

# Adding New Agency Staff/Resetting Passwords

Created: 8/3/2015

- Step 1: Click on "Agency"
- Step 2: Click on "Staff List"
- Step 3: Click the "Add New Agency Staff Record" link

17.24.0

**WITS Maine-WITS Training** Logout

User: Buzzell, Johanna | Location: Substance Abuse and Mental Health Services Snapshot

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Home Page

Waitlist

Agency

Agency List

Facility List

Staff List

Staff Profile

### Agency Staff Search

Agency: Training Agency A

First Name:

User ID:

Staff Active Indicator: Active

Last Name:

Clear Go

**3**

[Add New Agency Staff Record](#)

Step 4: Fill in all yellow fields then click "save"

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**WITS Maine-WITS Training**

User: Buzzell, Johanna | Location: Training Agency A, Training Facility A

Home Page

State Waitlist

Agency

Agency List

Facility List

Staff List

Staff Profile

Contact Info

Staff Assignment

Staff Language

Staff Qualifications

Account Information

Staff System Usage

Staff-Plan Profile

Tx Team Groups

Non-Staff Physicians

System Usage

Alerts Configuration

Group List

### Staff Profile

First Name  Middle  Last

Prof. Credentials  Gender  DOB

Taxonomy

Category

Sub-Category

Specialty

Email

Social Security

National Provider ID

Title

Start Date  End Date

Dev Plan Date  Perf Rev

Last TB Test Date

Policies & Procedures Manual Reviewed?

Required Background Checks Completed?

Staff Type

Clinical Supervisor

Manager Name

Employment Type

Comments

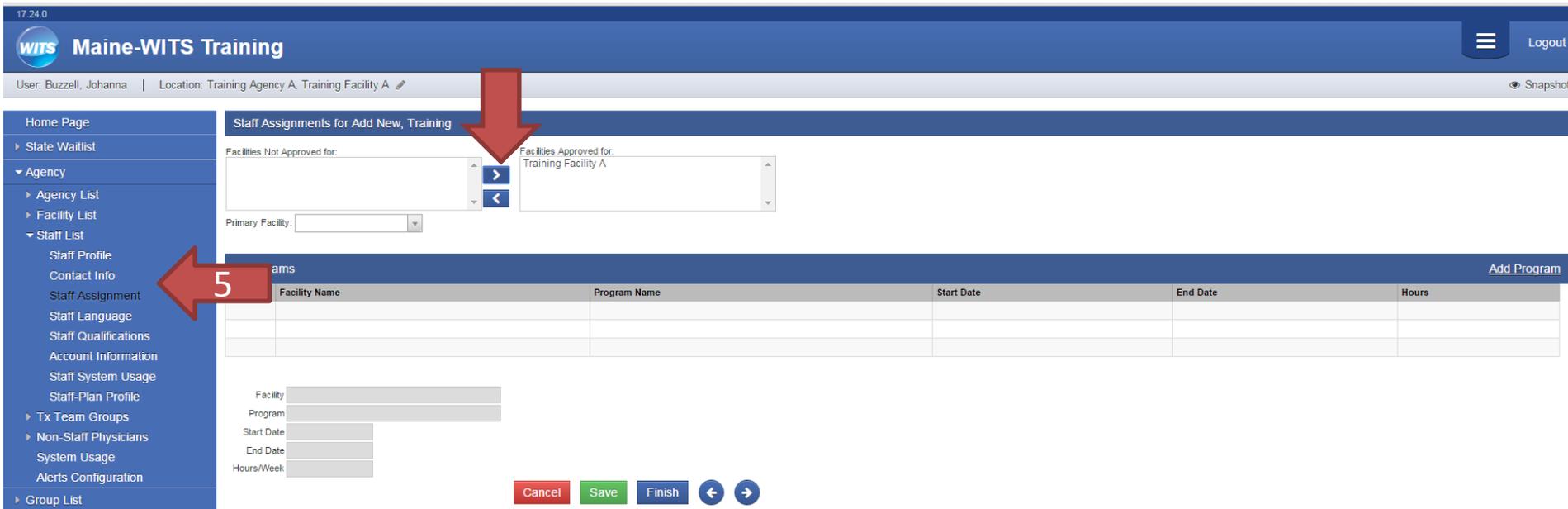
Background Check Outcomes Acceptable?

Last Performance Appraisal Process Participation?

Cancel Save Finish

**Step 5:** Click on “Staff Assignment” in the blue column on the left.

**Step 6:** Select the facility/facilities that the new staff member will need access to (to select multiple hold “ctrl” and click multiple) and click  to move the facility over to the “Approved” box then click “save”



The screenshot shows the WITS Maine-WITS Training interface. The top navigation bar includes the WITS logo, the text "Maine-WITS Training", and a "Logout" button. Below the navigation bar, the user information "User: Buzzell, Johanna" and the location "Location: Training Agency A, Training Facility A" are displayed. The main content area is titled "Staff Assignments for Add New, Training". It features two lists of facilities: "Facilities Not Approved for:" and "Facilities Approved for:". The "Facilities Approved for:" list contains "Training Facility A". A red arrow points to the right arrow button between the two lists. Below these lists is a "Primary Facility:" dropdown menu. A table with columns "Facility Name", "Program Name", "Start Date", "End Date", and "Hours" is shown. A red arrow with the number "5" points to the "Staff Assignment" link in the left sidebar. At the bottom, there are "Cancel", "Save", "Finish", and navigation buttons.

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**WITS** Maine-WITS Training Logout

User: Buzzell, Johanna | Location: Training Agency A, Training Facility A Snapshot

Home Page

- State Waitlist
- Agency
  - Agency List
  - Facility List
  - Staff List
    - Staff Profile
    - Contact Info
    - Staff Assignment **5**
    - Staff Language
    - Staff Qualifications
    - Account Information
    - Staff System Usage
    - Staff-Plan Profile
  - Tx Team Groups
  - Non-Staff Physicians
  - System Usage
  - Alerts Configuration
- Group List

Staff Assignments for Add New, Training

Facilities Not Approved for:

Facilities Approved for:  
Training Facility A

Primary Facility:

Facility Name	Program Name	Start Date	End Date	Hours

Facility

Program

Start Date

End Date

Hours/Week

Cancel Save Finish  

[Add Program](#)

**Step 7:** Click “Account Information” in the blue column on the left

**Step 8:** Create User Login ID. (this will be the first initial and last name of the staff member.)

**Step 9:** Click “Create Account” link under “Administrative Actions”

**\*\*An email from “noreplywits” will be sent to the staff person with their login information.\*\***

The screenshot displays the 'Maine-WITS Training' web application. The top navigation bar includes the WITS logo and the text 'Maine-WITS Training'. Below this, a user profile bar shows 'User: Buzzell, Johanna' and 'Location: Training Agency A, Training Facility A'. A blue notification banner at the top of the main content area states 'Login for 'taddnew' has been removed.' The left sidebar contains a menu with categories: Home Page, State Waitlist, Agency (with sub-items: Agency List, Facility List, Staff List), Tx Team Groups, Non-Staff Physicians, System Usage, Alerts Configuration, Group List, Clinical Dashboard, Client List, System Administration, My Settings, Reports, and Support Ticket. The 'Account Information' link under the Staff List is highlighted with a red arrow labeled '7'. The main content area is divided into several sections: 'User Information' (with fields for First Name, Last Name, Manager Name, Staff Type, Title, and Employment Type), 'Role Descriptions', 'System Access' (with Job Function Roles and Role Attributes), and 'Administrative Actions' (with a 'Create Account' link highlighted by a red arrow labeled '9'). A red arrow labeled '8' points to the 'User Login ID' field, which contains the text 'taddnew'. At the bottom of the page, there are three buttons: 'Cancel' (red), 'Save' (green), and 'Finish' (blue), along with a back arrow icon.

**Step 10:** Add the appropriate rolls for the new user by clicking on the rolls in the “Job Function” box and moving them over to the “Assigned” box. (Roll descriptions explained on next page.) Then click “Finish”

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**WITS** Maine-WITS Training

User: Buzzell, Johanna | Location: Training Agency A, Training Facility A

Home Page

- State Waitlist
- Agency
  - Agency List
  - Facility List
  - Staff List
    - Staff Profile
    - Contact Info
    - Staff Assignment
    - Staff Language
    - Staff Qualifications
    - Account Information
    - Staff System Usage
    - Staff-Plan Profile
  - Tx Team Groups
  - Non-Staff Physicians
  - System Usage
  - Alerts Configuration
- Group List
- Clinical Dashboard
- Client List
- System Administration
- My Settings
- Reports
- Support Ticket

**User Information**

First: Training Last: Add New

Manager Name: 001, Training Staff Type: Agency Staff

Title: Employment Type:

User Login ID: taddnew User Email: training@maine.gov

**Role Descriptions**

**System Access**

Job Function Roles

- Agency Administrator
- Agency Reporting
- Assessments Delete

Assigned Job Function Roles

- Clinical (Full Access)
- Clinical (Read-Only)

Role Attributes

- Agency Events (Full Access)
- Agency Events (Read-only)
- Agency Full Access
- Audit Report

Assigned Role Attributes

- Admission (Full Access)
- Admission (Read-Only)
- Assessments (Full Access)
- Assessments (Read-Only)

Support Ticket Notification

Allowed Emergency Access? Emergency Login ID:

**Administrative Actions**

[Remove Account](#) [Reset Credentials](#) [Disable Account](#) [Expire Credentials](#)

Cancel Save Finish

# Roll Descriptions

Roles	Description of the Role	Comments
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. Should only give 1 or 2 people this level of access in an agency.	This role also enables signing off approval of Tx Review for other team members, unlocking AST/CSR, and deleting CSR and Discharge. Facility Administrator must also be assigned for access to facility screens.
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 or Read Only)	Full access to all options under Client List/Activity List/Wait list	
Audit Report	Allows a user to generate an audit log	
Client Profile (Full Access)	Full access to all options under Client List/Client Profile.	
Client Profile (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. [many other roles are included with this, including Medications screen, Encounter screen, etc.)	This is usually for clinical staff; this includes the role attributes of Admission (Full Access) and Client Profile. Access to all client records and overrides in the agency. This also include the Consent Role
Clinical Full (w/out Non Tx Team Access)	Full access to all clinical options under the Client List/Activity list except Non Treatment Team Access.	All client records are hidden except those where s/he is on the Treatment Team of the client.
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.	This enables signing off approval of a Treatment Review for other team members
Consent (Full Access)	Full access to all options under Client List/Activity List/Consent.	Automatic if assigned clinical access role
Consent (Delete)	Allows the user to delete unsigned Client Consents subject to the business rules in place.	
Cross-Agency waitlist Management	Allows access to the Cross-Agency waitlist menu items and screens. User can create new records and edit existing ones.	
Discharge (Full Access)	Full access to all options under Client List/Activity List/Discharge.	Automatic if assigned clinical access role
Encounter (Delete)	Enable user to delete the encounter under Client List/Activity List/Notes/Encounters/Profile	This is in an Administrative Actions link that appears only for staff assigned this role. It appears once a note is saved.
Group Notes - Add Group	Enables the "Add Group" link on the Group List Screen	
Human Resources	Full Access to Staff Profile, Staff Addresses, Staff Language, Staff Qualifications, Staff Account, and Staff Plan Profile under Agency/Staff List.	This role acitvates HR related screens.
Intake (Full Access)	Full access to all options under Client List/Activity List/Intake.	Automatic if assigned clinical access role
Intake (Read Only)	Read-Only access to all options under Client List/Activity List/Intake.	Automatic if assigned clinical access role
Reports Access	This role gives the user access to the Reports section of the menu tree	

## Agency Administrator

An “Agency Administrator” needing **Full Access** will need the following rolls:

- Agency Administrator
- Clinical Full Access
- Clinical Supervisor
- Cross-Agency Waitlist Management (Full Access)
- Facility Administrator
- Staff Administrator

# Resetting/Unlocking Accounts

- **Step 1:** Bring up your staff list (Agency→Staff List→"Go") You should see a screen resembling the one below with your staff listed.

The screenshot displays the 'Maine-WITS Training' web application interface. At the top, the header includes the WITS logo, the text 'Maine-WITS Training', and a 'Logout' button. Below the header, the user information shows 'User: Buzzell, Johanna' and 'Location: Training Agency A, Training Facility A'. A left-hand navigation menu lists various options, with 'Staff List' expanded to show 'Staff Profile', 'Contact Info', 'Staff Assignment', 'Staff Language', 'Staff Qualifications', 'Account Information', 'Staff System Usage', 'Staff-Plan Profile', 'Tx Team Groups', and 'Non-Staff Physicians'. The main content area is titled 'Agency Staff Search' and contains a search form with fields for 'Agency' (set to 'Training Agency A'), 'First Name', 'User ID', 'Staff Active Indicator' (set to 'Active'), and 'Last Name'. There are 'Clear' and 'Go' buttons at the bottom right of the search form. Below the search form is the 'Agency Staff List' table, which includes a link to 'Add New Agency Staff Record'. The table has columns for 'Reset Logon', 'Actions', 'Last Name', 'First Name', 'Agency', 'Email', 'Has System Access', and '# Days Since Last Login'. The table contains six rows of staff data.

Reset Logon	Actions	Last Name	First Name	Agency	Email	Has System Access	# Days Since Last Login
		001	Training	Training Agency A	Training.001@maine.gov	No	
		002	Training	Training Agency A	Training.002@maine.gov	Yes	110
		003	Training	Training Agency A	Training.003@maine.gov	Yes	146
		004	Training	Training Agency A	Training.004@maine.gov	Yes	147
		005	Training	Training Agency A	Training.005@maine.gov	Yes	60
		006	Training	Training Agency A	Training.006@maine.gov	Yes	49

**Step 2:** Hover over the pencil under the “Reset Login” column and click the “Enable Account” or “Reset Credentials” link.

Agency Staff List <span style="float: right;"><a href="#">Add New Agency Staff Record</a></span>							
Reset Logon	Actions	Last Name	First Name	Agency	Email	Has System Access	# Days Since Last Login
		001	Training	Training Agency A	Training.001@maine.gov	No	
		002	Training	Training Agency A	Training.002@maine.gov	Yes	110
		003	Training	Training Agency A	Training.003@maine.gov	Yes	146
		004	Training	Training Agency A	Training.004@maine.gov	Yes	147

Agency Staff List <span style="float: right;"><a href="#">Add New Agency Staff Record</a></span>							
Reset Logon	Actions	Last Name	First Name	Agency	Email	Has System Access	# Days Since Last Login
		001	Training	Training Agency A	Training.001@maine.gov	Yes	147
		002	Training	Training Agency A	Training.002@maine.gov	Yes	110
		003	Training	Training Agency A	Training.003@maine.gov	Yes	146
		004	Training	Training Agency A	Training.004@maine.gov	Yes	147

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**Maine-WITS Training**

User: Buzzell, Johanna | Location: Training Agency A, Training Facility A

Home Page

▸ State Waitlist

▾ Agency

▸ Agency List

**Are you sure you want to reset the credentials? (This will change the user's password and PIN.)**

## Still Need Help?

- Please feel free to contact [johanna.buzzell@maine.gov](mailto:johanna.buzzell@maine.gov) with any questions you may have.