UWITS Administration Guide

An outline of the basics of UWITS System Administration and Frequently Asked Questions.

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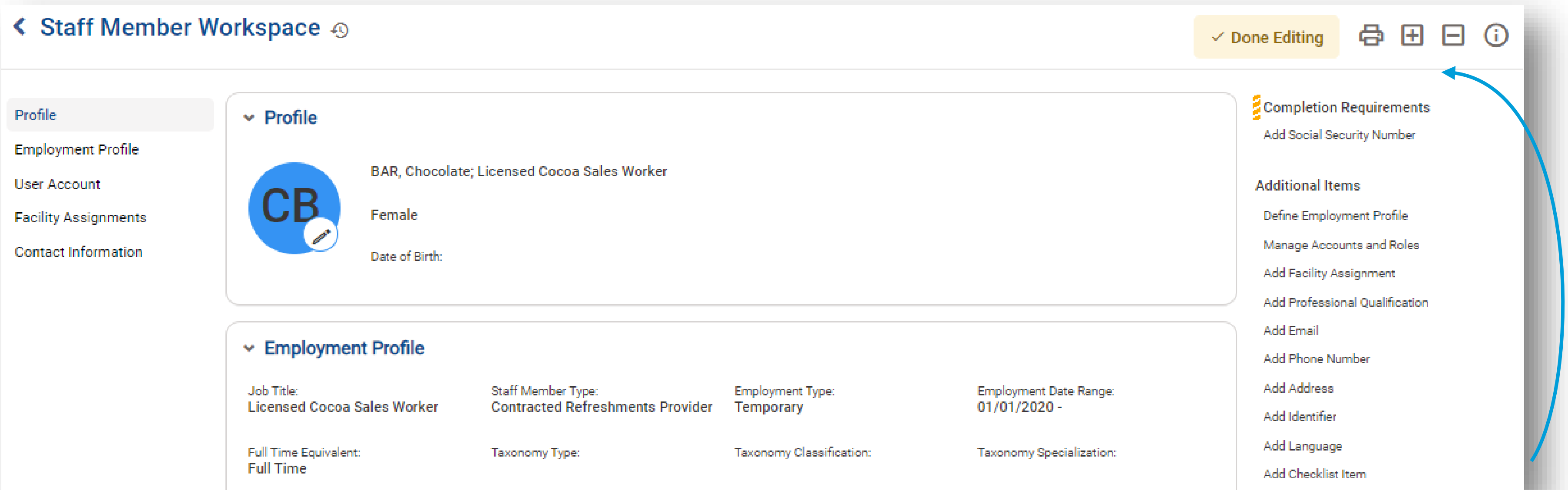
Intro to the Staff Members Module

Please see the **Staff Module User Guide** for the following instructions:

- Searching for a staff member
- Adding a staff member profile
- Adding a staff member account
- Enabling a staff member account
- Reset Credentials
- Locking and unlocking accounts
- End IP Session
- Logging in and logging out
- And the difference between Agency Accounts and System Accounts



Tip! As you manage your agency's user accounts, please be aware that although the Social Security Number field is required by the Staff Members module, it does NOT need to be the actual number.

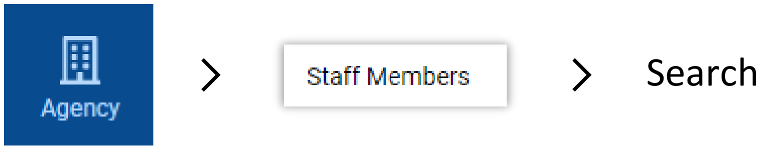
It is up to Agency's discretion as to using the staff member's actual Social Security Number or populating with 999-99-9999 or 000-00-0000.

Please note that 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.

Changing a UWITS User ID (Dissociate)

Changing a user's User ID (username) in UWITS cannot be done by simply editing the User ID. It requires the current User ID be dissociated from the User Profile and a new User ID be created. This removes all UWITS roles assigned to this staff member and requires they be added in again.

A user needs to be granted the **Can Associate/Dissociate Agency Account** role to perform this action.

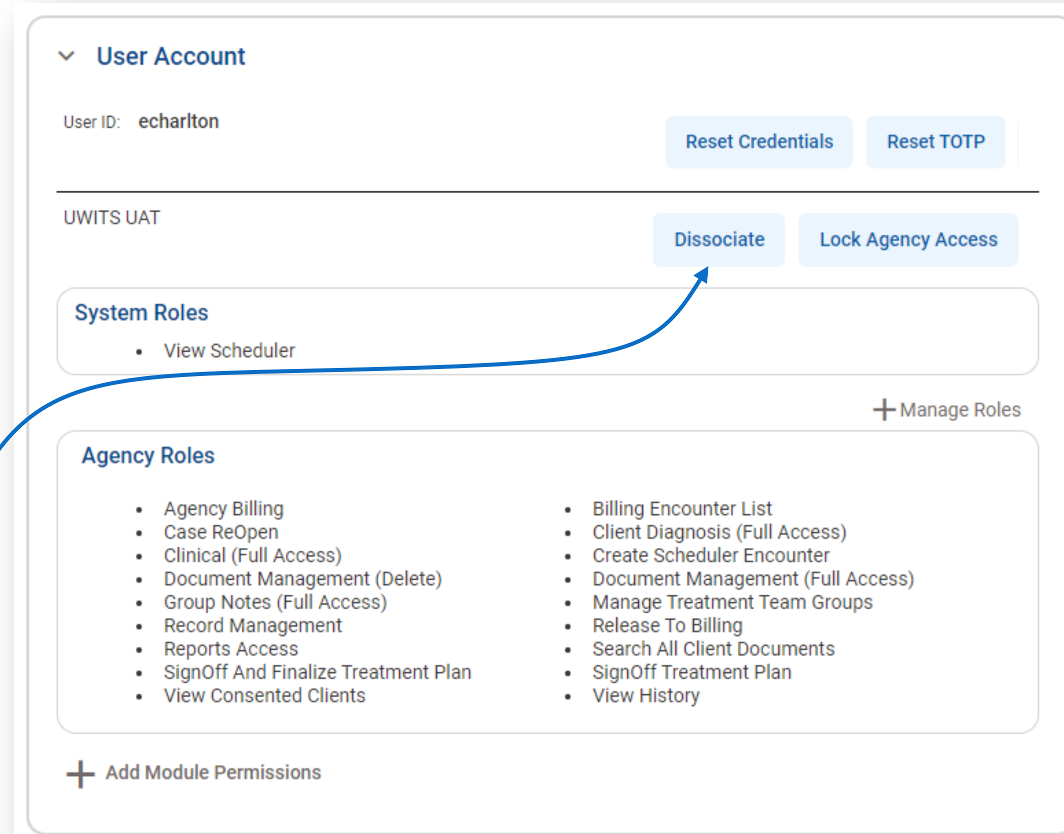


First, locate the user in the Staff Members module by clicking on Agency then Staff Members. Search for the staff member, hover over the action button (⋮) then click on the **View Profile** option.

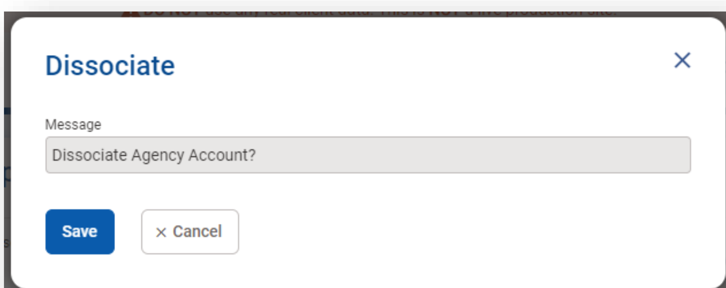
Second, note the user's current role assignments. This information will not be available later.

Click on the **Edit** button at the top of the page then navigate to the **User Account** panel.

Next, click on the **Dissociate** button to remove the current user ID.



Verify to dissociate the agency account.



At this point, create the new account by clicking on the **+ Add Account** link to create a new User ID. Each User ID must be unique and cannot be duplicated in the UWITS system.

Add the user's UWITS roles to their new User Account, as needed.

Frequently Asked Questions

Login Issues

Many login issues can be addressed by the same set of solutions. Start at the top of this list and work down. Email us for assistance at uwitssupport@slco.org anytime.

Common Error Messages

"You have exceeded the maximum number of log-in attempts."

When users receive this error, their account may or may not actually be locked. This error message usually means one of two things: (1) either they have tried three or more times to login and their account has now been locked, or (2) an incorrect User ID has been entered.

If the user's account has actually been locked, their Agency Navigator can unlock the account, after which the user can try again. However, if the user receives this message but their account has <u>not</u> been locked then it usually means that an incorrect User ID has been entered. Please note that this is not always as simple as it may seem! Many browsers have an auto-fill feature which can be less than helpful since an <u>incorrect</u> User ID may be auto-filled into the UWITS login screen by the web browser. Remove the incorrect User ID and enter the correct one to move forward.

"You will be redirected momentarily"

When staff receive this message, they may not actually be redirected. When this message is received, clicking on the UWITS Bookmark may be all that is needed. If not, check to make sure that they user's account is not locked. If this does not help, keep reading!

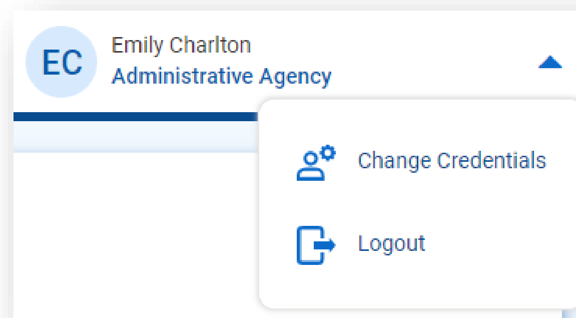
The Checklist

Clear Cache; Clear Cookies

Please start by asking the user to clear their browser cookies and cache. Then ask the user to login again. If issues persist, continue these instructions.

Setup a new Bookmark to UWITS

Ask the user to verify that they are using the correct web address for UWITS: https://ut.witsweb.org.



Logout Every Time

If there is an **End IP Session** button on the user's account when the user is telling you that they are not logged in then click on the button.

Users should ***<u>always</u>*** click on the **Logout** link when ending their UWITS session. Answer the question **Yes** when asked "Are you sure you want to log out?"

When a user has been working in UWITS at one IP address and does not logout before attempting to login to UWITS from another IP address, UWITS will prevent the user login at the new IP address. This continues until the previous session has ended or timed out. A consistent routine of logging out properly will prevent this issue. Check the History screen to learn more.

If the User's Account is Locked

Once a user's account has been unlocked then they have until approximately 9 pm that night to login. Otherwise, the system will automatically relock their account. Once the staff member has logged in successfully then this automatic account locking will cease.

Verify the correct username is being used

UWITS no longer alerts users if they attempt to login with an incorrect username. Share the user's correct username and ask them to copy-and-paste it into UWITS—watching for spaces. Alternatively, ask the user to check their username at the "Forgot password?" screen. This screen does alert users of incorrect usernames.

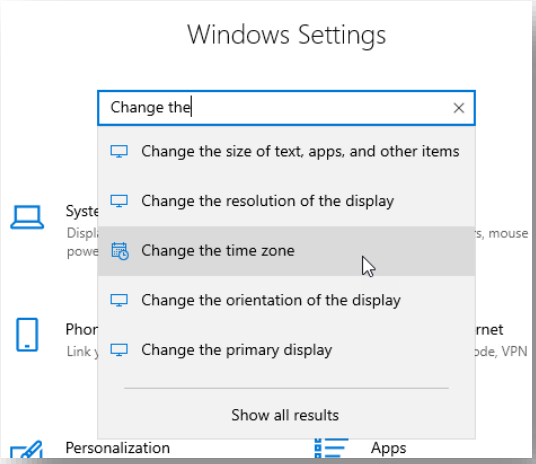
Avoid Saving Passwords in the Web Browser

Instruct your staff not to save passwords in browser memory as this creates issues. To correct the related login issues please complete the following steps in this specific order:

1. Remove saved passwords for UWITS.
2. Remove saved password exclusions for UWITS.
3. Clear cache and cookies.
4. Close and then reopen the browser.

If issues continue, it can be beneficial to repeat these steps.

Tip! Removing saved passwords can be a struggle. Clearing cache and cookies then closing and reopening the browser a second time may be helpful.



Avoid using the AutoFill feature

Using the AutoFill feature of many web browsers will offer (perhaps incorrect) suggestions for a person's username. In addition, CAPS LOCK is even more problematic than usual because a user has no visual reminder on the screen to remove the CAPS LOCK before entering their password.

Check the Time Zone

Although rare, it is possible to have login issues if the phone used for TOTP is set to a different time zone than the computer used to login to UWITS. Check the time zone for both devices and set to the same time zone.

Remember to enter the 6-digit code at the bottom of the QR Code screen when setting up TOTP

A common mistake users make is to forget to scroll down and enter the 6-digit code as they are setting up their TOTP. Remind users that this is a very important step. Until this is complete and they see the screen that says "Success" then their TOTP has not been setup correctly.

Long-time user accounts staying locked

If you have tried all of the above solutions and the user is still experiencing locking issues, they may have a System Lock on their account that would need to be cleared by a WITS Administrator. If your users ever do experience this, please send an email to the UWITS Support box to request assistance.

Staff Member attempting to reset their password is not receiving the reset emails with the links

First check that the email on the user's UWITS account is correct. If this does not resolve the issue, change the user's UWITS email address to yours. Attempt to send the emails to yourself to verify that the email is arriving. If it does not, you should contact your IT staff to investigate. If the email does come through, it may be best to set a temporary password for the user with the condition that it be changed upon next login. If the user is still experiencing issues with logging into UWITS, please send an email to the UWITS Support box to request assistance.

Tip! Clearing cache and cookies then closing and reopening the browser after changing browser settings may be helpful.

General System Administration Questions

What is the best browser for using UWITS?

Our vendor has indicated that they are completing their testing primarily in Chrome and Microsoft Edge. Internet Explorer is no longer supported. If users experience irregularities which may be a browser issue, please try using Chrome or Microsoft Edge to see whether the irregularity occurs in those browsers.

UWITS User ID Requirements

As of Release 20.0.1, UWITS User IDs must:

- only contain letters, digits, periods, dashes or underscores
- not contain the '@' character (i.e.: email addresses cannot be used as the user ID)
- begin and end only with a letter or digit (not a special character)
- not have two periods, dashes or underscores next to one another

We assigned a new UWITS Role to a user at my agency but the user still cannot do what the new UWITS Role enables. What now?

When assigning additional UWITS Role(s) to a user, the user must first log out and then login again before the new role(s) will be recognized. If you have any further issues, please contact UWITS Support for assistance.

What if I need to compare the values in two different screens?

Use the **Snapshot** feature to compare the values on two different UWITS screens.

It does appear that one can sign onto UWITS from multiple different brands of browsers and have multiple different tokens assigned to one user on the same computer at the same moment. This is not advised and perhaps should be considered a bug.

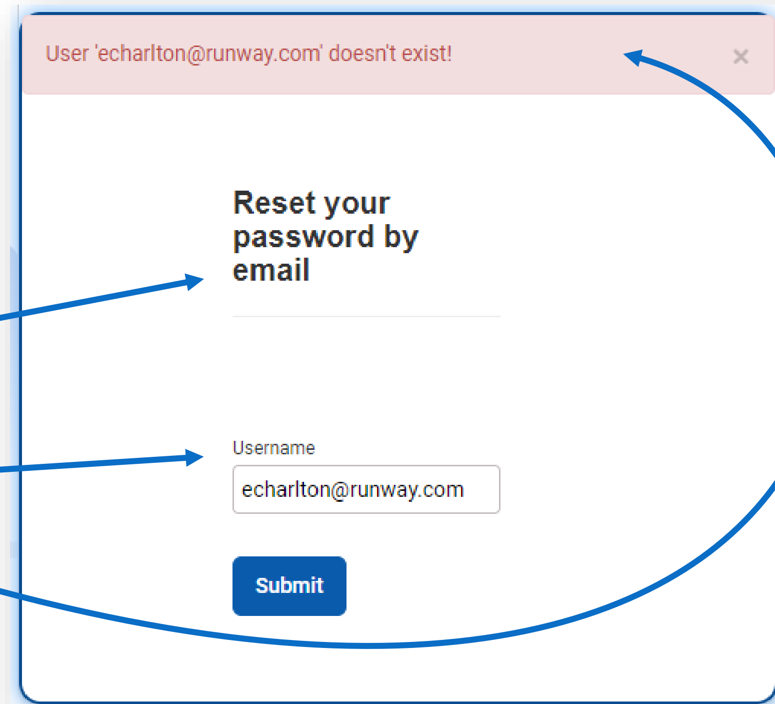
Forgot Password

When a user attempts to reset their password by using the Forgot Password link, the screen is confusing.

The screen is titled “Reset your password by email”.

However, the screen actually requests a username—not an email address.

If an email address (or a nonexistent username) is given then an error will appear.



Please instruct users to enter their username at this screen.

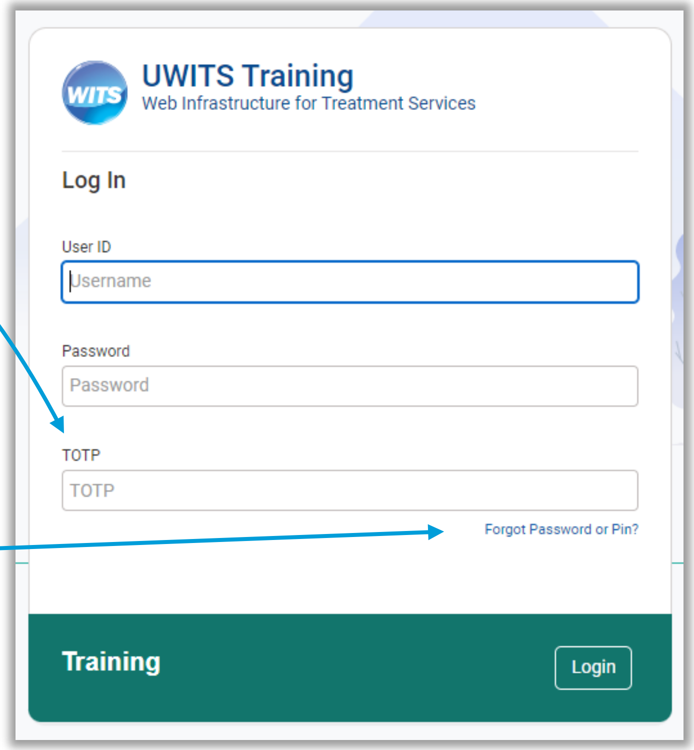
Getting Started with Multifactor Authentication

When you login to UWITS next, you will see a slightly different login screen. Instead of asking for a PIN, the screen will say **TOTP**.

To login successfully, you will need a TOTP Authenticator app (or add-on/extension in your browser).

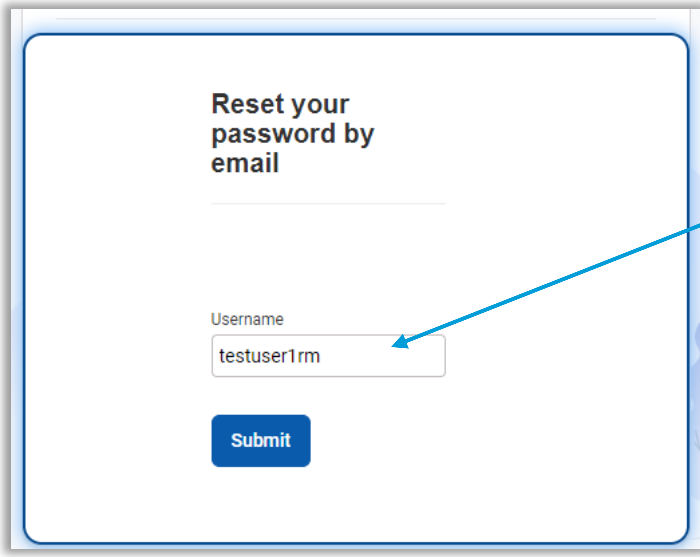
Please see your Navigator for assistance in selecting a TOTP Authenticator app. Select and install an authenticator then proceed to the next step.

Note: To find a TOTP Authenticator app, search for “TOTP Authenticator” in your cell phone’s app store or in a web browser.



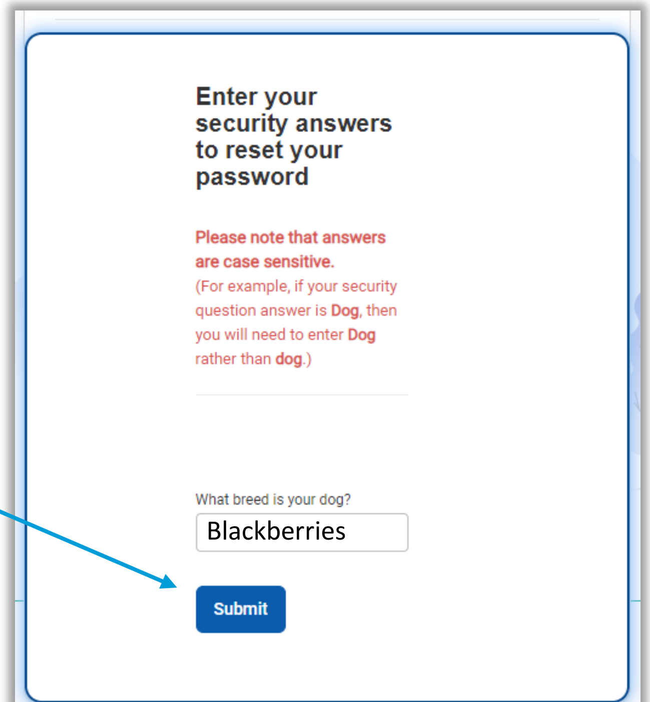
Click on the **Forgot Password or Pin?** link.

Note: If you have not setup your Security Question then you must contact your Navigator to ask that they reset your credentials.

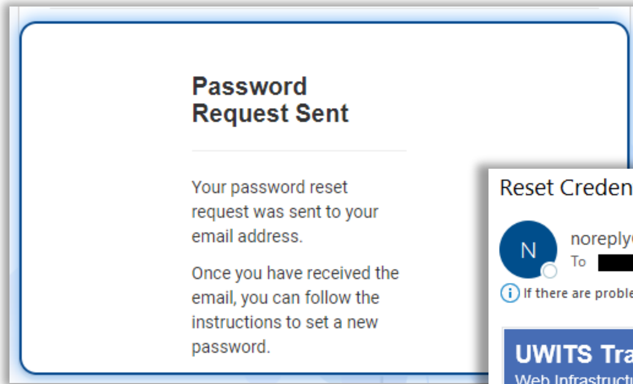


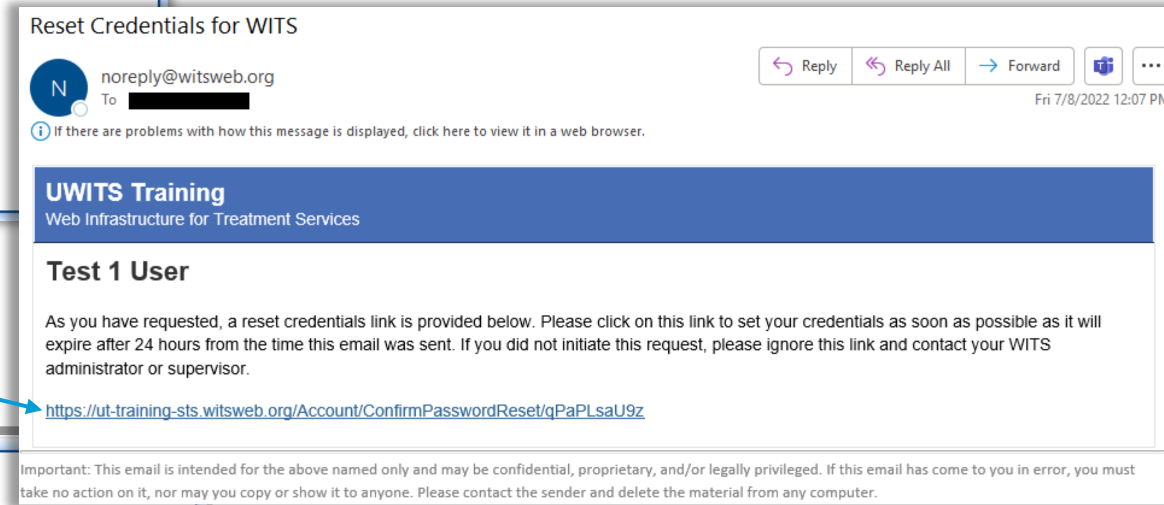
Enter your username and click on the **Submit** button.

Answer the security question then click **Submit**.

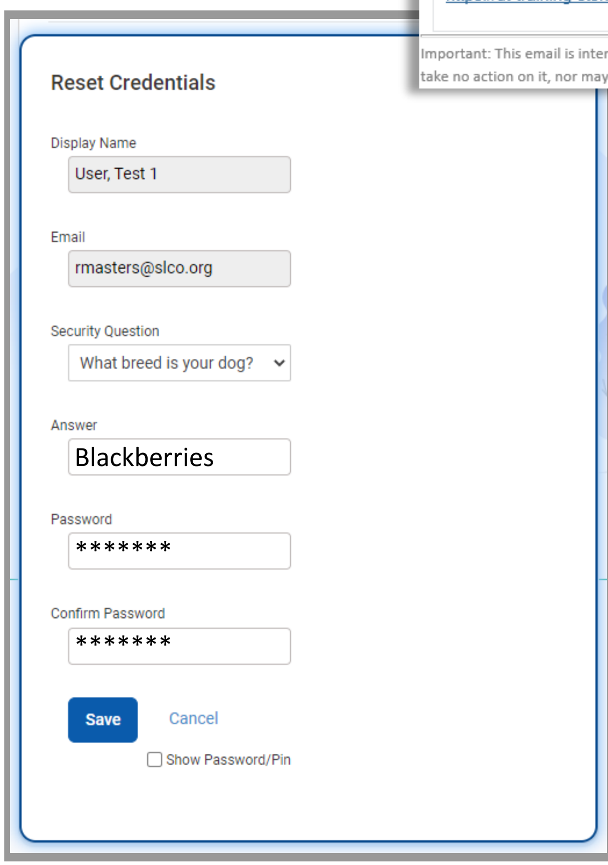


Now check your email. Click on the link in the email to reset your credentials.



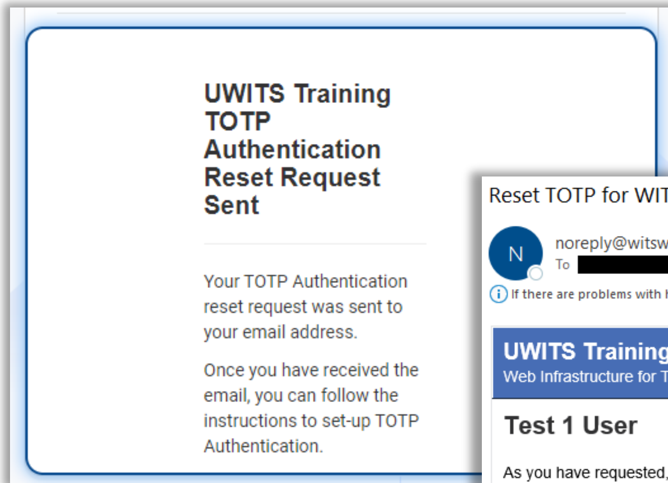


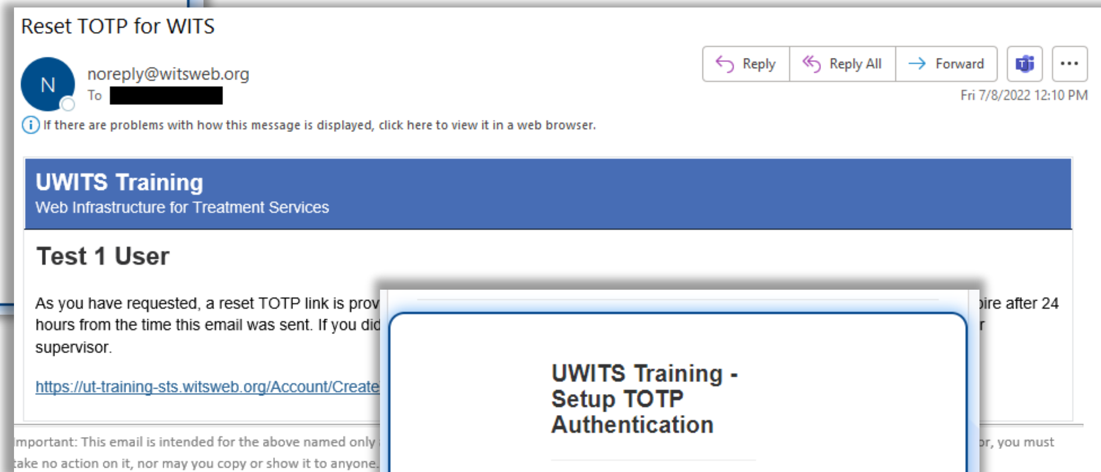
Update your password then click save.



Do you have a new cell phone? Ask your Navigator to click on “Reset TOTP” then start here to setup your new cell phone.

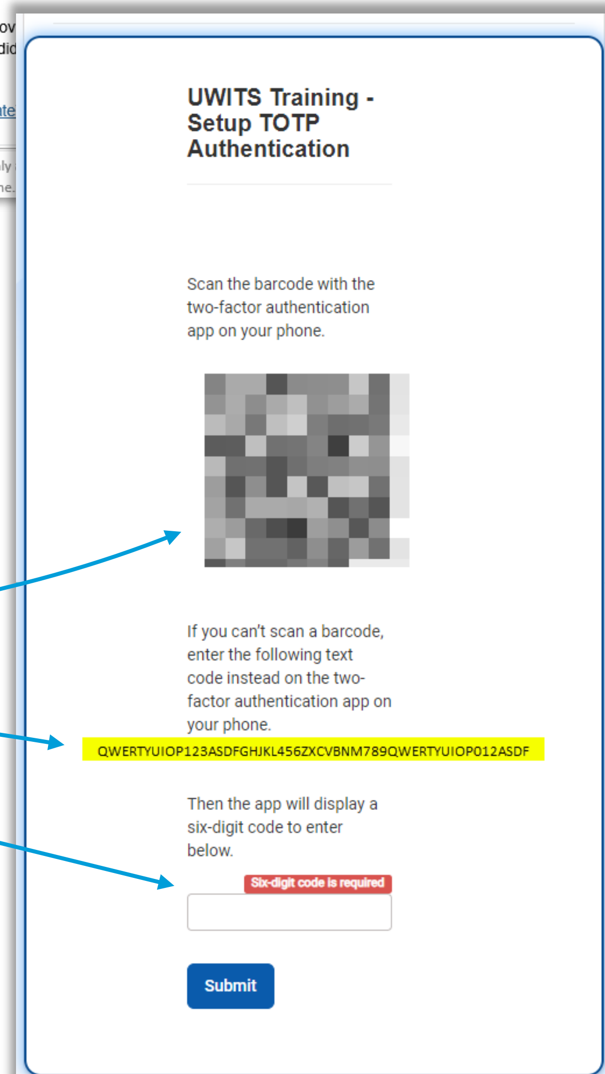
Now check your email again.





Click on the link to setup Multifactor Authentication.

Note: Please see your Navigator for assistance in selecting a TOTP Authenticator app.

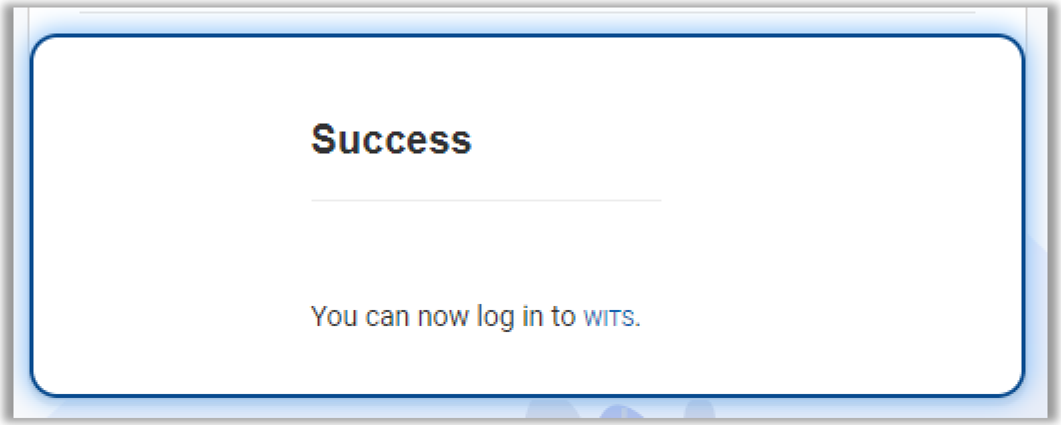


Open your TOTP Authenticator app and prepare to add a new QR Code. The method needed to do this will be different depending upon the app; however, this typically means clicking on a button or link meaning “add” or “new account”.

You may scan the QR Code or use the text code to setup your TOTP Authenticator app.

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

Caution! Do not forget this step!

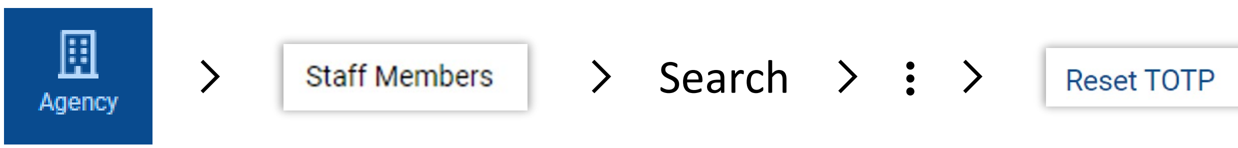


When your TOTP Authenticator app has been setup successfully, the UWITS screen will announce your success.

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

Tip! Save yourself frustration later by clearly labeling the new entry in your TOTP Authenticator app. If the app creates an automatic name then make a point of renaming the entry as needed.

My staff member just bought a new phone. How do we setup their new phone to login to UWITS?



Click on Agency then select the Staff Members module. Search for the staff member. Hover over the action button (⋮) and then click on Reset TOTP. The staff member will receive an email with a link. To see detailed instructions for the remaining steps, start at page 9, above.

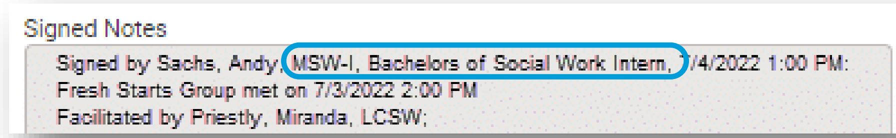
Billing Questions

We sent a batch to the County—but the batch does not appear on the list and the status of the claims still say “Released”. What could be the issue?

Look up each provider in the batch in the Staff Member module to verify that they all have an NPI number entered. Either add the correct NPI number in for any provider without an NPI number or remove them from the batch. Then send the batch again.

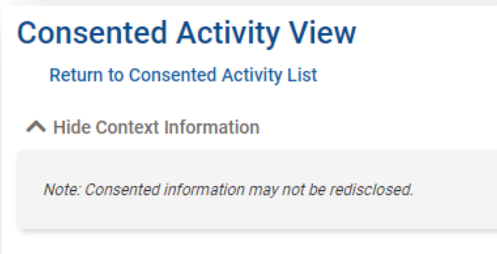
One of our clinicians has double titles in their signature—but one of them is not valid. How does this happen and how do I correct it?

Add an end date to the credential which is no longer valid to remove it.



How can I add an intern with a Bachelor's Degree or a Medical Assistant?

The **Job Title**, **Staff Member Type** and **Professional Qualifications** dropdown boxes in the Staff Member module all include an option labeled Other. When selected, a box appears which allows entry of whatever title, type or qualification is needed.



When I try to look at Consented Activities, all I get is a message that says "Return to Consented Activity List". Why can't I see the details?

Allow pop-ups for the UWITS website in your browser.

When I try to look at a report, the cursor spins but the screen doesn't show the report. Why can't I see the report?

Allow pop-ups for the UWITS website in your browser.

Keeping to one facility within an episode of care

When adding a Client Program Enrollment and the correct program is not listed in the Program Name dropdown box, this usually indicates that the intake was completed at the wrong facility. When it is the first program enrollment for that episode, the correct action is to return to the Intake and update it to the correct facility before enrolling in a program.

There may by exceptions in certain circumstances. If you have any questions please let us know and we'll be happy to work through options with you.

The Authorization for a specific level of care cannot be released. What happened?

Most likely the issue is that the authorization doesn't fall between the start and end date of the funding authorization.

Outcome Measure Questions

What should be entered as Age of First Use of a Substance when the client does not remember?

The label in UWITS at the field for **Age of 1st Use** does mention 97=Unknown, however it is the expectation of the SLCo DBHS Clinical Team that this information should be acquired through the clinical interview process. Please obtain as close to possible the actual age. Entering 97 will be returned as a correction.

Can we reopen an ASAM?

Reopening of an ASAM is not advised and should only be done when there are special circumstances. Consult with the Clinical Team to determine whether special circumstances exist in any specific case. At this time, direct your inquiry to Brian Currie.

What is advised regarding the Marital Status field in the case of a common law marriage?

We accept common law marriage.

When filling in the fields that request the Number of Arrests, what specifically constitutes an Arrest?

A drop-off at Detox (even in handcuffs) is not, by definition, an arrest. The handcuffs could have been for the officer's safety.

Scheduler Questions

Staff listed in the scheduler dropdown after Termination

If a staff member has been terminated, then that staff member should not appear in the scheduler selection box list. Staff members' names will disappear from the Scheduler dropdown list when their Staff Profile Employment End Date is in the past. The staff member will need to have this date removed from their profile in order for them to be shown in the scheduler list again.

There is not currently anything to indicate whether a staff member has been terminated by looking at the scheduler or appointment list – nor for appointments to automatically clear out. In order for the appointments to no longer appear, the logged in user will need to manually reassign or delete the appointments through the Search Calendar screen.

The Calendar screen will not display or displays very slowly

Is this impacting one staff member's Calendar screen or the Calendar screens for multiple staff members? If this is impacting multiple staff members, contact UWITS Support.

If only one staff member is impacted, we need to know whether their Calendar screen is not displaying at all or if it is displaying slowly. Please allow several minutes for the screen to display—perhaps even 10 to 20 minutes. At this point, request assistance from UWITS Support. Please let us know if the screen does or does not display after 20 minutes. When the screen does eventually display, the issue is likely a recurring appointment with an unreasonable start or end date (such as over 100 years from today). Once the number of recurring appointments are reasonable then calendars will load correctly. We will request that the vendor adjust the recurring appointment.

Data Management Questions

What are the areas of concern in the Unfinished Client Activities Report?

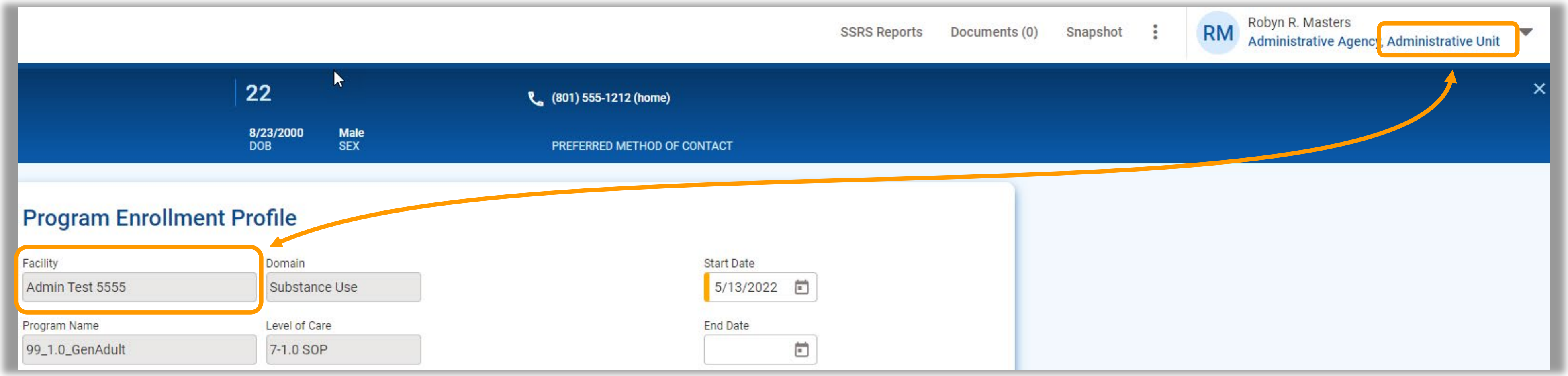
The Unfinished Client Activities identifies items in the Client Profile and Client Activities list which need additional data entry. The Unfinished Client Activities report should be completed for all Salt Lake County data (i.e.: the Outpatient Services facility) but only for these two Selected Activities:

1. **Outcome Measure** – *for Active Open cases in facilities offering Salt Lake County services.*
2. **Client information (profile)** – *for all Case Statuses (not just Open Active cases) in facilities offering Salt Lake County services*

Outcome Measures dated 7/10/2015 (and any before that date) are not necessary to correct due to the data migration at that time. You may, of course, review any and all activities included on this report for your own purposes, but for our purposes the above is sufficient.

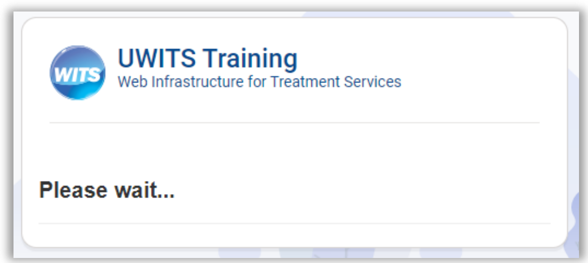
Why can one of my staff see this CPE but another one cannot? They both have the same UWITS Roles.

When a CPE shows a facility which is different than the intake for that episode, staff cannot see the CPE unless they have permission to view both facilities.



This also creates issues at reporting because the facility from the Intake is the one which is reported in connection with each Client Program Enrollment. Unless the facility in the Client Program Enrollment matches the facility from the Intake, reporting will not be correct.

Indeed, CPEs with a different facility than the intake for that episode create so many issues that this is not allowed.



After clicking on the SSRS button, my screen keeps reloading a “Please Wait” screen but nothing happens. How do I get into SSRS?

When this happens, start by clearing your browser’s cache and cookies then close and reopen your browser. Login to UWITS and click on the SSRS button again.

EA Treatment Plan Questions

How do we finalize an EA Treatment Plan after staff signs the plan?

If only one staff member is signing the Treatment Plan, they should **Sign and Finalize**. If they only **Sign** the plan, they will be unable to finalize it. At that point, another staff member must be added to the Treatment Team to **Sign and Finalize**.

From the client's **Activity List**, click on **Tx Team** in the blue Navigation bar to the left. Add an appropriate staff member (with the SignAndFinalizeTreatmentPlan role). The **Review Member** field must be Yes. The staff member can go in and finalize the Treatment Plan.

Can we unsign a Treatment Plan?

No. After the plan has been signed (or signed and finalized) then the plan can no longer be edited. The plan must first be finalized and then either a new review started or a new plan created before it is possible to edit the plan.

Can we unsign an MDA Assessment, a BHA Assessment, and MHA Assessment?

No.

Error Message: MHA Supervisor Signatures Required

Intermittently reported as a bug. MHA shows incomplete and the message is that a Supervisor Signature is needed. However, this error message is not worded well. It actually appears when the clinician has not signed off the MHA themselves.

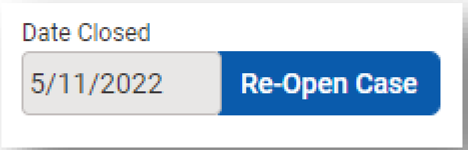
Is there a way for supervisors to be aware that they need to sign off a treatment plan?

Use the Clinical Dashboard to see any that are late. The Next Review Date turns red when past due. The Action button would give you the ability to give clinical feedback.

Discharge Questions

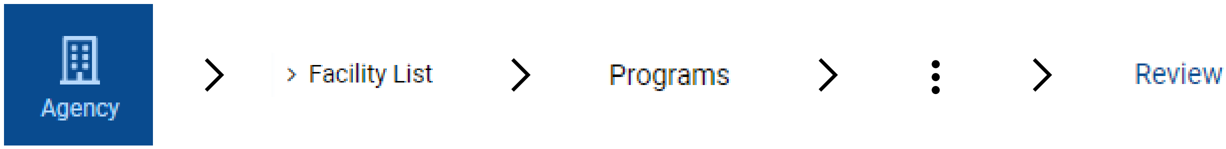
A staff member closed an episode too early. How do I reopen the episode?

Go to the Intake screen and scroll to the bottom of the screen. Click on the **Re-Open Case** button which is to the right of the **Date Closed** field.



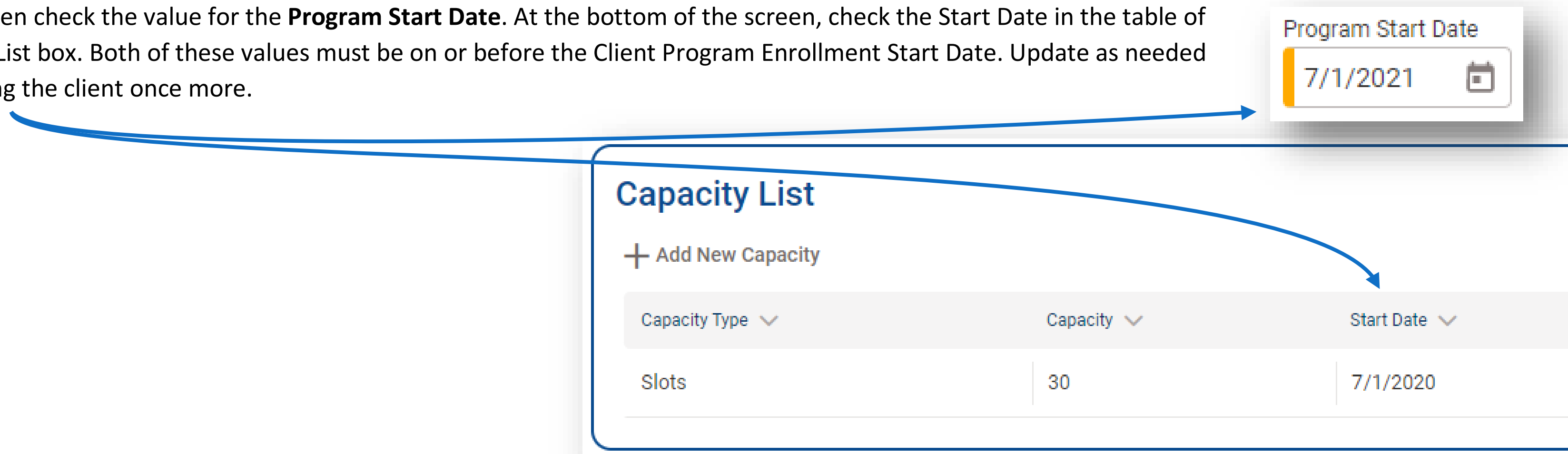
When attempting to discharge a client, we receive an error stating “Program Enrollment start date has to be within (Date)”. We have checked all the dates, but do not see the issue. Any advice?

Yes. Please take a look at the setup of the Program that this client is currently enrolled in:



To do so, click on **Agency**, then **Facility List**. Next, hover over the action button (⋮) for the correct facility and click on the **Programs** option. Find the program this client is enrolled in then hover over the action button (⋮) again and click on **Review**. Note: If you do not see these options then you likely need an additional UWITS permission.

To the right of the screen check the value for the **Program Start Date**. At the bottom of the screen, check the Start Date in the table of values in the Capacity List box. Both of these values must be on or before the Client Program Enrollment Start Date. Update as needed and then try discharging the client once more.



Other Resources Available

Many resources are available on Salt Lake County’s website: https://www.slco.org/behavioral-health/providers/uwits/

In addition to the above, you may request Client ID Corrections documentation or the documentation for the Document Management module at any time.

Responsibilities of the Agency Navigator

Salt Lake County Behavioral Health Services (BHS) WITS Administrators will maintain a list of current Navigators and Backup Navigators with whom all communication should flow. We rely on our Navigator meetings to inform and educate the agency Navigators to known issues, fixes, updates and enhancements.

Here is a brief summary of the responsibilities of the agency Navigator.

Review of roles and expectations of Navigators:

- The Navigator should be a single point of contact (SPOC) that has an overall understanding of the use and functionality of UWITS, as well as an understanding of the contractual requirements of the Salt Lake County (SLCo) BHS contract.
- They are the agency contact for SLCo BHS and should also have a backup staff member to fill-in when they are not available.
- Agencies are more than welcome to utilize more than one person to perform these duties but only one is designated as the SPOC and will be responsible for items described below.

Navigators are Agency Administrators of UWITS and are responsible for the following at their agency:

- Create/modify/end user accounts and roles associated with user's position.
- Troubleshoot any and all issues related to the use of UWITS by their agency users.
- They are the Single Point of Contact (SPOC) for SLCo WITS Administrators and will communicate any issues encountered with or from usage of the UWITS system to SLCo WITS Administrators in a timely manner.
- Attend and participate in all UWITS Navigator meetings at SLCo.
- Disseminate any information from SLCo regarding UWITS to all pertinent agency users.
- Train any agency staff in UWITS use relative to the user's position and roles in accordance with their agency's operations.
- Receive, coordinate and report status on all data correction requests from SLCo.

Navigators (and Agencies) should NOT do these:

- Agencies should not create their own facilities.
- Agencies should not create their own programs.

Please email uwitssupport@slco.org for assistance. We prefer to help you so that all agency and SLCo BHS objectives are met.

Navigators and Other Relevant Meetings

- Navigators Meeting is held monthly on the 3rd Friday of each month at 10:00 am
- Billing Meeting is held quarterly on the 3rd Friday of each month at 9:00 am

These meetings will be canceled anytime there is not sufficient content. Request an invitation to any of the above meetings by emailing the UWITS Support box.

Data Quality and Data Corrections

Unfinished Client Activities Report

Regular usage of this report can identify issues with agency data before they cause additional complications. Primary focus should be on: (1) Active Open cases in facilities offering Salt Lake County services and (b) Client Profiles (with both open and closed episodes).

UWITS Data Correction Requests

Data correction requests may be sent periodically by WITS Administrators via encrypted email. It is expected that you will address each issue and respond indicating what correction was applied.

Appendix: UWITS User Roles and Descriptions

Highlighting: Clinical (Full Access)

Please note that the Clinical (Full Access) Role inherits quite a lengthy list of additional Roles. (The grayed-out roles are relevant to modules which are not in UWITS.)

Admission (Full Access)
Admission (Read-Only)
Agency Waitlist (Full Access)
Agency Waitlist (Read-Only)
ASAM List Access
ASAM Profile (Full Access)
Assessments (Full Access)
Assessments (Read-Only)
Client Dashboard
View Encounter Notes
Client Diagnosis (Read-Only)
Client Module Client Record
Dashboard View Assessments
Client Payments (Full Access)
Client Program Enrollment (Full Access)
Client Record Dashboard Add Assessment
Client Record Dashboard Add Encounter Notes
Client Record Dashboard Add Medications
Client Record Dashboard View Diagnosis
Client Record Dashboard
View Medications
ClientProfile (Full Access)
ClientProfile (Read-Only)
Clinical
Clinical (Full Access)
Clinical (Read-Only)
Consent (Full Access)
Consent (Read-Only)
Contact (Full Access)
Contact (Read-Only)
Discharge (Full Access)
Discharge (Read-Only)
Edit Client
Edit Client Consent
Edit Notes
Edit Referral
GPRA (Full Access)
GPRA (Read-Only)
Intake (Full Access)
Intake (Read-Only)
Non-Treatment Team Access
Notes (Full Access)
Notes (Read-Only)
Outcome Measures (Full Access)
Outcome Measures View
Outcomes (Full Access)
Outcomes (Read-Only)
Placement (Full Access)
Placement (Read-Only)
Recovery Plan (Full Access)
Recovery Plan (Read Only)
Referrals (Full Access)
Referrals (Read-Only)
Release Plan (Full Access)
Release Plan (Read-only)
Screening (Full Access)
Screening (Read-Only)
Treatment Plan Full Access
TxEncounter (Full Access)
TxEncounter (Read-Only)
TxMedications (Full Access)
TxMedications (Read-Only)
TxPlan (Full Access)
TxPlan (Read-Only)
View Client Consent
View Client Dashboard
View Client List
View Completion Requirements
View Link Client Consent
View Referral
View Treatment Plan

User Roles and Descriptions

Admission (Full Access)
Full access to all options under Client List/Activity List/Admission.

Admission (Read-Only)
Read-Only access to all options under Client List/Activity List/Admission.

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.

Agency Billing
Full access to the Agency Billing screens under Agency/Billing.

Agency Events (Full Access)
This role will give the user the ability to enter not client specific Events at the Agency level.

Agency Events (Read-only)
This role will give the user the ability to access Events at the Agency level in read only mode.

Agency H835 Management
Allows access to the Agency H835 Management screen.

Agency H999 Management
Allows access to the Agency H999 Management screen.

Agency Invoicing (Full Access)
Full access to the Invoicing screens used for Cost Reimbursement and located under Agency Billing.

Agency Invoicing (Read-Only)
Read-Only access to the Invoicing screens used for Cost Reimbursement and located under Agency Billing.

Agency Reporting
Access and run agency-wide reports under the Reports. This role also gives access to the Unfinished Client Activity and Client list by Program report.

Agency Waitlist (Full Access)
Full access to all options under Client List/Activity List/WaitList.

Agency Waitlist (Read-Only)
Read-Only access to all options under Client List/Activity List/WaitList.

ASAM Profile (Full Access)
Grants full access to the ASAM Profile screen.

Assessments (Full Access)
Full access to all options under Client List/Activity List/Assessments.

Assessments (Read-Only)
Read-Only access to all options under Client List/Activity List/Assessments.

Assessments Delete
Ability to delete certain assessments (**DENS** and **ADAD**) under Client List/Activity list/Assessments.

Audit Report
Allows a user to generate an audit log.

Authorization (Full Access)
Full access to Authorization (Voucher) on Client List/Activity List/Authorization (Voucher).

Authorization (Read-Only)
Read-Only access to Authorization (Voucher) on Client List/Activity List/Authorization (Voucher).

Authorization (Restricted Access)
User has access to add/edit authorization (voucher) but cannot change the number of units when adding a service to the authorization (voucher).

Billing Encounter List
Allow user to access the Encounter List screen under Agency/Billing.

Can Associate/Dissociate Agency Account
Can Associate/Dissociate Agency Account

Can Grant/Revoke Agency Billing
Can Grant/Revoke Agency Billing

Can Grant/Revoke Agency Invoicing Full
Can Grant/Revoke Agency Invoicing Full

Can Grant/Revoke Agency Invoicing View
Can Grant/Revoke Agency Invoicing View

Can Grant/Revoke Billing Tx Encounter List
Can Grant/Revoke Billing Tx Encounter List

Can Grant/Revoke Can Access ASAM List
Can Grant/Revoke Can Access ASAM List

Can Grant/Revoke Client Payment Full
Can Grant/Revoke Client Payment Full

Can Grant/Revoke Client Voucher Signoff
Can Grant/Revoke Client Voucher Signoff

Can Grant/Revoke Contract Management Full
Can Grant/Revoke Contract Management Full

Can Grant/Revoke Contract Management No Adjustments
Can Grant/Revoke Contract Management No Adjustments

Can Grant/Revoke Contract Management View
Can Grant/Revoke Contract Management View

Can Grant/Revoke Create Claim Batch
Can Grant/Revoke Create Claim Batch

Can Grant/Revoke Cross Agency Waitlist Management
Can Grant/Revoke Cross Agency Waitlist Management

Can Grant/Revoke Drug Test Process Errors
Can Grant/Revoke Drug Test Process Errors

Can Grant/Revoke Gambling Crisis
Can Grant/Revoke Gambling Crisis

Can Grant/Revoke Program Set Up
Can Grant/Revoke Program Set Up

Can Grant/Revoke Rate View
Can Grant/Revoke Rate View

Can Grant/Revoke Record Management
Can Grant/Revoke Record Management

Can Grant/Revoke Service View
Can Grant/Revoke Service View

Can Grant/Revoke Support Ticket
Can Grant/Revoke Support Ticket

Can Grant/Revoke Support Ticket Agency User
Can Grant/Revoke Support Ticket Agency User

Can Grant/Revoke Unique Client Eligibility
Can Grant/Revoke Unique Client Eligibility

Can Grant/Revoke Universal Referral
Can Grant/Revoke Universal Referral

Can Grant/Revoke Vendor Management
Can Grant/Revoke Vendor Management

Case ReOpen
Allow the user to re-open a closed case on Client List/Activity List/Intake screen.

Client Confidential
Access to the Client Confidential screen under Client List/Client Profile/Confidential.

Client Diagnosis (Full Access)
Full access to the Diagnosis fields on Client Diagnosis screens under Client List/Activity List/Assessments/Diagnosis, Admission/Diagnosis, or Treatment/Tx Plan/Diagnosis.

Client Diagnosis (Read-Only)
This role provides read-only access to the Client-Diagnosis screen.

Client External History (Full Access)
Full access to Client External History.

Client External History (Read-Only)
Read-Only access to Client External History.

Client Payments (Full Access)
Allows user to add a new payment under Activity List/Payment

ClientProfile (Full Access)
Full access to all options under Client List/Client Profile.

ClientProfile (Read-Only)
Read-Only access to all options under Client List/Client Profile.

Clinical (Full Access)
Full access to all clinical options under the Client List/Activity List. View included roles (Highlighted above.)

Clinical (Read-Only)
Read-Only access to all clinical options under the Client List/Activity list.

Clinical Dashboard Oversight
Provide access to query all staff of an agency on the Clinical Dashboard, giving permission to select any staff in the list and allow to see all clients' cases associated with selected staff member(s).

Clinical Full (without Non-Tx Team)
Full access to all clinical options under the Client List/Activity list except Non Treatment Team Access.

Clinical Supervisor
This role allows the user to manage the Clients with Consents from Outside Agencies list and to manage linked Consents. This role can sign off on TX Review on behalf of other TX Review team members. In Hawaii, the role expands the Clinical (full) role to allow access across Programs (Program restriction on the Clinical (full) role only exists in Hawaii).

Complete MHA
A user with this role Completes and signs off on the MHA. Users that do not have this role, can Complete the MHA, but is it considered unsigned.

Consent (Delete)
Allows the user to delete unsigned Client Consents subject to the business rules in place.

Consent (Full Access)
Full access to all options under Client List/Activity List/Consent.

Consent (Read-Only)
Read-Only access to all options under Client List/Activity List/Consent.

Contract Management (Full Access)
Full access to all contracts screens under Agency/Contract Management.

Contract Management (Read-Only)
Read-only access to contract management under Agency/Contract Management but without access to adjustments of on Contract Management/Contract List/Authorization Period/Tiers/Adjust link.

Contract Management (without adjustments)
Full access to contract management under Agency/Contract Management but without access to adjustments of on Contract Management/Contract List/Authorization Period/Tiers/Adjust link.

CPOE
Allows orders for lab/radiology to be made and modified.

Create Agency Accounts
Can create Agency Accounts.

Create Agency Claim Batch
Create Provider Claim Batches by Agency by the Create Batches link on the Agency/Billing/Claim Item List screen.

Create Facility Claim Batches
Create Claim Batches by Facility by the Create Batches link on Agency/Billing/Claim Item List screen

Create Scheduler Encounter
The role allows a user to create or view an encounter for scheduled appointments from the Appointment Search screen.

Create Staff Members
Can create Staff Members.

Discharge (Full Access)
Full access to all options under Client List/Activity List/Discharge.

Discharge (Read-Only)
Read-Only access to all options under Client List/Activity List/Discharge.

Document Management (Delete)
Ability to delete Document Management documents.

Document Management (Full Access)
Provides full (read/write) access to Document Management functionality.

Document Management (Read-Only)
Provides full access to Document Management functionality.

Document Management Administrative Controls (Full-Access)
This role provides full access to the ‘Document Storage Administrative Controls’� screen under the System Administration menu.

Document Management Administrative Controls (Read-Only)
Provides read-only access to the ‘Document Storage Administrative Controls’™ screen under the System Administration menu.

Document Management Storage Allocation
This role provides access to the read-only ‘Document Management Storage Allocation’™ screen under the System Administration menu. From this screen, users can view the total Document Storage space allocation and usage for the context agency.

Edit Staff Member Facility Assignments
Can edit Staff Member facility assignments.

Edit Staff Members
Can edit Staff Members.

Encounter (Delete)
Enable user to delete the encounter under Client List/Activity List.

ePrescribing
Allows medication orders through interface with New Crop

Facility Administrator
This role should be assigned to the person in charge of setting up and updating facilities within the Agency (Facility Profile, Contacts, Operating Hours, Programs, etc.). This role gives access to all sub-menus under the Agency/Facility List, as well as Group Notes and the Reports section.

Grant/Revoke Roles Agency Accounts
Grant/Revoke roles to Agency Accounts.

Group Notes (Full Access)
Enables the 'Add Group' link on the Group List screen.

Group Notes (Read-Only)
This role gives the user the ability to access the Group Notes menu items, view only groups, view the roster and view group sessions.

Group Notes (Restricted Access)
This role gives the user the ability to access the Group Notes menu items, edit groups, add clients to the roster, create and edit group sessions. However, it does not give the ability to add a new group.

Human Resources (Full Access)
Full Access to Staff Profile, Contact Info, Staff Language, Staff Qualifications, Staff System Usage, and Staff-Plan Profile and the ability to Create Accounts.

Human Resources (Read-Only)
Read-Only Access to Staff Profile, Contact Info, Staff Language, Staff Qualifications, Staff System Usage, and Staff-Plan Profile and basic Account Information.

Intake (Full Access)
Full access to all options under Client List/Activity List/Intake.

Intake (Read-Only)
Read-Only access to all options under Client List/Activity List/Intake.

Invoice Attestation
The role allows user to sign a cost reimbursement invoice and record the attestation statement to be displayed on the printed invoice.

Link Consents
The role allows a user to link clients on the 'Linked Consents' screen under client.

Lock/Unlock Agency Accounts
Lock/Unlock Agency Accounts.

Manage Staff Schedules
Ability to manage the schedules for all staff in user's agency from Home page.

Manage Treatment Team Groups
This role gives the user access to the Tx Team Groups Menu item under Agency. It allows the user to create treatment team groups and add staff members to them.

Non-Treatment Team Access
This role allows access to cases without being a member of the clients treatment team. By default, you can only access case records if you are a member of the treatment team.

Notes (Delete)
User can delete the note on Client List/Activity list/Notes/Misc.Notes.

Notes (Full Access)
Full access to all options under Client List/Activity list/Notes.

Notes (Read-Only)
Read-Only access to all options under Client List/Activity list/Notes.

Outcome Measures (Full Access)
Full access to all screens under the Outcome Measures menu.

Outcome Measures View
View all screens under the Outcome Measures menu.

Outcomes (Full Access)
Full access to all options under Client List/Activity list/Outcomes.

Outcomes (Read-Only)
Read-Only access to all options under Client List/Activity list/Outcomes.

Payor Adjudication
Full access to all functionality under Payor Adjudication for their agency.

Program Set Up
The role provides read/write access to the Program Set Up screen under the Facility menu item. User with this role may set up and edit programs within a facility.

Rate (Read-Only)
Read-Only access to Agency Rate Profile on System Administration/Rates screen

Record Management
Allow the transfer of an episode and all related data between clients, and the ability to delete a client.

Referrals (Full Access)
Full access to all options under Client List/Activity list/Referrals.

Referrals (Read-Only)
Read-Only access to all options under Client List/Activity list/Referrals.

Release To Billing
Allows user to release encounters to Billing by the Release To Billing action link on the Encounter Profile screen.

Reports Access
This role gives the user access to the Reports section of the menu tree.

Reset Logon
The role allows the user to reset credentials, enable and lock/unlock accounts.

Screening (Full Access)
Full access to all options under Client List/Activity list/Screening.

Screening (Read-Only)
Read-Only access to all options under Client List/Activity list/Screening.

Search All Client Documents
This role allows the user to access the 'Document Storage Client Search'� screen. Users with this role will have the ability to see ALL client episodes within an agency and any Document Storage files associated with the episode. If applicable, the results on this screen will be filtered based on Access Categories and Treatment Team.

SignOff Treatment Plan
Sign Off on a Treatment Plan

SignOffAndFinalizeTreatmentPlan
Sign off and finalize a treatment plan

Staff Administrator
This role should be assigned to the person in charge of administering staff within an agency. In order to create new staff records, and / or modify system access of existing ones. This role gives access to all of the staff within an agency and all of the sub-menus under the Agency/Staff List menu.

Staff Management (Full Access)
Full Access to Staff Assignment and Staff System Access (on Account Information screen) under Agency/Staff List.

Staff Management (Read-Only)
Read-Only Access to Staff Assignment and Staff System Access (on Account Information screen)under Agency/Staff List.

Support Ticket Administrator (Agency)
This role allows user to create Support Tickets and submit them to the WITS Administrator.

Support Ticket User (Agency)
The role gives a user access to all support tickets from their own agency, but will not allow the user to send a support ticket to the WITS Administrator.

Treatment Plan Full Access
Treatment Plan (Full Access)

TxEncounter (Full Access)
Full access to all options under Client List/Activity List/Encounter.

TxEncounter (Read-Only)
Read-Only access to all options under Client List/Activity List/Encounter.

TxMedications (Full Access)
Full access to all options under Client List/Activity List/Treatment/Medications.

TxMedications (Read-Only)
Read-Only access to all options under Client List/Activity List/Treatment/Medications.

TxPlan (Full Access)
Full access to all options under Client List/Activity List/Treatment/TxPlan.

TxPlan (Read-Only)
Read-Only access to all options under Client List/Activity List/Treatment/TxPlan.

Unique Client Eligibility
Access to Client List/Client Profile/Unique Client Eligibility screen.

View Client Documents By Episode
This role provides access to the ‘Document Storage Usage per Episode’ screen under the ‘Client Profile’ menu. Within the context of a client, users can view a list of all episodes and any associated Document Storage files as well as the number of files and amount of space used per episode.

View Client Documents Usage Details
This role gives users the ability to access the overlay with detailed document information from the ‘Document Client Search’ and ‘Document Storage Usage per Episode’ screens.

View Completion Requirements
View Completion Requirements.

View Confidential Staff Member Identifiers
Can view staff member identifiers that have been marked as confidential.

View Consented Clients
The role allows the user to view clients with Consents on the Client List.

View History
Can view history of records in system.

View Needs Assessment
Can view a Needs Assessment.

View Scheduler
View Scheduler.

View Staff Member Facility Assignments
Can view the Staff Member Facility Assignments Panel.

View Staff Members
Can access the Staff Member List and Workspace Screens.

View Staff Members List
Can access the Staff Member List Screen.

View Treatment Plan
View Treatment Plan

Vital Signs (Full Access)
Full access to Vital Signs.

Vital Signs (Read-Only)
Read-Only access to Vital Signs.