

Clinical Dashboard Set-Up

Designate the Clinical Supervisors in WITS

1. **Getting here:** Login, on the Navigation Pane (left menu) select **Agency, Staff List**, and **Review the Staff Profile**.
2. Select the Staff Type of Clinical Supervisor.
3. Repeat for all Clinical Supervisors.

Staff Profile

First Name: Michelle Middle: Last: Brownfield
 Prof. Credentials: CADC Gender: Female DOB:

Taxonomy
 Category:
 Sub-Category:
 Specialty:

Email: buskeym@dhw.idaho.gov Staff Type: **Clinical Supervisor**
 Social Security: Clinical Supervisor:
 National Provider ID: Manager Name: SSRS, Tester
 Title: Employment Type:
 Start Date: 1/1/2012 End Date: Comments:
 Dev Plan Date: Perf Rev:
 Last TB Test Date:

Policies & Procedures Manual Reviewed? Unkno Background Check Outcomes Acceptable? Unkno
 Required Background Checks Completed? Unkno Last Performance Appraisal Process Participation? Unkno

brownm 5/5/2014 2:34 PM Cancel Save Finish

Staff Employment History

Start Date	End Date	Prof. Credentials	Updated Date	Updated By
1/1/2012		CADC	5/6/2014	Buskey, Michelle

Assign a Clinical Supervisor to All Clinical Staff in WITS

1. **Getting here:** Login, on the Navigation Pane (left menu) select **Agency, Staff List**, and **Review the Staff Profile**.
2. Select the Name of the appropriate Clinical Supervisor.
3. Repeat for all clinical staff.

Staff Profile

First Name: Beta Middle: Last: Tester
 Prof. Credentials: Gender: Female DOB:

Taxonomy
 Category:
 Sub-Category:
 Specialty:

Email: buskeym@dhw.idaho.gov Staff Type: Agency Counselor
 Social Security: Clinical Supervisor: Brownfield, Michelle, CADC
 National Provider ID: Manager Name: Williams, Dennis
 Title: Employment Type:
 Start Date: 3/1/2014 End Date: Comments:
 Dev Plan Date: Perf Rev:
 Last TB Test Date:

Policies & Procedures Manual Reviewed? Unkno Background Check Outcomes Acceptable? Unkno
 Required Background Checks Completed? Unkno Last Performance Appraisal Process Participation? Unkno

betatester 5/6/2014 12:52 PM Cancel Save Finish

Staff Employment History

Start Date	End Date	Prof. Credentials	Updated Date	Updated By
3/1/2014			3/6/2014	Buskey, Michelle

Primary Staff Set Up for the Clinical Dashboard

1. **Getting here:** Login, on the Navigation Pane (left menu) select Agency, Facility List, and Primary Staff Set Up.

2. Select Treatment Team Primary Care Member as the Primary Value.

NOTE: When a Primary Value exists on a client record, the data will be returned only if no Secondary Value and Tertiary Value exist on a client record.

3. Select Treatment Team Case Manager as the Secondary Value.

NOTE: When a Secondary Value exists on a client record, the data will be returned only if no Primary Value exist on a client record.

Home Page
 Agency ▼
 Agency List ▶
 GPRA Discharge Due
 GPRA Followup Due
 Facility List ▼
 Facility Profile ▶
 Contacts
 Special Services
 Programs
 Operating Hours
 Primary Staff Set Up
 Staff List ▶
 Tx Team Groups ▶
 System Usage
 Drug Screening ▶
 Billing ▶
 Contract Management ▶
 Alerts Configuration
 Vendor Management ▶
 Group List ▶

Facility List	
Facility Name	
Williams Treatment	
Alternative Treatment Location	

WITS Idaho-WITS Training
 User: Williams, Denise
 Loc: D Williams Agency, Williams Treatment
 Client:
 Printable View

Home Page
 Agency ▼
 Agency List ▶
 GPRA Discharge Due
 GPRA Followup Due
 Facility List ▼
 Facility Profile ▶
 Contacts
 Special Services

Primary Staff Set Up

Primary Value: Treatment Team Primary Care Member
 Secondary Value: Admitted by
 Case assigned to
 Tertiary Value: Treatment Team Primary Care Member
 Treatment Team Case Manager

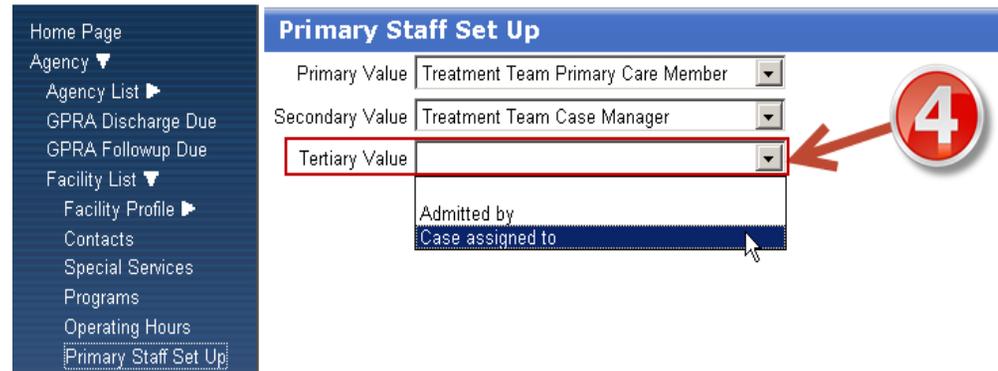
Home Page
 Agency ▼
 Agency List ▶
 GPRA Discharge Due
 GPRA Followup Due
 Facility List ▼
 Facility Profile ▶
 Contacts
 Special Services
 Programs
 Operating Hours
 Primary Staff Set Up

Primary Staff Set Up

Primary Value: Treatment Team Primary Care Member
 Secondary Value: Treatment Team Case Manager
 Tertiary Value: Admitted by
 Case assigned to
 Treatment Team Case Manager

4. Select **Case Assigned To** for the Tertiary Value.

NOTE: When a Tertiary Value exists on a client record, the data will be returned only if no Primary Value and Secondary Value exist on a client record.



The screenshot shows a web application interface for 'Primary Staff Set Up'. On the left is a dark blue navigation menu with the following items: Home Page, Agency (with a dropdown arrow), Agency List (with a right-pointing arrow), GPRA Discharge Due, GPRA Followup Due, Facility List (with a dropdown arrow), Facility Profile (with a right-pointing arrow), Contacts, Special Services, Programs, Operating Hours, and Primary Staff Set Up (highlighted with a dashed border). The main content area has a blue header 'Primary Staff Set Up'. Below the header are three dropdown menus: 'Primary Value' set to 'Treatment Team Primary Care Member', 'Secondary Value' set to 'Treatment Team Case Manager', and 'Tertiary Value' which is currently open. The 'Tertiary Value' dropdown menu has a red border and shows two options: 'Admitted by' and 'Case assigned to', with the latter selected and highlighted in blue. A red arrow points from a red circle containing the number '4' to the 'Case assigned to' option. A mouse cursor is visible over the 'Case assigned to' option.