

**Introductions:**

FEI:	Jennifer Conrad
	Lee Keitz
	Marion Sarhy
	Sarah Moore
San Diego:	Alice McLennan
	Patty Madison
Sonoma:	David Sheaves
Hawaii:	Scott Jun

**Please note: Action items (some for FEI, some for the WUG) appear in *bold italics*.**

**New Business:**

1. Enhancement #5042: Treatment Team: Default "is review member" to 'no' when adding treatment team group
  - a. Sonoma says they don't use it but this change would be consistent
  - b. No objections noted
2. Enhancement #5119: Treatment Plan: Add a "delete" action to the planned services list screen
  - a. No comments or objections
3. Enhancement #5044: Treatment Plan: Allow the creation of a future treatment plan without inactivating the current one
  - a. No comments or objections
4. Enhancement #4683: Client Profile: Move fields from Additional Information to Client Profile and Reorganize Layout
  - a. This item has been held open for ongoing discussion. However, the ultimate decision was that this will be done for Hawaii only. Concern about some customers having required fields that remain on the Additional Information screen (so you still have to navigate there even after this enhancement) ultimately led to the decision.
5. ***Changes to the Group Notes module (proposed since they will be implemented as a part of the new Prevention module) will be posted to the forum for approval.***
  - a. Enhancement #5198: Group Profile List: Add a link to Group Roster
  - b. Enhancement #5199: Group Profile: Create an Administrative Actions box to host all links
  - c. Enhancement #5203: Group Roster: Inactive Status

**Additional Comments & Questions:**

- Concern was voiced about a potential security breach if unencrypted emails are sent from SSRS (subscription function). ***FEI will investigate the possibility of adding an encryption feature.*** In the meantime, Sonoma is working around the problem by emailing the URL of the report instead of the actual report. Email recipients that don't have the correct permissions will not be able to access the URL.

- San Diego recently had a problem where an Announcement was created by a user who did not enter an end date for the Announcement and who subsequently left. They had a very difficult time trying to delete the Announcement. They wondered if anyone else had experienced similar problems.
  - a. Participants in the call indicated that this was not a big concern for them, so San Diego may choose to address this issue on their own.
- San Diego is interested in adding a link on the Client Roster to be able to record a Payment from that screen. This may become a WUG item.
  - a. Participants on the call did not object.
- San Diego is also adding a field on the Additional Information screen for 'Primary Race'. This is a reporting requirement for some of their grants.

**Old Business:**

Attached are the revised Role descriptions that FEI proposes to update in WITS. Please let us know if you have any questions about the proposed description updates.

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Role	Level	Description	Configuration
aap_PaymentReviewer	Job Function Roles	Access to Provider Claim Submission and Provider Claim Submission Profile screens (only for staff member's linked contracts) under Agency/Payor Adjudication/Claim Submission, no access to Adjudicate Contract link on the Provider Claim Submission Profile screen.	arizona
aap_AuthorizationRestricted	Job Function Roles	User has access to add/edit authorization (voucher) but cannot change the number of units when adding a service to the authorization (voucher).	atr
aap_AuthorizationView	Job Function Roles	Read-Only access to Authorization (Voucher) on Client List/Activity List/Authorization (Voucher)	atr
aap_AuthorizationFull	Job Function Roles	Full access to Authorization (Voucher) on Client List/Activity List/Authorization (Voucher)	atr
aap_ATRProviderClinical	Role Attributes	This role can accept referral from a case manager agency then provider client services in the provider agency.	atronly
aap_ATRProviderBilling	Role Attributes	This role gives provider billing privileges at agency level besides clinical functions.	atronly
aap_ATRCaseManager	Role Attributes	ATR Case Manager can create client intake, GPRA, and refer client to another provider agency.	atronly
aap_AgencyBilling	Job Function Roles	Full access to the Agency Billing screens under Agency/Billing.	billing
aap_ReleaseToBilling	Job Function Roles	Allows user to release encounters to Billing by the Release To Billing action link on the Encounter Profile screen.	billing
aap_WITSBillingAdministrator	Role Attributes	Full access to the system wide billing screens including Agency/Billing, System Admin/Rate, Billing reports.	billing
aap_ClientPaymentFull	Job Function Roles	Full access to all options under Payments. Allows user to add a new payment under Activity List/Payment.	billing
aap_CreateClaimBatch	Role Attributes	Create Provider Claim Batches by Agency by the Create Batches link on the Agency/Billing/Claim Item List screen.	billing

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aap_FacilityClaimBatching	Role Attributes	Create Claim Batches by Facility by the Create Batches link on Agency/Billing/Claim Item List screen	billing
aap_BillingTxEncounterList	Role Attributes	Allow user to access the Encounter List screen under Agency/Billing.	billing
aap_RateView	Job Function Roles	Read-Only access to Agency Rate Profile on System Administration/Rates screen	billing
aap_ContractManagementView	Job Function Roles	Read-Only access to contracts screens under Agency/ATV Management	billing
aap_ContractManagementFull	Role Attributes	Full access to all contracts screens under Agency/ATV Management	billing
aap_ContractManagementNoAdjustments	Job Function Roles	Full access to contract management under Agency/ATV Management but without access to adjustments of on ATV Management/ATV List/Authorization Period/Tiers/Adjust link.	billing
aap_CALOMSExtract	Role Attributes	Allow user to extract the CALOMS data on System Administration/CalOMS screen.	caloms
aap_Court	Job Function Roles	Full access to options under Court module.	court
aap_Judge	Job Function Roles	Limited access to options under Court module. Unlike Court role, Judge role cannot create client.	court
aap_DispensaryInventoryFull	Role Attributes	Allows user to add and adjust Dispensary Inventory items on Dispensary/Manage Inventory screen.	dispensary
aap_DispensaryInventoryView	Role Attributes	Allows user to view Dispensary Inventory items on Dispensary/Manage Inventory screen	dispensary
aap_DispensaryDispenseMedicationsFull	Role Attributes	Allows user to dispense Dispensary inventory with a written client Dispensary order on the Dispensary/Administer Inventory screen.	dispensary
aap_DispensaryDispenseMedicationsView	Role Attributes	Allows user to view dispensed and ordered medications on the Dispensary/Administer Inventory screen.	dispensary
aap_DispensaryOrderingFull	Role Attributes	Allows user to order dispensed medications for a particular client on Client List/Activity List/Treatment/Dispensary Ordering screen.	dispensary
aap_DispensaryOrderingView	Role Attributes	Allows user to view orders for dispensed medications for a particular client on Client List/Activity	dispensary

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		List/Treatment/Dispensary Ordering screen.	
aap_DrugTestFacilityAppointments	Job Function Roles	Access to the Drug testing Check In/Appointment Search screen.	dtms
aap_DrugTestCheckIn	Role Attributes	Ability to check-in clients for drug testing specimen collection on the Appointment Profile screen under Drug Testing Check In/Appointment Search.	dtms
aap_DrugTestObserver	Role Attributes	Ability to enter chain of custody events for a drug testing specimen on the Appointment Profile screen under Drug Testing Check In/Appointment Search .	dtms
aap_DrugTestClientAppointmentsPartial	Job Function Roles	Ability to view appointments for an individual client on the Appointment Profile screen under Drug Testing Check In/Appointment Search.	dtms
aap_DrugTestClientAppointmentsFull	Job Function Roles	Ability to view and edit appointments for an individual client on the Appointment Profile screen under Drug Testing Check In/Appointment Search.	dtms
aap_DrugTestProfile	Job Function Roles	Ability to edit the drug test profile on Client List/Activity List/Drug testing/Profile screen.	dtms
aap_DTMSLabFull	Role Attributes	Gives user full access to all areas of the Drug Testing Lab application	dtms
aap_DTMSLabWithoutScoring	Role Attributes	Gives user access to Drug Testing Lab application without ability to change scores/results	dtms
aap_DTMSCLerk	Role Attributes	Gives user access to Drug Testing Lab application to build and submit batches	dtms
aap_eCourtFull	Job Function Roles	Full access to all options under Client List/Activity list/eCourt.	ecourt
aap_eCourtView	Job Function Roles	Read-Only access to all options under Client List/Activity list/eCourt.	ecourt
aap_ClinicalSupervisor	Role Attributes	Full access to all clinical options under the Client List.	hawaii
aap_FacilityBillingFull	Role Attributes	Full access to the authorized facilities' claim item screens under Agency/billing.	hawaii
aap_FacilityBillingView	Role Attributes	Read-Only access to authorized facilities' claim item screens under Agency/billing.	hawaii

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aap_FollowupFull	Job Function Roles	Full access to all options under Client List/Activity List/Follow up.	iowa
aap_FollowupView	Job Function Roles	Read-Only access to all options under Client List/Activity List/Follow up.	iowa
aap_Followup	Job Function Roles	Full access to Agency options under Agency, Client Profile and Follow up under Client List.	iowa
aap_IowaReporting	Job Function Roles	Limited access to options under Client. To allow agencies to enter Iowa Reporting data in the existing I-SMART system and view this data via reports.	iowa
aap_SsaReconciliation	Job Function Roles	Access to SSA Reconciliation screen under Agency/Client Reconciliation.	maryland
aap_AgencyReconciliation	Job Function Roles	Access to Agency/Agency Reconciliation section (without SSA Reconciliation screen).	maryland
aap_DjsNeedsAssessmentDelete	Role Attributes	Allows the user to delete DJS Needs Assessments under Client List/MCASP Needs Assessment.	maryland
aap_SaisExtractionFull	Job Function Roles	The role has access to the SAIS Batch Errors screen under System Administration.	saisextraction
aap_ATRCaseManager	Role Attributes	ATR Case Manager can create client intake, GPRA, and refer client to another provider agency.	tennessee
aap_AdmissionFull	Job Function Roles	Full access to all options under Client List/Activity List/Admission.	wits
aap_AdmissionView	Job Function Roles	Read-Only access to all options under Client List/Activity List/Admission.	wits
aap_PlacementScreeningView	Job Function Roles	Read-Only access to all options under Client List/Activity List/Crisis and Placement.	wits
aap_PlacementScreeningFull	Job Function Roles	Full access to all options under under Client List/Activity List/Crisis and Placement	wits
aap_AgencyAdministrator	Role Attributes	This role should be assigned to the person in charge of setting up agencies (Agency Profile, Governance, Announcements, etc.), and creating facilities within the agencies. This role gives access to all sub-menus under the Agency List.	wits
aap_WITSOversightUser	Behind the scenes	This role enable user to access all assigned functions (on	wits

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		Agency List/Staff List/System access) in assigned agency in read only mode.	
aap_WITSOversightFullUser	Behind the scenes	This role enables user to have full access to all assigned functions (on Agency List/Staff List/System access) in assigned agency.	wits
aap_AgencyAccessFull	Job Function Roles	Full access to all agencies.	wits
aap_AssessmentsFull	Job Function Roles	Full access to all options under Client List/Activity List/Assessments.	wits
aap_AssessmentsView	Job Function Roles	Read-Only access to all options under Client List/Activity List/Assessments.	wits
aap_CaseReopen	Role Attributes	Allow the user to re-open a closed case on Client List/Activity List/Intake screen.	wits
aap_ClientDiagnosis	Job Function Roles	Full access to the Diagnosis fields on Client Diagnosis screens under Client List/Activity List/Assessments/Diagnosis, Admission/Diagnosis, or Treatment/Tx Plan/Diagnosis.	wits
aap_ClientProfileFull	Job Function Roles	Full access to all options under Client List/Client Profile.	wits
aap_ClientProfileView	Job Function Roles	Read-Only access to all options under Client List/Client Profile.	wits
aap_Clinical	Behind the scenes	This role allows access to the Client List/Activity List screen, but not any individual activities.	wits
aap_ClinicalFull	Role Attributes	Full access to all clinical options under the Client List/Activity list.	wits
aap_ClinicalView	Role Attributes	Read-Only access to all clinical options under the Client List/Activity list.	wits
aap_ClinicalFullNoNonTreatmentTeamAccess	Role Attributes	Full access to all clinical options under the Client List/Activity list except Non Treatment Team Access.	wits
aap_CodeTableAdministrator	Role Attributes	This role should be given to the person in charge of managing all of the WITS code tables on System Administration/Code table screen. This role should only be given to a handful of people within the state, as the implication to code table changes is state wide.	wits

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aap_AuditAdministrator	Behind the scenes	This role may be given to users' who manage the ability to pre-populate audit tables with old data.	wits
aap_ConsentFull	Job Function Roles	Full access to all options under Client List/Activity List/Consent.	wits
aap_ConsentView	Job Function Roles	Read-Only access to all options under Client List/Activity List/Consent.	wits
aap_DischargeFull	Job Function Roles	Full access to all options under Client List/Activity List/Discharge.	wits
aap_DischargeView	Job Function Roles	Read-Only access to all options under Client List/Activity List/Discharge.	wits
aap_FacilityAdministrator	Role Attributes	This role should be assigned to the person in charge of setting up facilities (Facility Profile, Operating Hours, Programs, etc.). This role gives access to all sub-menus under the Agency/Facility List.	wits
aap_IntakeFull	Job Function Roles	Full access to all options under Client List/Activity List/Intake.	wits
aap_IntakeView	Job Function Roles	Read-Only access to all options under Client List/Activity List/Intake.	wits
aap_NonTreatmentTeamAccess	Job Function Roles	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.	wits
aap_NotesDelete	Job Function Roles	User can delete the note on Client List/Activity list/Notes/Misc. Notes.	wits
aap_NotesFull	Job Function Roles	Full access to all options under Client List/Activity list/Notes.	wits
aap_NotesView	Job Function Roles	Read-Only access to all options under Client List/Activity list/Notes.	wits
aap_OutcomesFull	Job Function Roles	Full access to all options under Client List/Activity list/Outcomes.	wits
aap_OutcomesView	Job Function Roles	Read-Only access to all options under Client List/Activity list/Outcomes.	wits
aap_ReferralsFull	Job Function Roles	Full access to all options under Client List/Activity	wits

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		list/Referrals.	
aap_ReferralsView	Job Function Roles	Read-Only access to all options under Client List/Activity list/Referrals.	wits
aap_ScheduleStaffFull	Job Function Roles	Ability to manage the schedules for all staff in user's agency from Home page.	wits
aap_ScreeningFull	Job Function Roles	Full access to all options under Client List/Activity list/Screening.	wits
aap_ScreeningView	Job Function Roles	Read-Only access to all options under Client List/Activity list/Screening.	wits
aap_StaffAdministrator	Role Attributes	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, the Staff Administrator must also be a System Administrator (as indicated on the create login screen). This role gives access to all of the staff within an agency and all of the sub-menus under the Agency/Staff List menu.	wits
aap_StaffManagementFull	Job Function Roles	Full Access to Staff Assignment and Staff System Access (on Account Information screen) under Agency/Staff List.	wits
aap_StaffManagementView	Job Function Roles	Read-Only Access to Staff Assignment and Staff System Access (on Account Information screen) under Agency/Staff List.	wits
aap_HumanResourcesFull	Job Function Roles	Full Access to Staff Profile, Staff Addresses, Staff Language, Staff Qualifications, Staff Account, and Staff Plan Profile under Agency/Staff List.	wits
aap_HumanResourcesView	Job Function Roles	Read-Only Access to Staff Profile, Staff Addresses, Staff Language, Staff Qualifications, Staff Account, and Staff Plan Profile under Agency/Staff List.	wits
aap_StateReporting	Role Attributes	Access to reports for all agencies in the Report module.	wits
aap_AgencyReporting	Role Attributes	Agency Reporting - <b>still under investigation</b>	wits
aap_TxEncounterFull	Job Function Roles	Full access to all options under Client List/Activity	wits

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		List/Encounter.	
aap_TxEncounterView	Job Function Roles	Read-Only access to all options under Client List/Activity List/Encounter.	wits
aap_TxMedicationsFull	Job Function Roles	Full access to all options under Client List/Activity List/Treatment/Medications.	wits
aap_TxMedicationsView	Job Function Roles	Read-Only access to all options under Client List/Activity List/Treatment/Medications.	wits
aap_TxPlanFull	Job Function Roles	Full access to all options under Client List/Activity List/Treatment/TxPlan.	wits
aap_TxPlanView	Job Function Roles	Read-Only access to all options under Client List/Activity List/Treatment/TxPlan.	wits
aap_WITSAdministrator	Role Attributes	This is the supreme being within WITS. This is the only role that can create Agencies, and the only role that can grant the WITS Admin role to other users.	wits
aap_WaitListFull	Job Function Roles	Full access to all options under Client List/Activity List/WaitList.	wits
aap_WaitListView	Job Function Roles	Read-Only access to all options under Client List/Activity List/WaitList.	wits
aap_ServiceView	Job Function Roles	Read-Only access to System Administration/Service	wits
aap_ServiceFull	Job Function Roles	Full access to all System Administration/Service	wits
aap_ClientConfidential	Job Function Roles	Access to the Client Confidential screen under Client List/Client Profile/Confidential.	wits
aap_UniqueClientEligibility	Role Attributes	Access to Client List/Client Profile/Unique Client Eligibility screen.	wits
aap_EncounterDelete	Job Function Roles	Enable user to delete the encounter under Client List/Activity List.	wits
aap_GPRAFull	Behind the scenes	Full access to GPRA screen under Client List/Activity List.	wits
aap_GPRAView	Behind the scenes	Read-Only access to GPRA screen under Client List/Activity List.	wits
aap_ATRAdministrator	Behind the scenes	Full access to all ATR related functions in Agency and Client List.	wits
aap_RecordManagement	Behind the scenes	Allow the transfer of an episode and all related data	wits

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		between clients, and the ability to delete a client.	
aap_DrugScreening	Behind the scenes	Allow access to Agency/Drug Screening screens: Group (color) setup, screenings, payments, IOU, history, results, etc.	wits
aap_DrugTestResultFull	Behind the scenes	Enable the Add and Delete links on the Drug Test Results screen under Client List/Activity List.	wits
aap_NOMSAdministrator	Role Attributes	Provides access to the NOMS Extraction screen under System Administration.	wits
aap_AssessmentsDelete	Behind the scenes	Ability to delete certain assessments (DENS and ADAD) under Client List/Activity list/Assessments.	wits
aap_AgencyReportSubmission	Behind the scenes	Ability to initiate agency reporting on Agency/Reporting/Submission.	wits
aap_AgencyReportExtraction	Behind the scenes	Ability to monitor agency reporting on Agency/Reporting/Extraction.	wits
aap_ClientProfileAddRestricted	Behind the scenes	All permissions of ClientProfile(Full Access) but without the ability to add new clients.	wits
aap_AdmissionDelete	Behind the scenes	Allow the ability to delete Admission records under Client List/Activity List/Admission.	wits
aap_ScreeningDelete	Behind the scenes	Allow the ability to delete Screening records under Client list/Activity List/Screening.	wits
aap_StaffAdministratorRestricted	Behind the scenes	Same access as Staff Administrator EXCEPT that only 'read-only' roles may be assigned on the System Access screen.	wits
aap_APAdministratorView	Behind the scenes	Allows the Agency Administrator to view community hospital stay records for their agency, as well as associated estimated charges and invoiced paid amounts System Administration/Community Hospital A/P.	wits
aap_APAdministratorFull	Behind the scenes	Allows the State AP Administrator to view all community hospital stay records and process invoices against total estimated charges under System Administration/Community Hospital A/P.	wits

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aap_AuthorizationReopen	Behind the scenes	The role enables the Reopen hyperlink on the Authorization Profile screen under Client List/Client Profile/Authorization and Agency/Billing/Authorization List. Without this role, a user cannot re-open a previously closed authorization.	wits
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