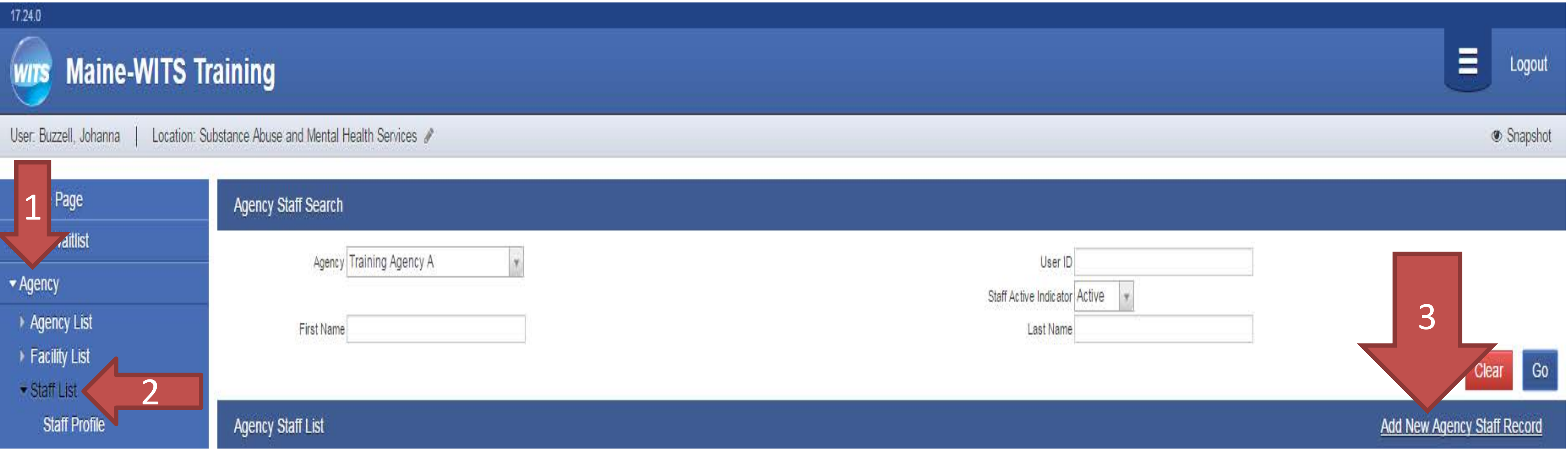
Adding New Agency Staff/Resetting Passwords

Created: 8/3/2015

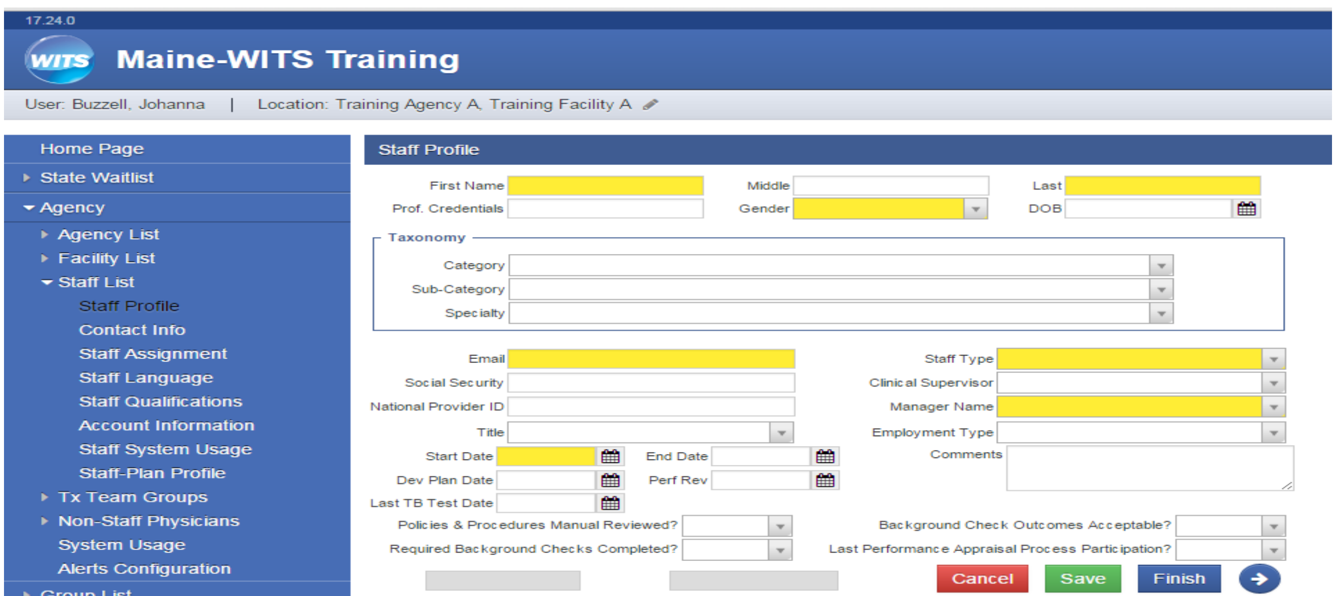
Step 1: Click on "Agency"

Step 2: Click on "Staff List"

Step 3: Click the "Add New Agency Staff Record" link

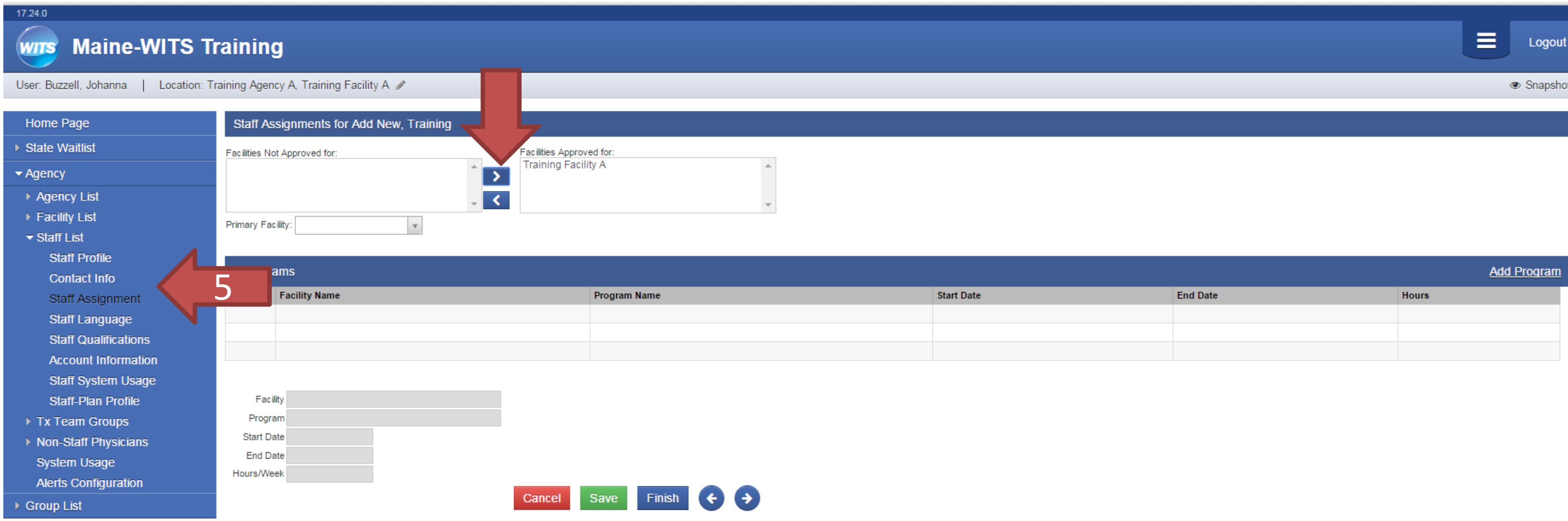


Step 4: Fill in all yellow fields then click "save"



Step 5: Click on "Staff Assignment" in the blue column on the left.

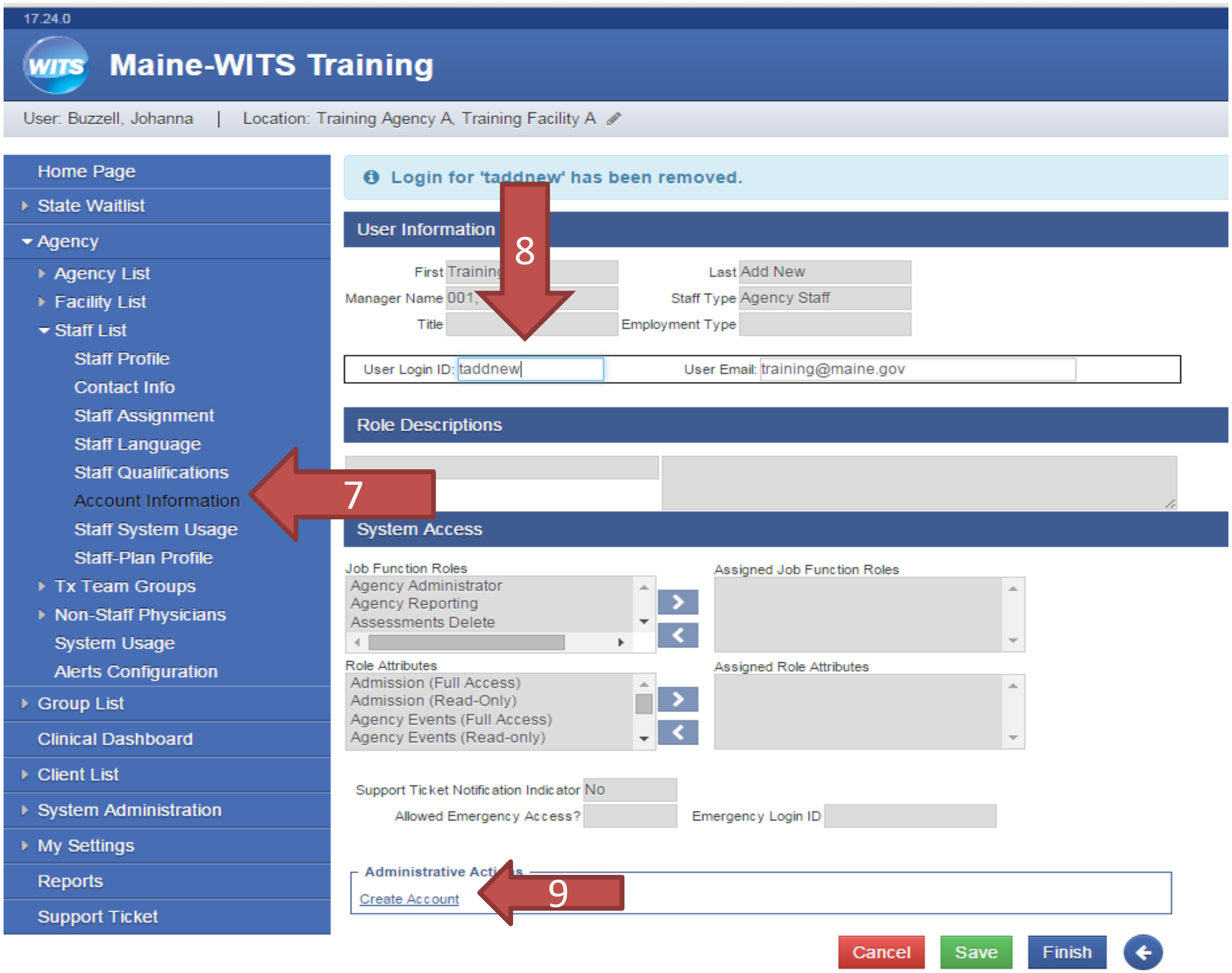
Step 6: Select the facility/facilities that the new staff member will need access to (to select multiple hold "ctrl" and click multiple) and click to move the facility over to the "Approved" box then click "save"



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

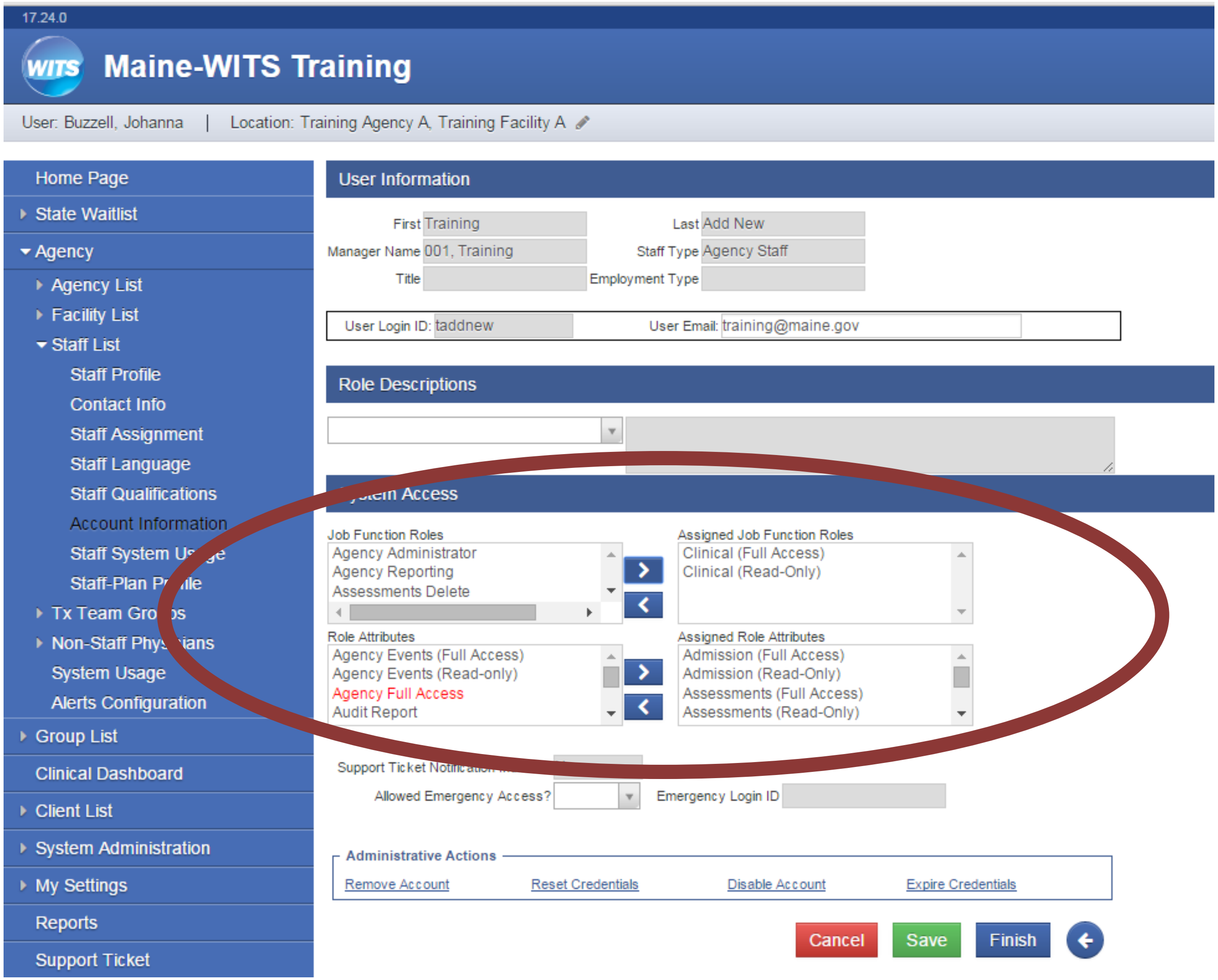
Step 8: Create User Login ID. (this will be the first initial and last name of the staff member.

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



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

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”



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	

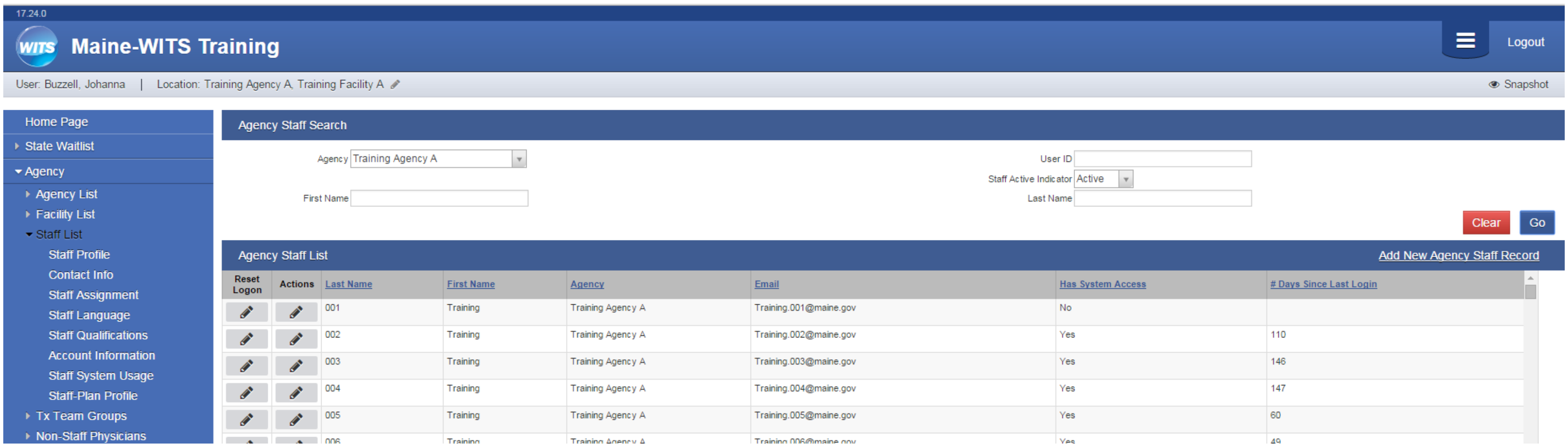
Agency Administrator

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

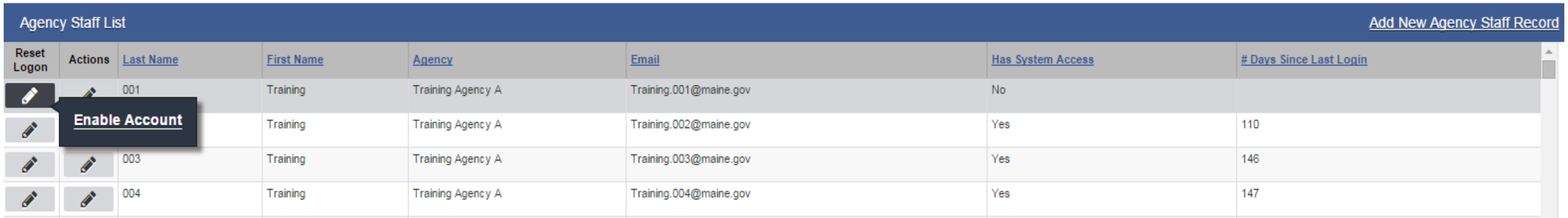
- Agency Administrator
- Clinical Full Access
- Clinical Supervisor
- Cross-Agency Waitlist Management (Full Access)
- Facility Administrator
- Staff Administrator

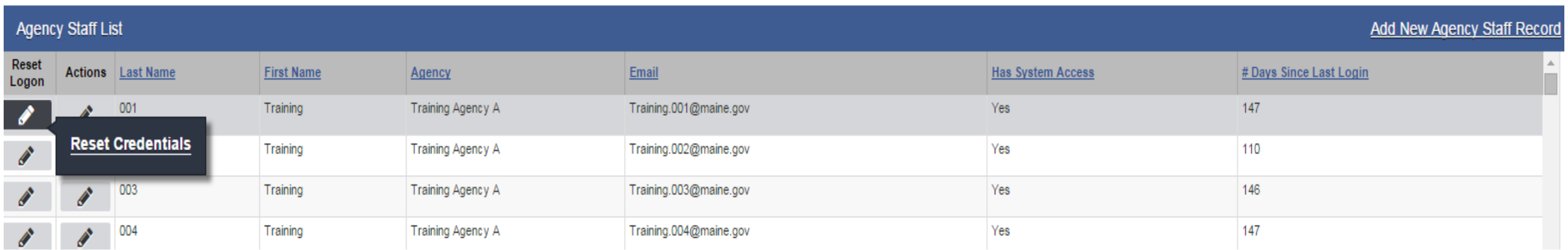
Resetting/Unlocking Accounts

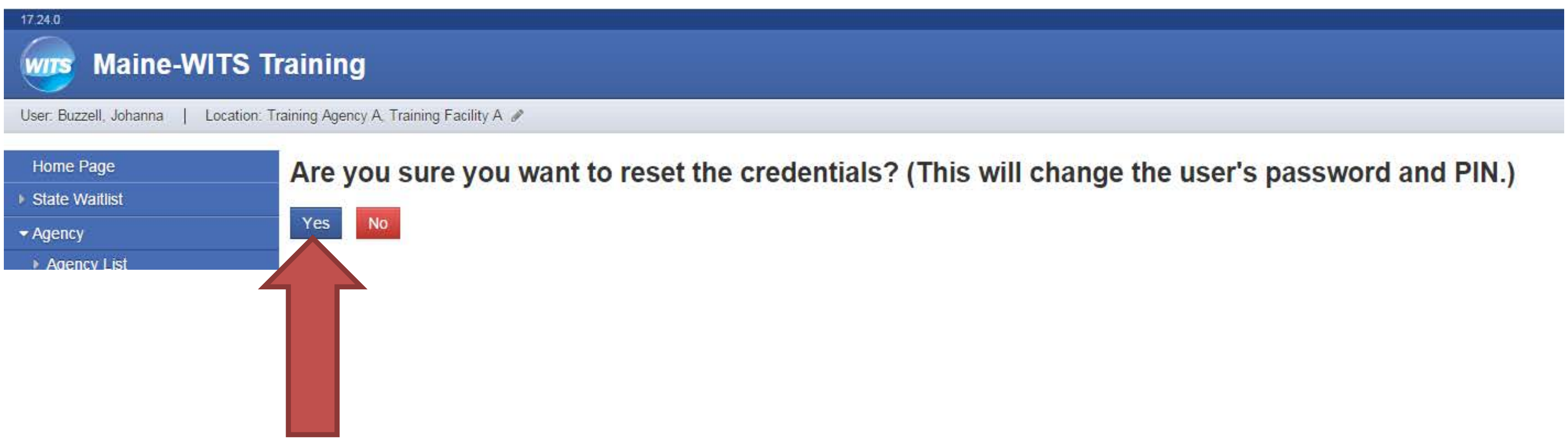
- **Step 1:** Bring up your staff list (Agency→Staff List→"Go") You should see a screen resembling the one below with your staff listed.



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







Still Need Help?

- Please feel free to contact johanna.buzzell@maine.gov with any questions you may have.