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").

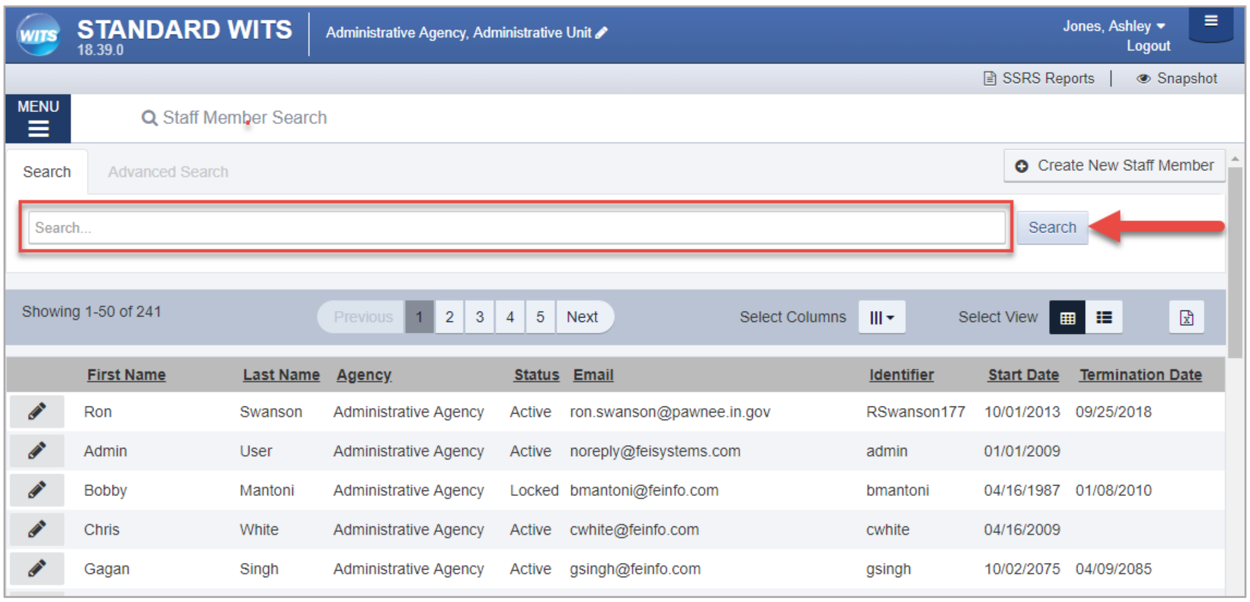
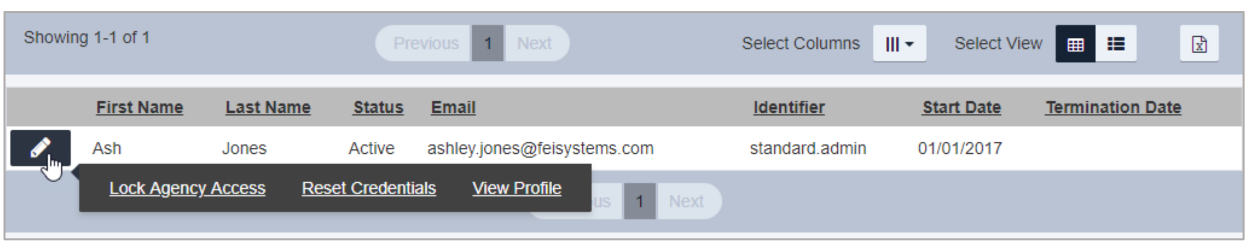
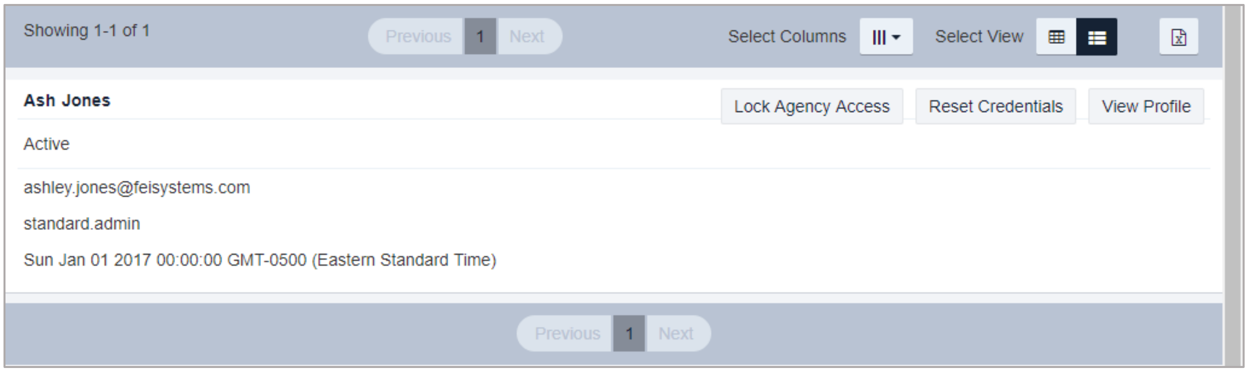


Figure **Error! No text of specified style in document.**-1: Staff Member Search/List screen

Table View



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)
Previous
1
Next

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**.

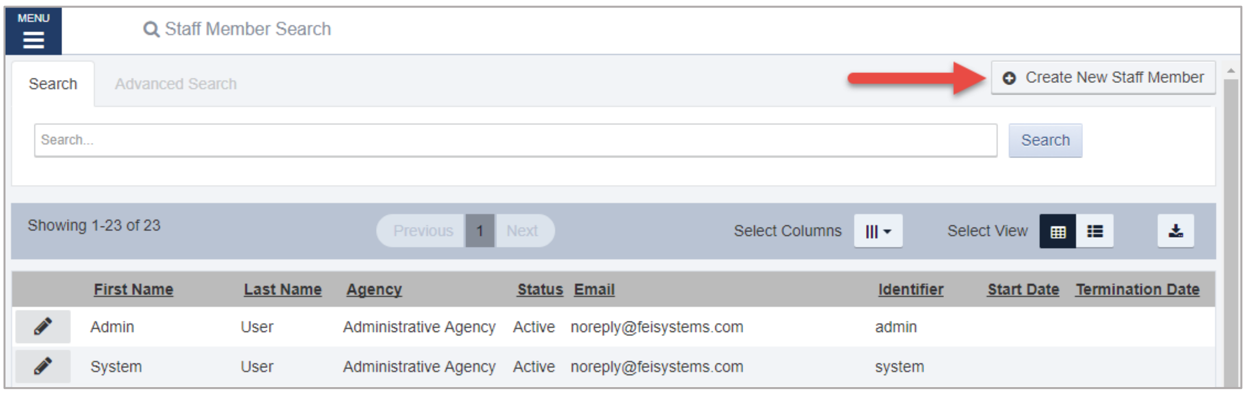


Figure **Error! No text of specified style in document.**-2: Staff Member screen

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.

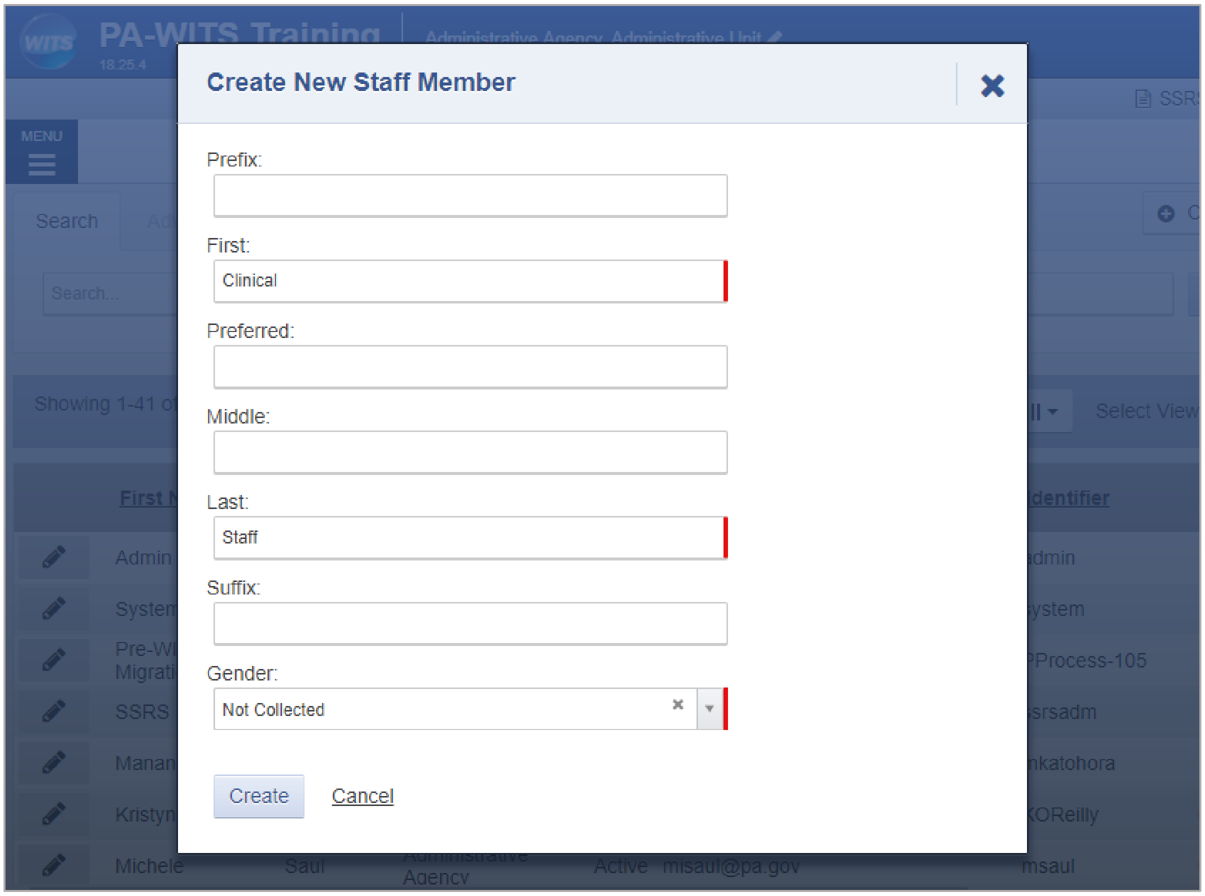


Figure **Error! No text of specified style in document.**-3: Create New Staff Member screen

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.

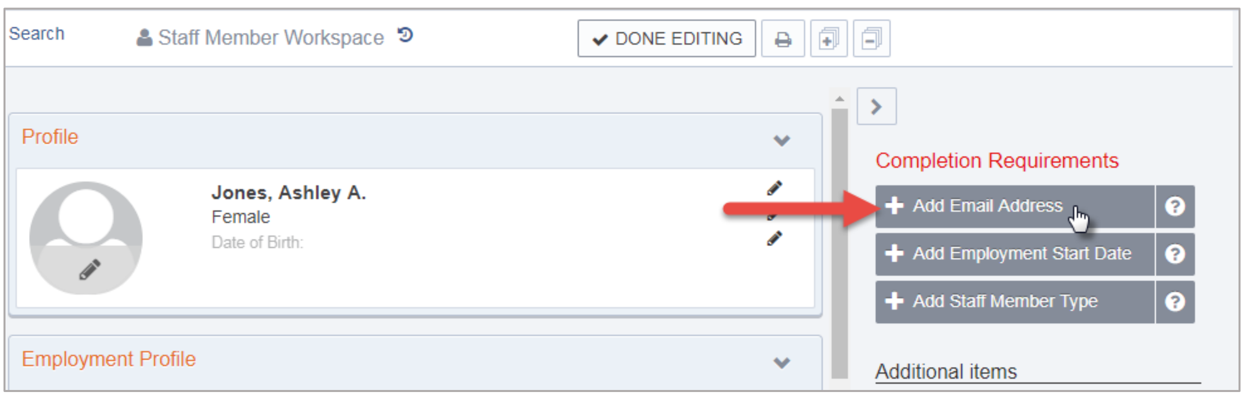


Figure **Error! No text of specified style in document.**-5: Completion Requirements, Add Employee Start Date

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

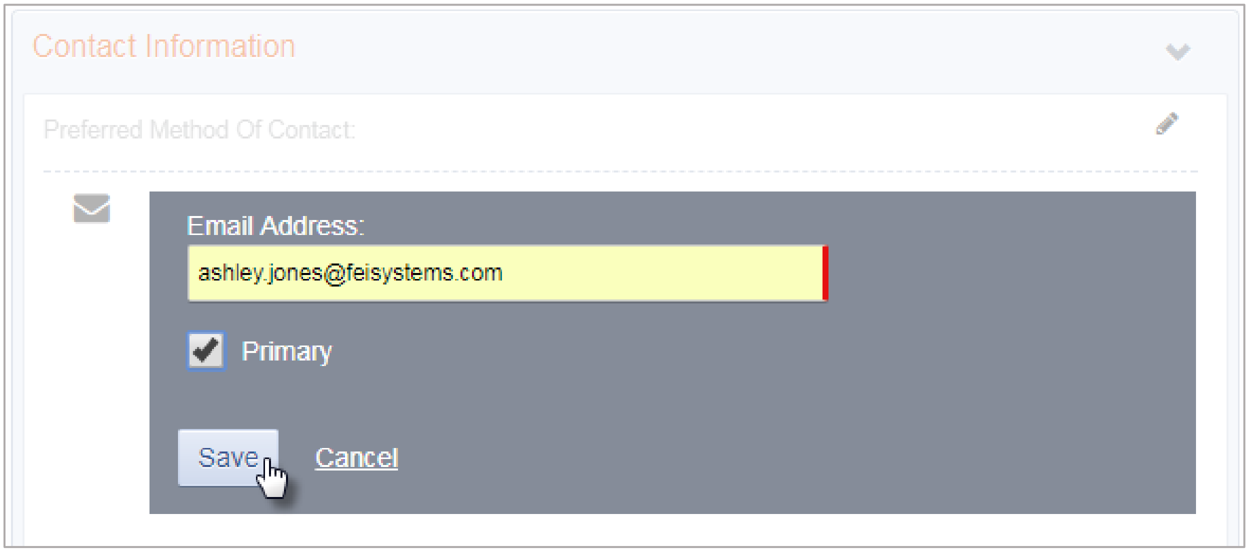


Figure **Error! No text of specified style in document.**-6: Contact Information panel, add primary email address

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.

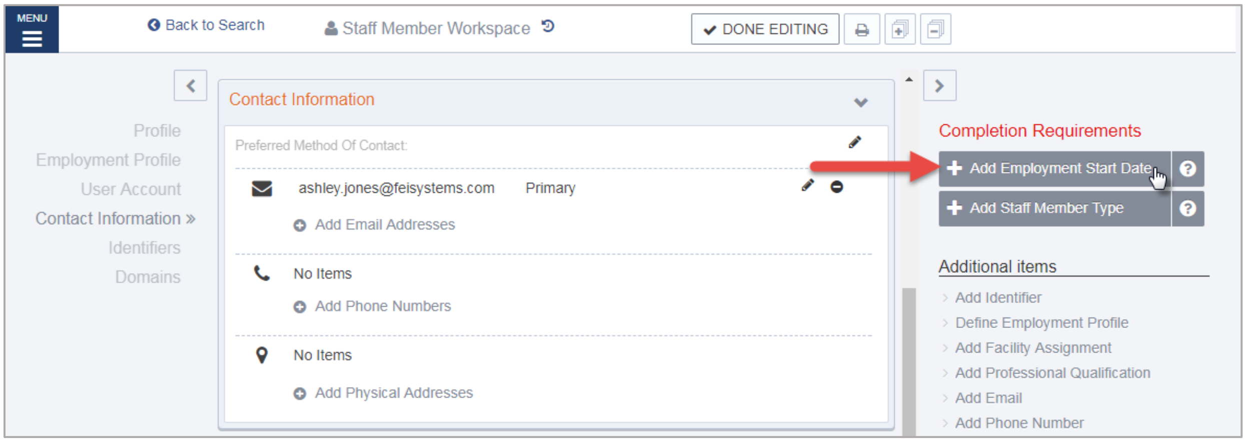


Figure **Error! No text of specified style in document.**-7: Add Employment Start Date

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.

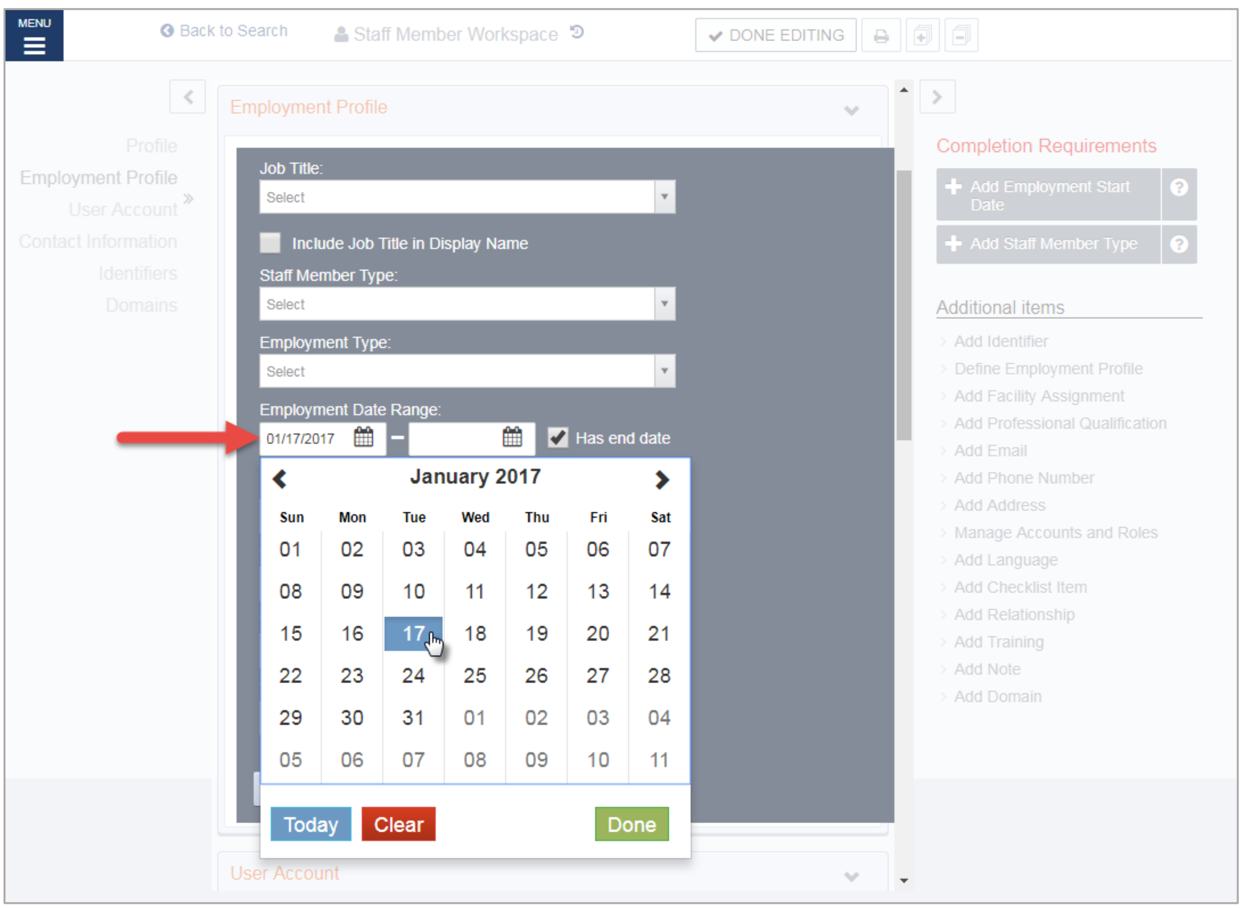


Figure **Error! No text of specified style in document.**-8: Employment Profile panel, Employment date range

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.

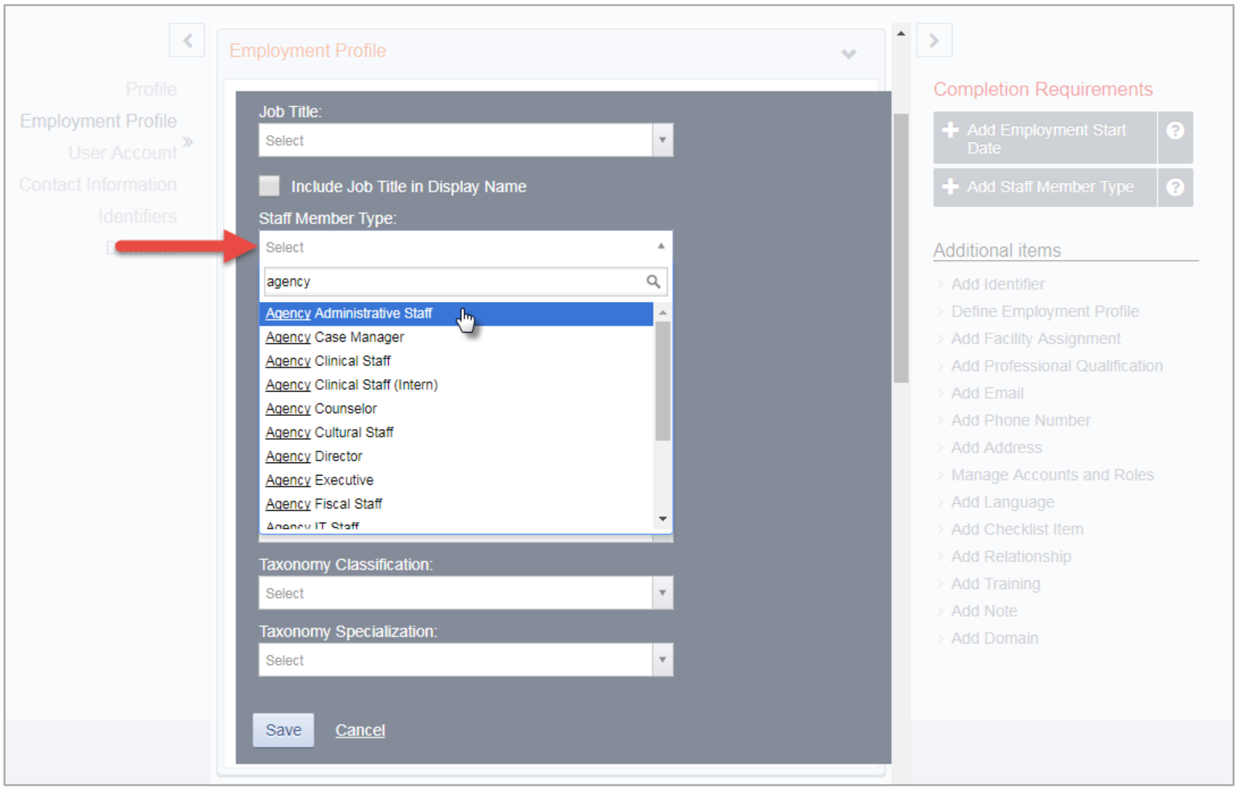


Figure **Error! No text of specified style in document.**-9: Employment Profile panel, Staff Member Type field

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

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**.

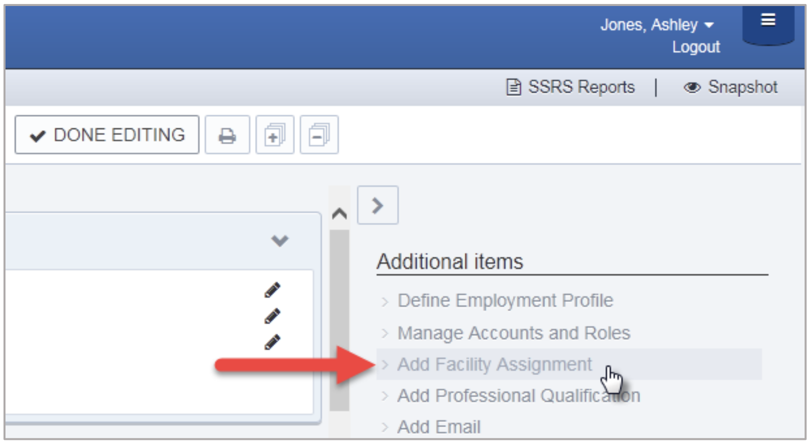


Figure **Error! No text of specified style in document.**-10: Additional Items section, Add Facility Assignment

2. In the Facility Assignments section, click on the applicable facilities.

3. Select the **Effective Date**.

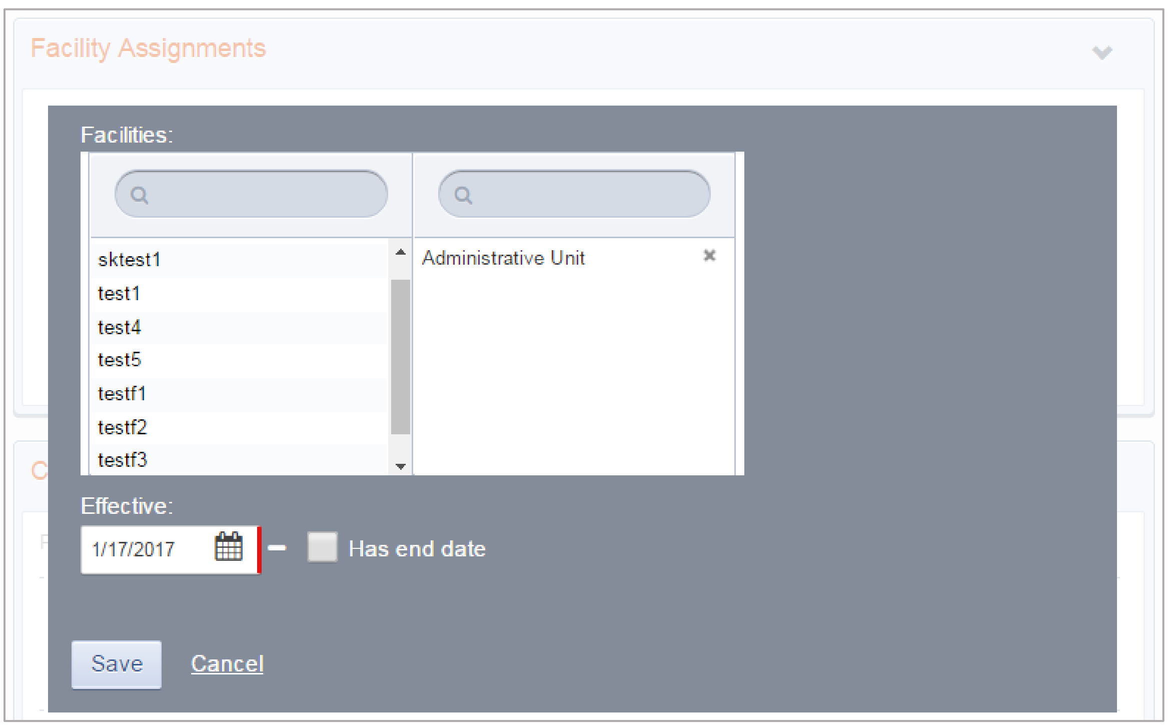


Figure **Error! No text of specified style in document.**-11: Facility Assignments panel

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**.

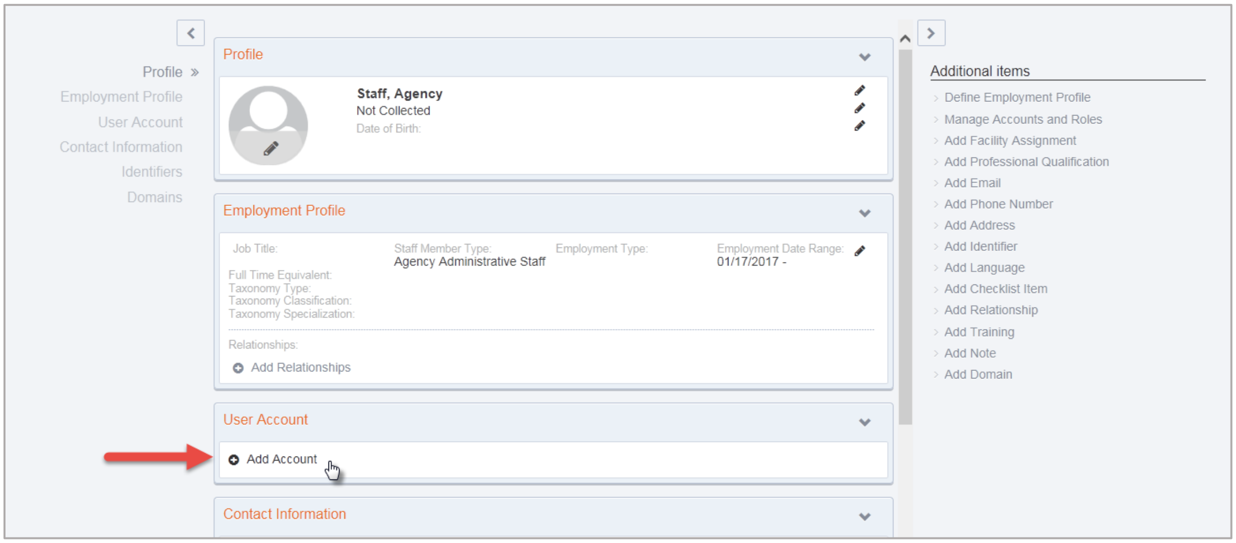


Figure **Error! No text of specified style in document.**-12: User Account panel, Add Account

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.

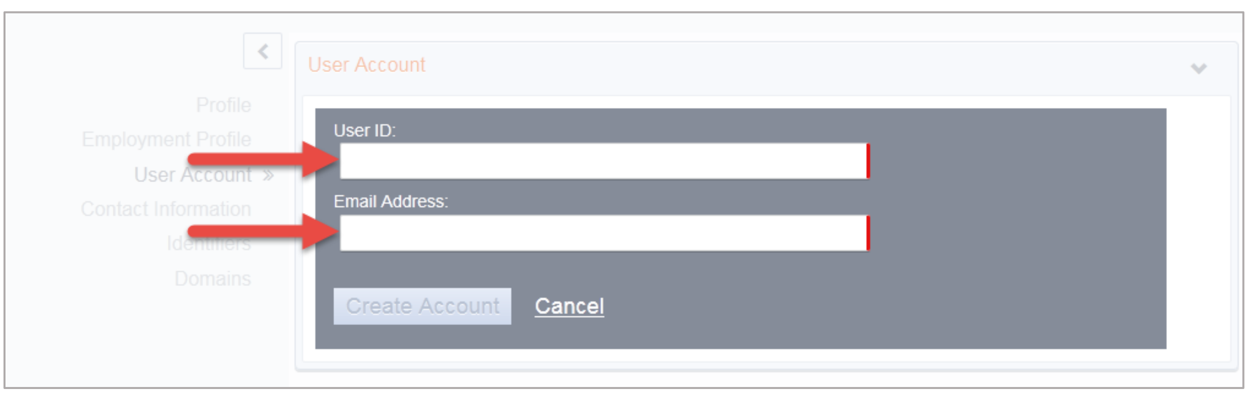


Figure **Error! No text of specified style in document.**-13: User Account panel, required fields

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 *Note – this should only be provided to users responsible for support/agency administration.*

Assign User Roles

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

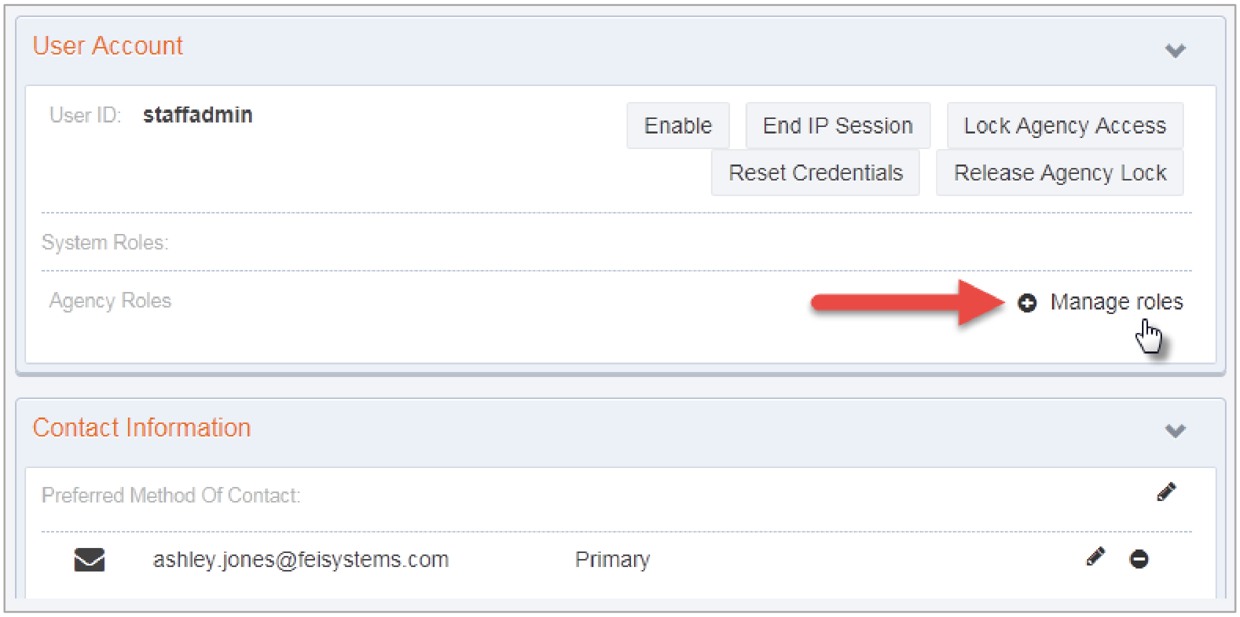


Figure **Error! No text of specified style in document.**-14: User Account panel, Manage Roles link

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.

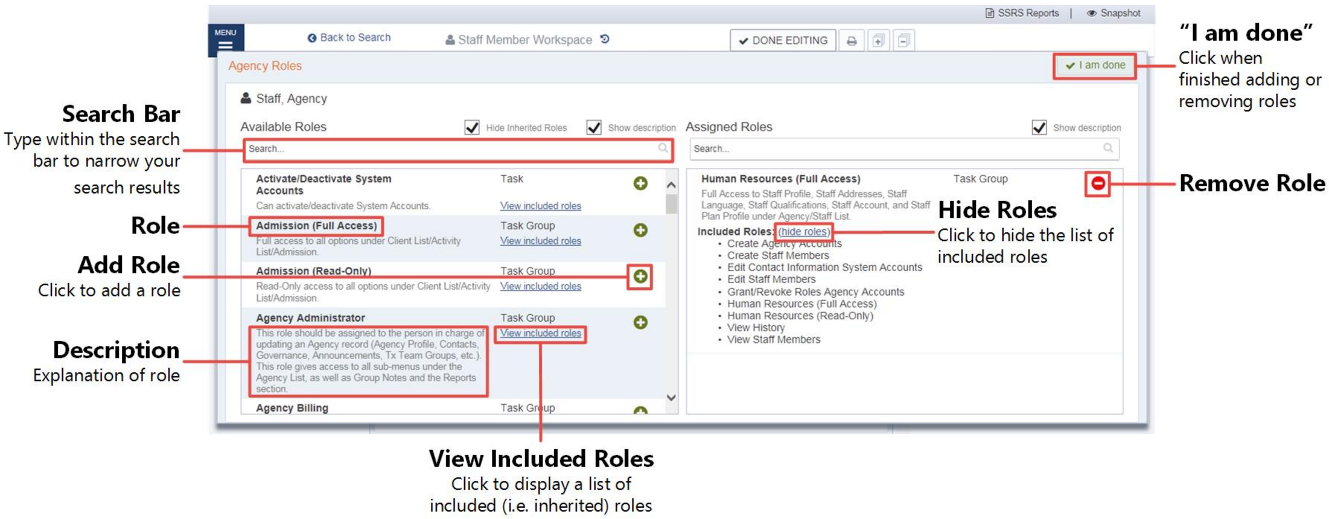
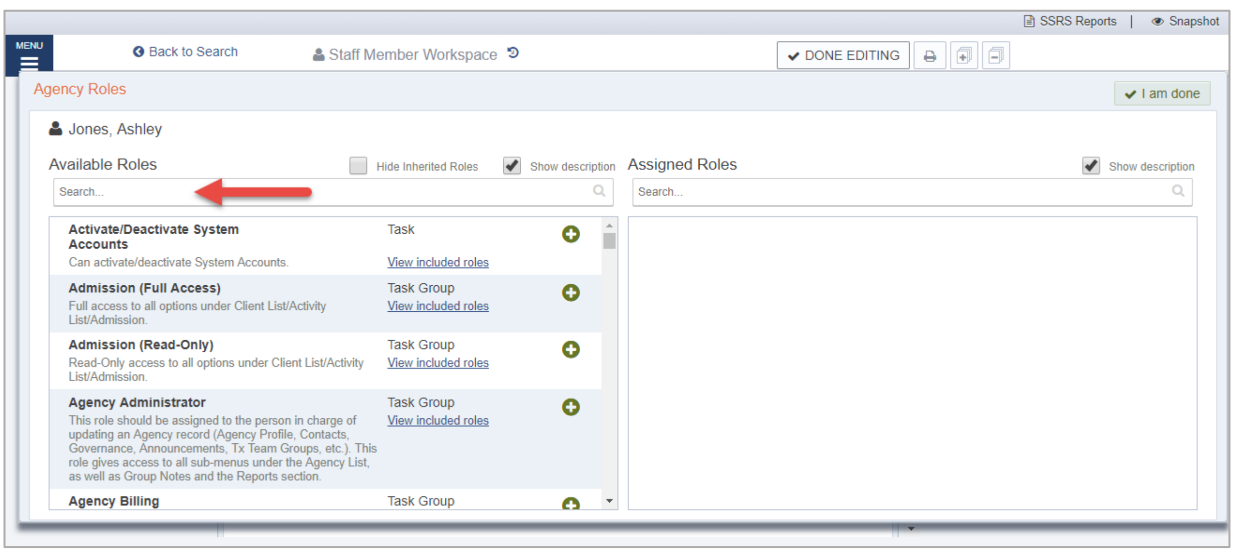


Figure **Error! No text of specified style in document.**-15: Manage Roles Screen

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



3. To add a role, click the green plus sign. To remove a role, click the red minus sign.

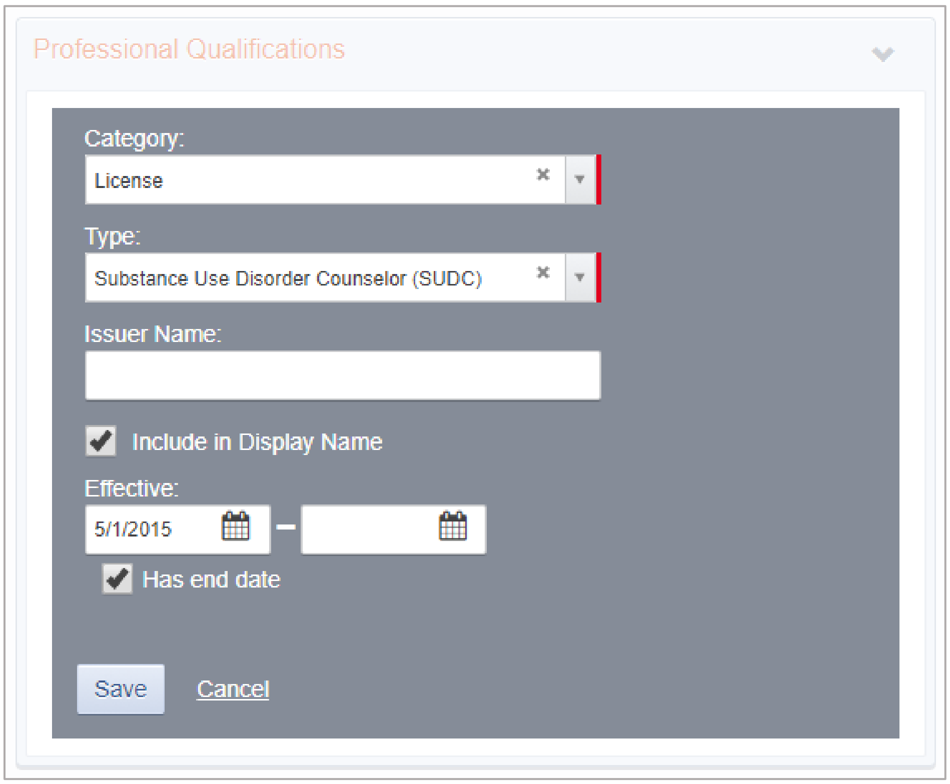
4. When finished assigning roles, click **I am done.**

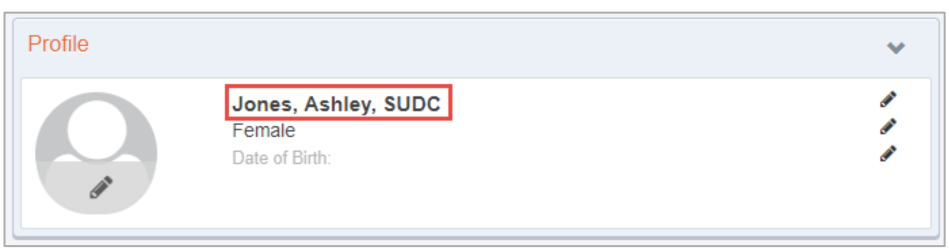
Adding additional items to a profile

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.





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.

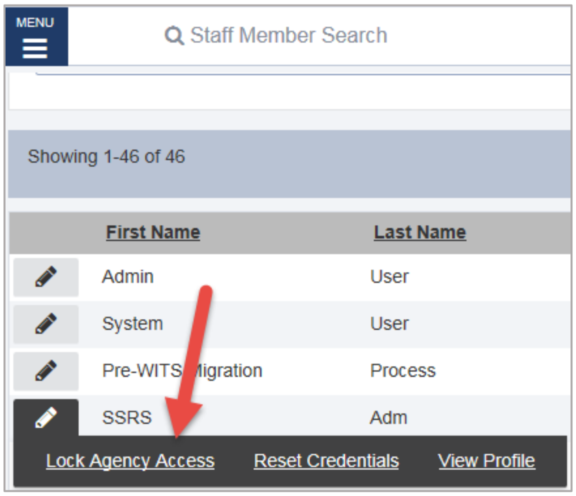
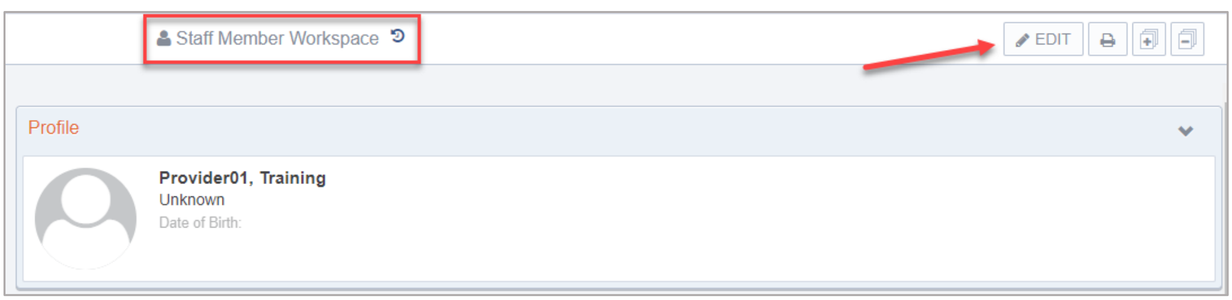


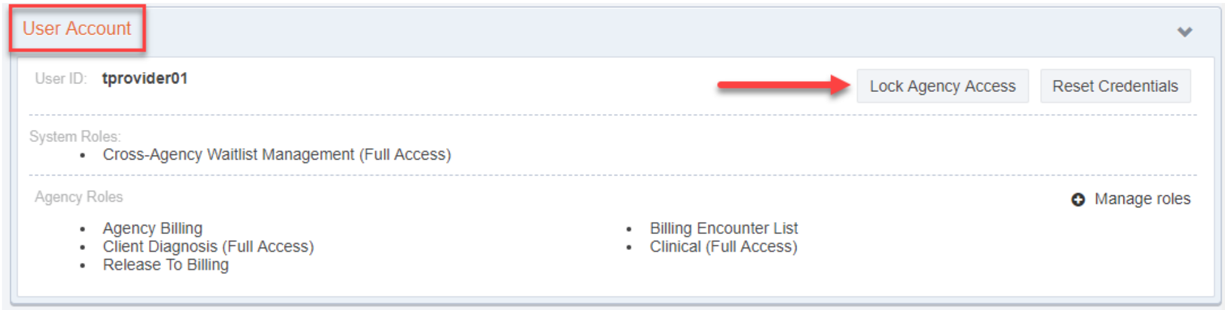
Figure **Error! No text of specified style in document.**-16: Staff Member Search Screen, Lock Agency Access

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**.

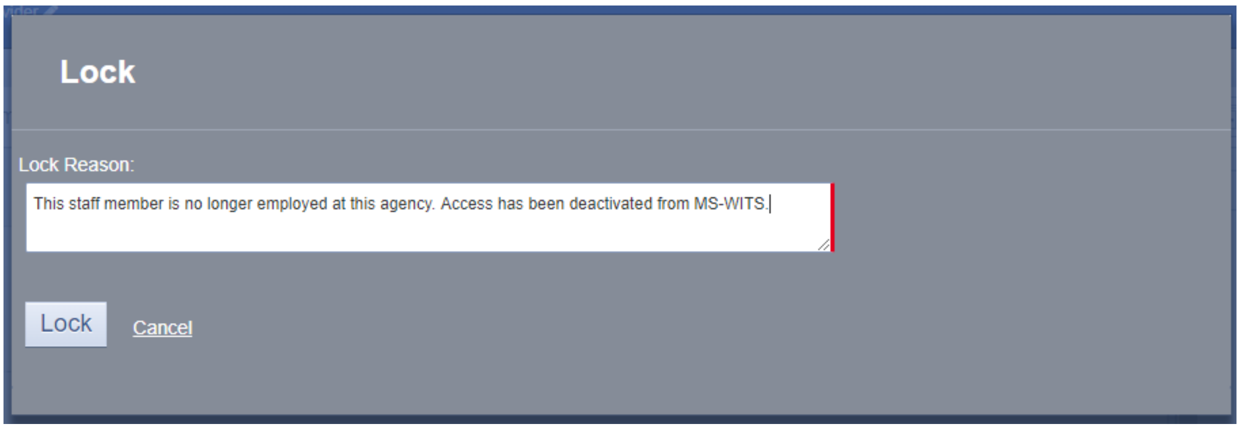
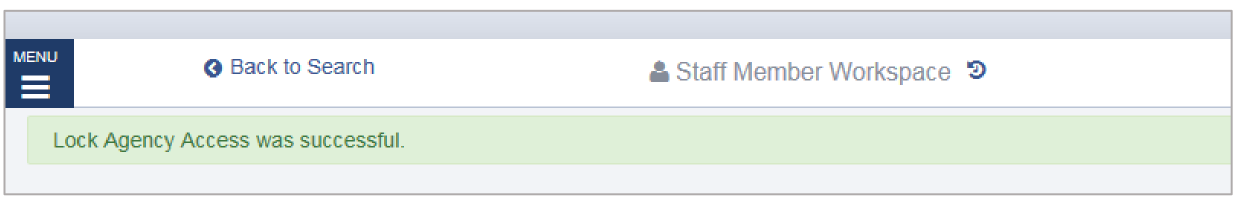


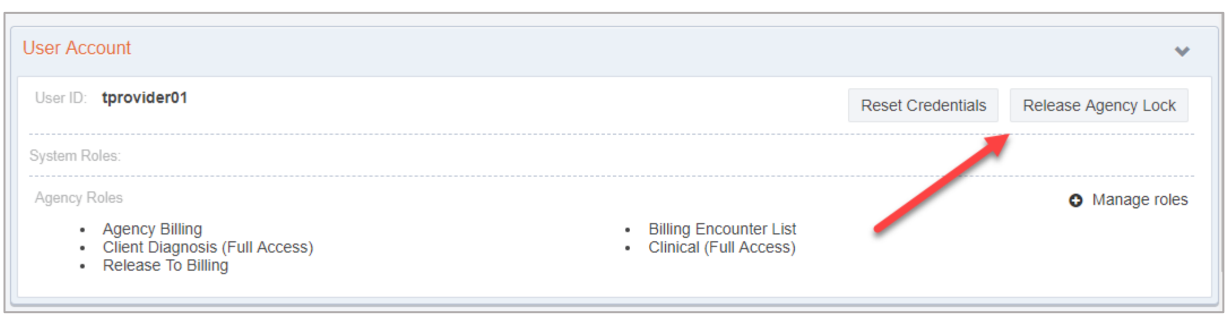
Figure **Error! No text of specified style in document.**-17: Lock Reason

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

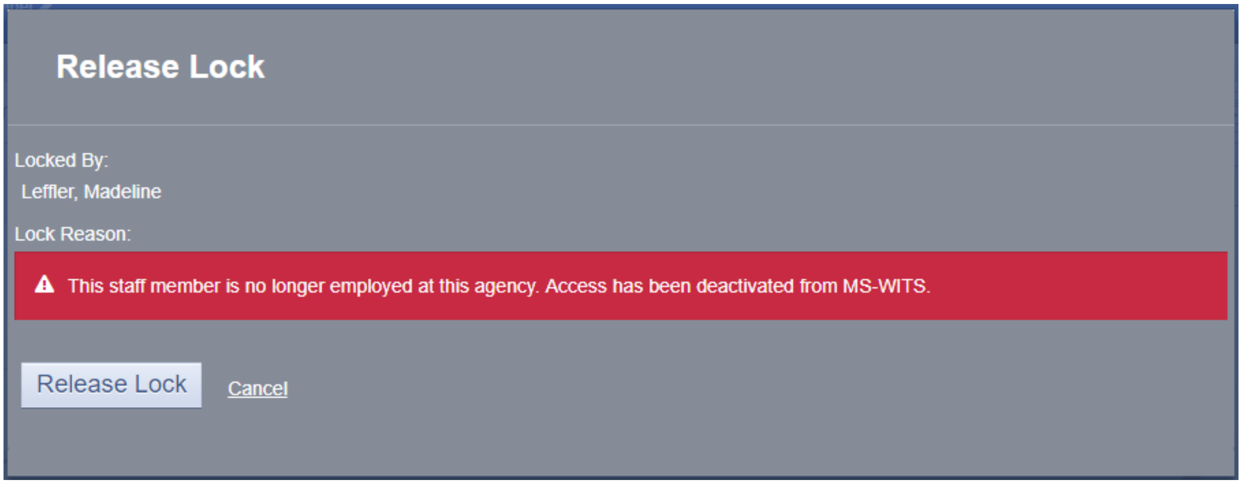


7. This staff member can no longer gain access to WITS.

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**.

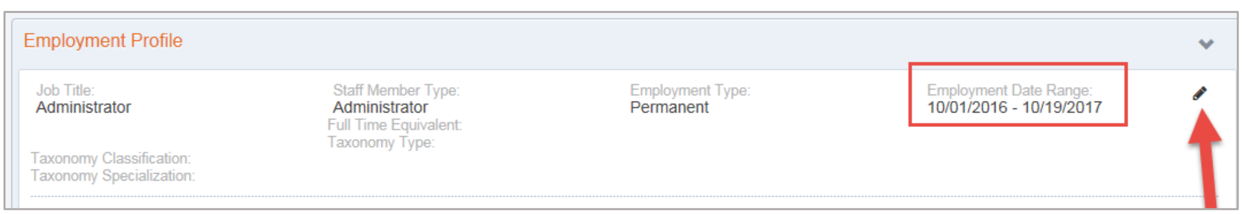


9. Release Lock window displays the Lock Reason that was entered in red, Staff Administrator can select the **Release Lock** action.



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

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.



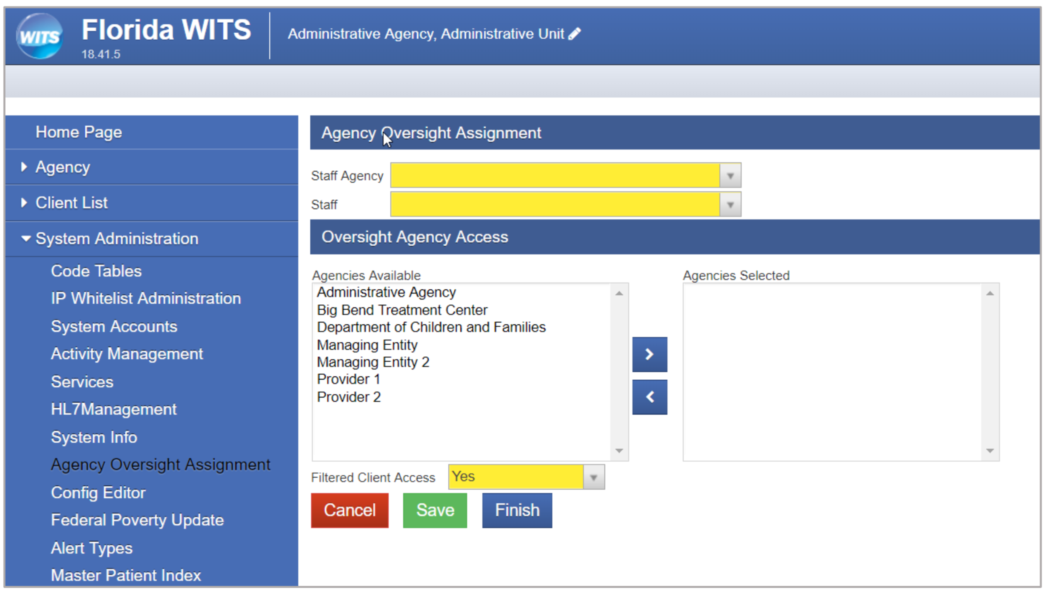
Agency Oversight Assignment (DCF WITS Administrators Only)

Where:* System Administration > *Agency Oversight Assignment

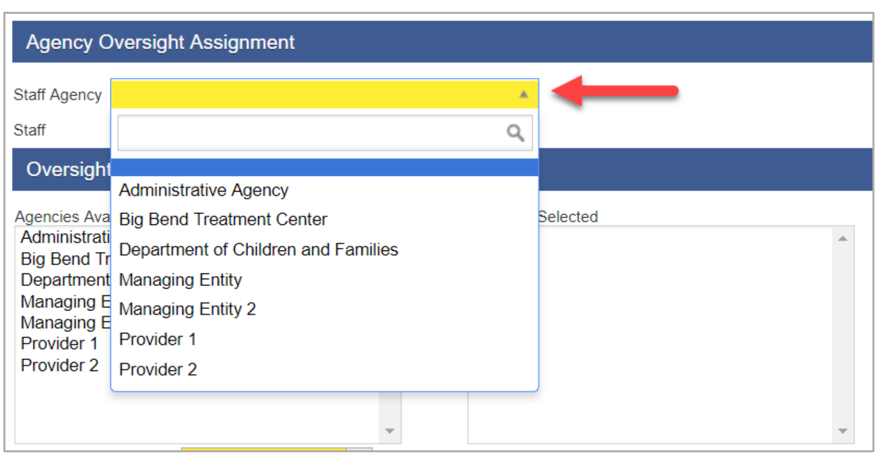
In order for Managing Entities to administer staff accounts at their contracted provider organizations, follow the steps below to grant those users access. **IMPORTANT** – This should be completed ONLY for Managing Entity staff responsible for administering staff accounts for their network or providers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

1. Click on **System Administration**.

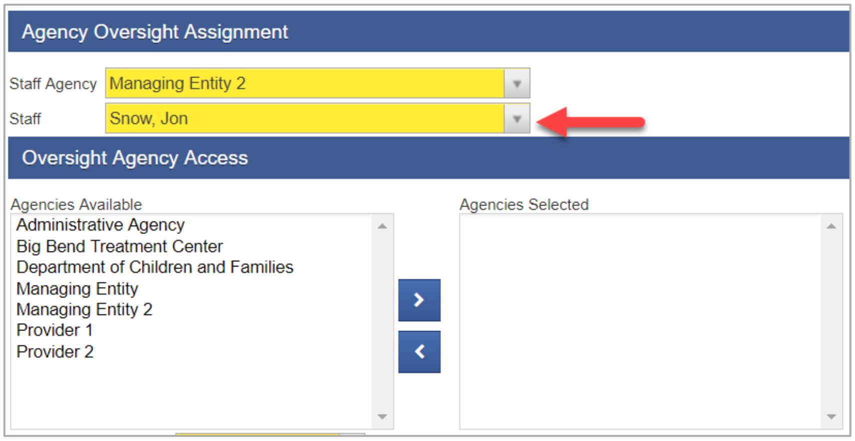
2. Click on **Agency Oversight Assignment**.



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

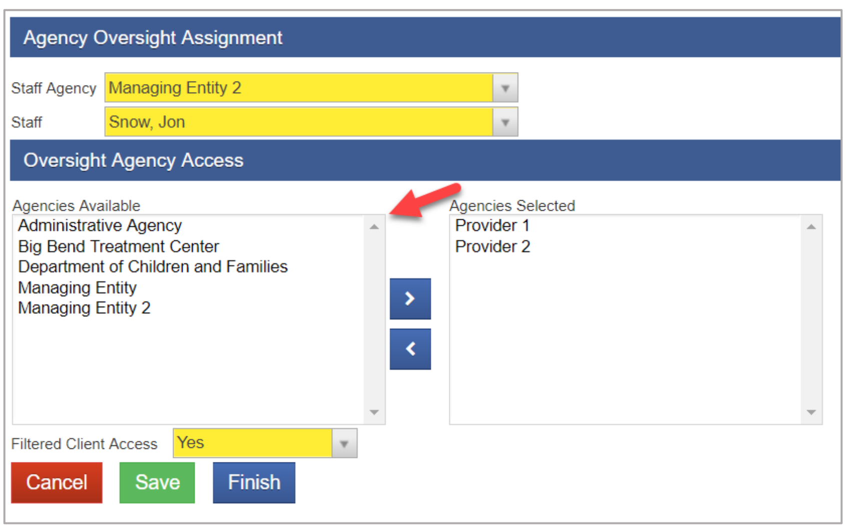


4. This will then populate the **Staff** dropdown with all the users within that agency who have an "Agency Oversight" role assigned. Select the **Staff** member you wish to assign oversight into other agencies.



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.



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

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.