roles granted to their user account.

1. In the **User Account** panel, click **Add Account**.

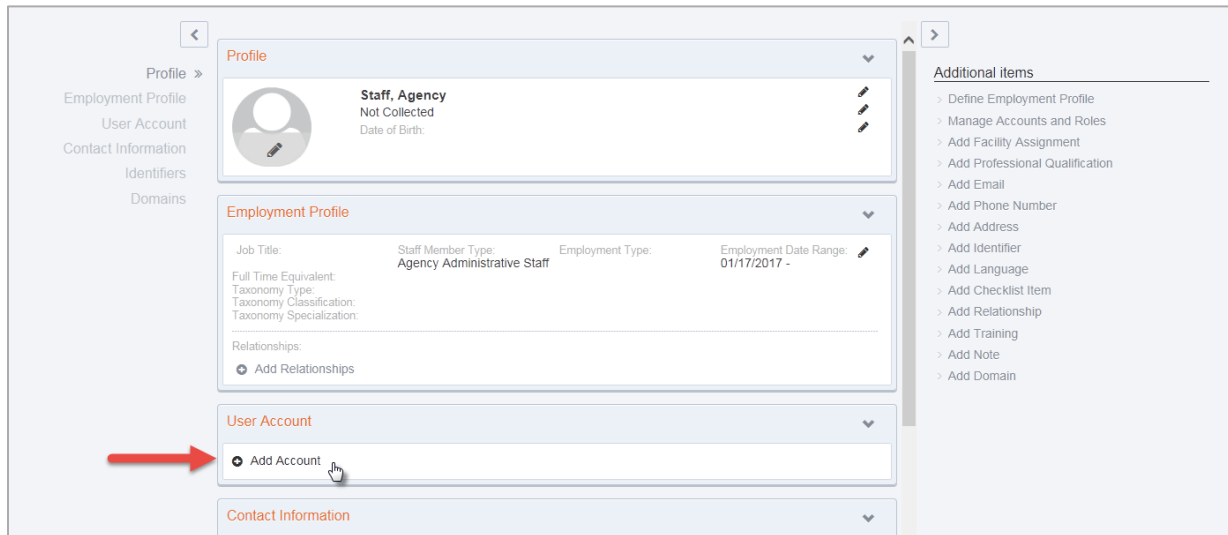


Figure **Error! No text of specified style in document.**-12: User Account panel, Add Account

2. In the **User ID** field, type the staff member's login name.

! **Important:** The User ID must be unique for each staff member. Once an account is created, the User ID cannot be changed.

3. In the **Email Address** field, type the staff member's email address.

! **Important:** WITS will send important login information using the email address provided in this section.

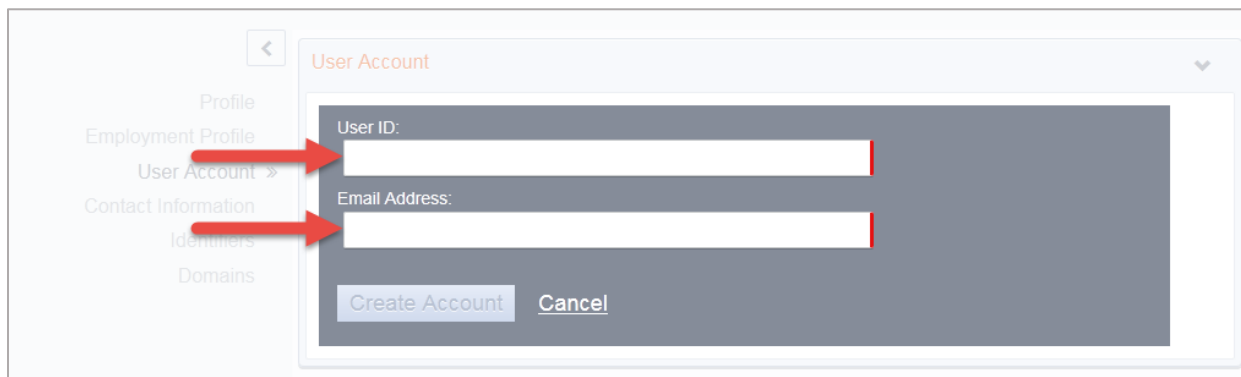


Figure **Error! No text of specified style in document.**-13: User Account panel, required fields

4. Click **Create Account**.

User Roles

After creating the User ID, roles can be granted to the staff member. When adding roles, it's important to consider the type of data the individual staff member will be entering and what type of information the individual needs access to within WITS.

Table **Error! No text of specified style in document.**-2: Role Table

Job Function	System-Level Roles (Assigned under System Administration > System Accounts)	Agency-Level Roles (Assigned under Agency > Staff Member)
WITS Administrators (DCF Only)	WITS Administrator	CONTINUUM Triage Access
	SSRS Administrator	CONTINUUM™ Assessment Clinician
DCF Staff (Non-Administrators)	Access All Agencies	
	Clinical (Full Access)	
	Staff Administrator	
	Agency Administrator	
	Facility Administrator	
	SSRS Cross Agency User	
Managing Entity Users	Access all oversight agencies in read-write mode	Clinical (Full Access)
	Agency Administrator	
	Facility Administrator	
	Staff Administrator	
	View Consented Clients	
Provider Agency Users		Grant Data Entry (Full Access)
		CONTINUUM™ Assessment Clinician
		SSRS Agency Reader
		Overdose Reversal Kits Management (Full Access)
		Staff Administrator <i>Note – this should only be provided to users responsible for support/agency administration.</i>


Assign User Roles

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


User Account ▼

User ID: **staffadmin** Enable End IP Session Lock Agency Access
Reset Credentials Release Agency Lock

System Roles:

Agency Roles ➕ Manage roles 

Contact Information ▼

Preferred Method Of Contact: 




 ashley.jones@feisystems.com Primary  

Figure Error! No text of specified style in document.-14: User Account panel, Manage Roles link

Manage Roles Screen: User Interface

There are two panels on the Manage Roles screen. The left panel displays a list of Available Roles, while the right panel displays a list of Assigned Roles. See Figure Error! No text of specified style in document.-15 for additional information about features displayed on the Manage Roles screen.

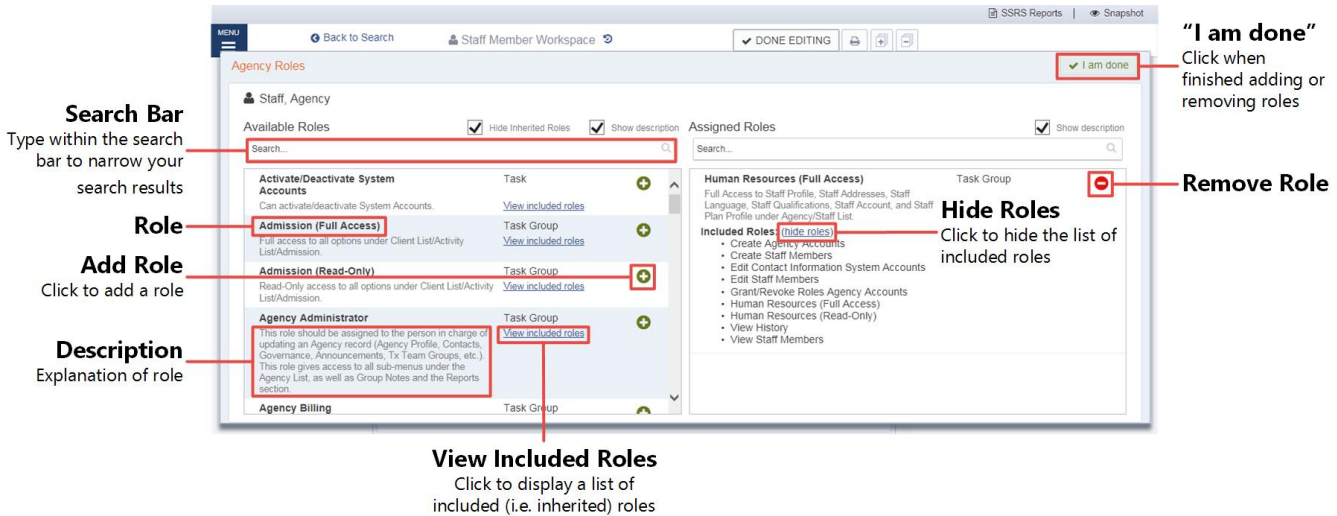
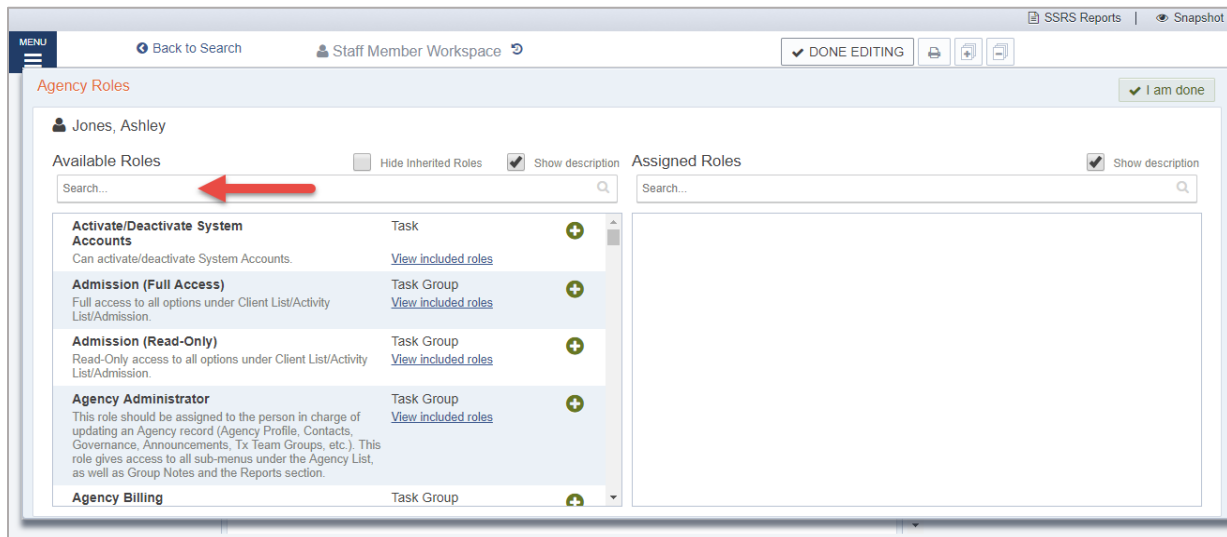


Figure Error! No text of specified style in document.-15: Manage Roles Screen

- Use the **Search** bar to type the name of a role, or scroll through the list to find the correct role(s).



- To add a role, click the green plus sign. To remove a role, click the red minus sign.
- When finished assigning roles, click **I am done**.

Adding additional items to a profile

The remaining items under the Additional items section allow the user to customize the staff member's profile with relevant data.

Account Rules/Other Functionality

- **End Date:** Importance of End date – This field drives a few things on screen; when someone has an end date, they will no longer appear in certain drop down boxes throughout the system.
- **Display Credentials:** When the "Include in Display Name" box is checked, the staff member's credentials will be displayed when they sign a note. This box can be found on different panels in the staff member profile.
- **Professional Qualifications:** In the Professional Qualifications panel, the staff member's licenses, degrees, and certificate information can be recorded. This information can also be included in the staff member's display name.

Professional Qualifications

Category:
License

Type:
Substance Use Disorder Counselor (SUDC)


Issuer Name:

Include in Display Name

Effective:
5/1/2015

Has end date

Profile

 **Jones, Ashley, SUDC**
Female
Date of Birth:

Locking Staff Member Access

When a user's access to the system needs to be taken away for any reason, the Staff Administrator can "Lock" a user account. The Staff Administrator can reach the Lock Agency Access action in 2 ways.

Option 1: Staff Member Search Screen

1. From the **Staff Member Search Screen**, you can select the **Lock Agency Access** action from the list screen for the staff person you wish to lock.

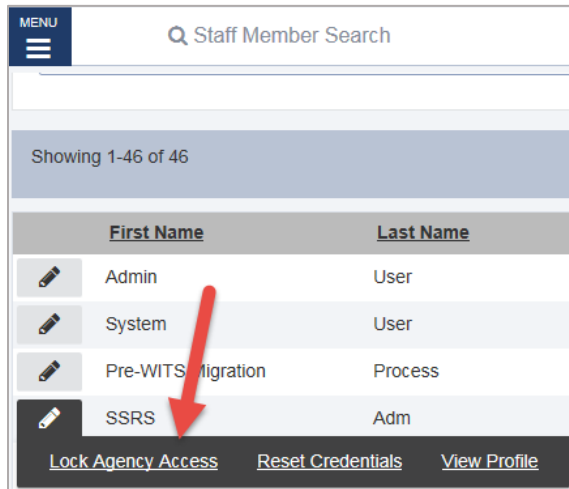
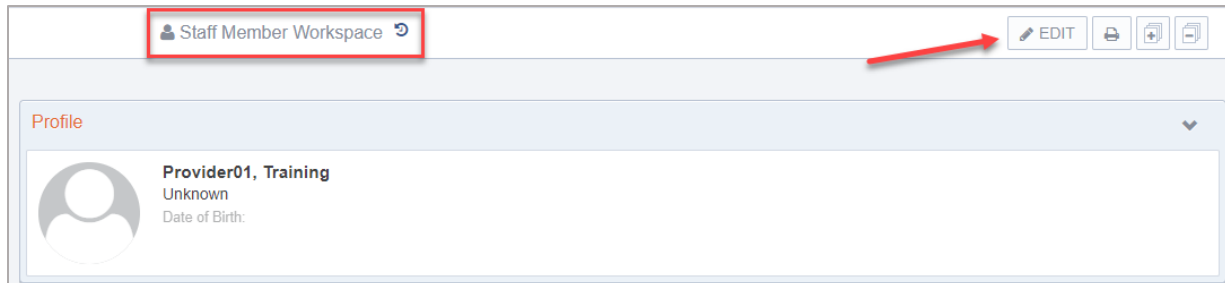


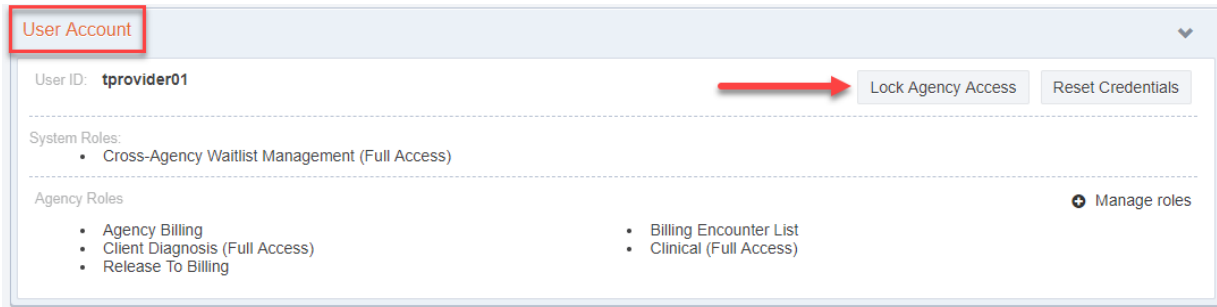
Figure **Error! No text of specified style in document.**-16: Staff Member Search Screen, Lock Agency Access

Option 2: Edit Staff Member Account

From within the **Staff Member Workspace**, the Staff Administrator can Edit the workspace and use the User Account panel to select the **Lock Agency Access** action.

2. Click **Edit**.





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

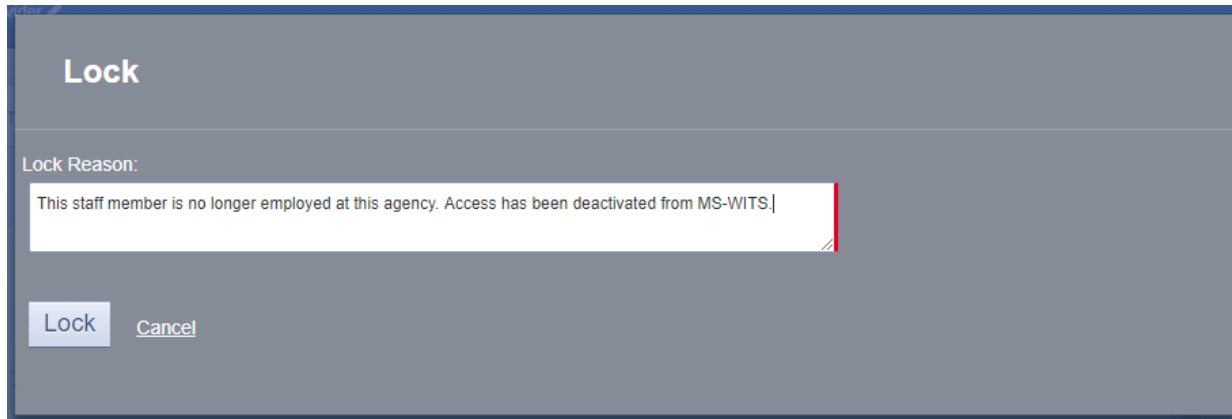
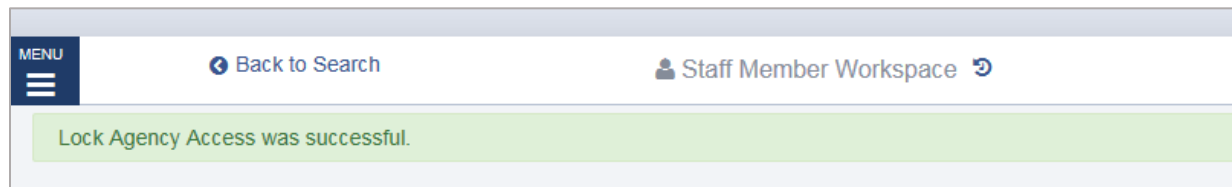
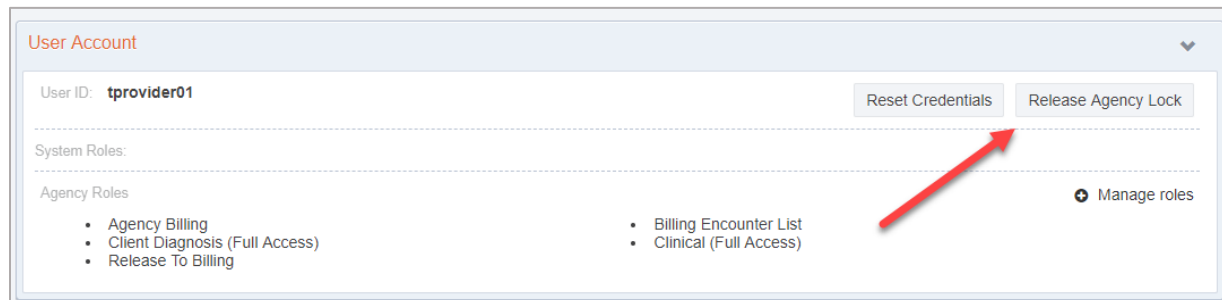


Figure **Error! No text of specified style in document.**-17: Lock Reason

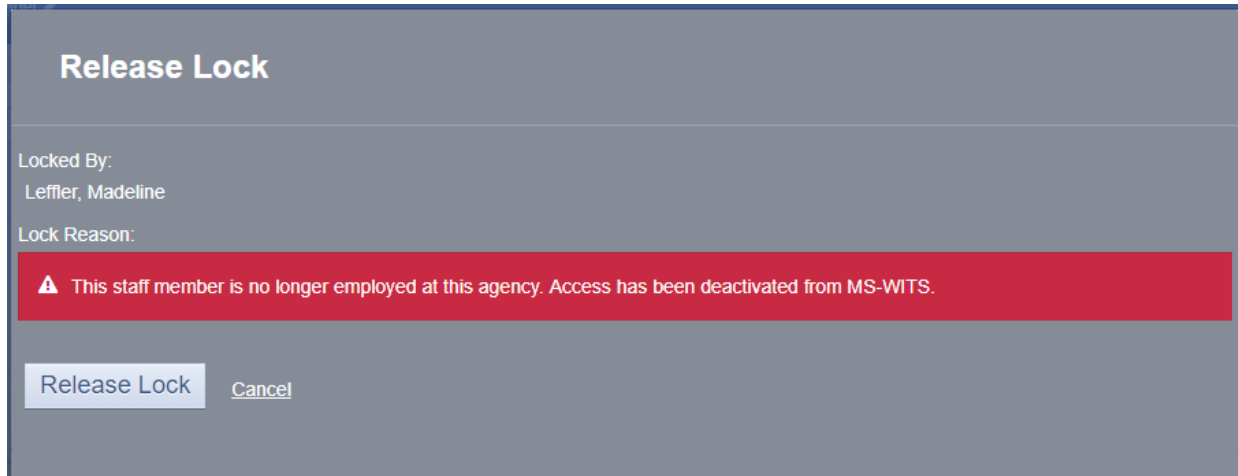
6. When you click **Lock**, the user will see the “Lock Agency Access was successful” message at the top of the workspace.



7. This staff member can no longer gain access to WITS.
8. If for some reason, you want to release this lock, a Staff Administrator can get to the Release Agency Lock from the **Staff Member Search** screen or use the **Staff Member Workspace** User Account panel to **Release Agency Lock**.



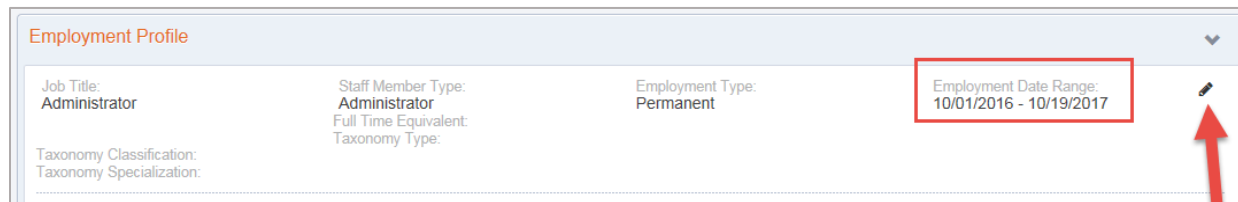
9. Release Lock window displays the Lock Reason that was entered in red, Staff Administrator can select the **Release Lock** action.



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



i **Note:** When an individual is no longer working for an agency, a Staff Administrator can Staff Member Workspace and edit the Employment Profile panel and enter an End Date for the Employment Date Range. Entering an End Date, will remove that person's name from appearing in drop down values 30 days after the End Date entered.



Agency Oversight Assignment (DCF WITS Administrators Only)



Where: System Administration > Agency Oversight Assignment

In order for Managing Entities to administer staff accounts at their contracted provider organizations, follow the steps below to grant those users access. **IMPORTANT** – This should be completed **ONLY** for Managing Entity staff responsible for administering staff accounts for their network or providers within WITS.

1. Click on **System Administration**.
2. Click on **Agency Oversight Assignment**.

The screenshot shows the Florida WITS interface. The top navigation bar includes the WITS logo and the text 'Florida WITS 18.41.5' and 'Administrative Agency, Administrative Unit'. The left sidebar menu is expanded to 'System Administration', with 'Agency Oversight Assignment' selected. The main content area is titled 'Agency Oversight Assignment' and contains a 'Staff Agency' dropdown menu (highlighted in yellow), a 'Staff' dropdown menu, and an 'Oversight Agency Access' section. This section includes two lists: 'Agencies Available' (Administrative Agency, Big Bend Treatment Center, Department of Children and Families, Managing Entity, Managing Entity 2, Provider 1, Provider 2) and 'Agencies Selected'. A 'Filtered Client Access' dropdown is set to 'Yes'. At the bottom of the section are 'Cancel', 'Save', and 'Finish' buttons.

3. Select the **Staff Agency** dropdown. Note - this selection should be one of the Managing Entity agencies.

This close-up screenshot shows the 'Staff Agency' dropdown menu open. A red arrow points to the dropdown menu. The dropdown list includes: Administrative Agency, Big Bend Treatment Center, Department of Children and Families, Managing Entity, Managing Entity 2, Provider 1, and Provider 2.

4. This will then populate the **Staff** dropdown with all the users within that agency who have an “Agency Oversight” role assigned. Select the **Staff** member you wish to assign oversight into other agencies.

Agency Oversight Assignment

Staff Agency: Managing Entity 2

Staff: Snow, Jon

Oversight Agency Access

Agencies Available: Administrative Agency, Big Bend Treatment Center, Department of Children and Families, Managing Entity, Managing Entity 2, Provider 1, Provider 2

Agencies Selected: (empty)

5. Select the **Oversight Agency Access** for which this user should have administrative oversight. Use the dual list box to select one or multiple agencies.

⚠ Important - ONLY set up oversight access to those Managing Entity staff members who are responsible for staff administration at the provider organization.

Agency Oversight Assignment

Staff Agency: Managing Entity 2

Staff: Snow, Jon

Oversight Agency Access

Agencies Available: Administrative Agency, Big Bend Treatment Center, Department of Children and Families, Managing Entity, Managing Entity 2

Agencies Selected: Provider 1, Provider 2

Filtered Client Access: Yes

Buttons: Cancel, Save, Finish

6. Once the Oversight Agency Access is selected, click **Save** or **Finish**.

i Note: The Filtered Client Access field defaults to Yes. There is no need to change this as it relates to client-level access at the oversight agency, which is not being done in Florida WITS.