WrapTrack

ADMINISTRATOR MANUAL

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This manual was created by the Wraparound Evaluation & Research Team (WERT) for local administrators of the Wraparound Fidelity Assessment System (WFAS) tools online data system – WrapTrack.

Administrator Manual

The Wraparound Fidelity Assessment System (WFAS) is a multi-method approach to assessing the quality of individualized care planning and management for children and youth with complex needs and their families. WFAS instruments located within the WrapTrack online data entry system include WFI-4 interviews with multiple stakeholders, a team observation measure (TOM), and a self-administered instrument (WFI-EZ) that is less time consuming than the full WFI interview. The instruments that comprise the WFAS can be used individually or, to provide a more comprehensive assessment, in combination with one another.

The **Wraparound Fidelity Index 4.0 (WFI-4)** is a set of four interviews that measures the nature of the wraparound process that an individual family receives. The WFI-4 is completed through brief, confidential telephone or face-to-face interviews with four types of respondents: caregivers, youth (11 years of age or older), wraparound facilitators, and team members. The WFI-4 interviews are organized by the four phases of the wraparound process (Engagement and Team Preparation, Initial Planning, Implementation, and Transition). In addition, the 40 items of the WFI interview are keyed to the 10 principles of the wraparound process, with 4 items dedicated to each principle. In this way, the WFI-4 interviews are intended to assess both conformance to the wraparound practice model as well as adherence to the principles of wraparound in service delivery.

The **Team Observation Measure (TOM)** is employed by external evaluators to assess adherence to standards of high-quality wraparound during team meeting sessions. It consists of 20 items, with two items dedicated to each of the 10 principles of wraparound. Each item consists of 2-4 indicators of high-quality wraparound practice as expressed during a child and family team meeting. Working alone or in pairs, trained raters indicate the whether or not each indicator was in evidence during the wraparound team meeting session. These ratings are translated into a score for each item as well as a total fidelity score for the session overall.

The **Wraparound Fidelity Index, Short Version (WFI-EZ)** is a brief, self-report version of the Wraparound Fidelity Index v.4. Versions of the WFI-EZ are available for facilitators, caregivers, youths, and team members. All four versions parallel one another in terms of structure and item content, and can be completed either on paper or online. Beyond the questions about experiences in wraparound and adherence to the model, the WFI-EZ also contains questions about satisfaction and outcomes.

Please review the manual below in order to successfully manage users, organizations, and youth records in the WrapTrack online system.

CONTENTS

GETTING STARTED

A general note to begin: This manual is for local WrapTrack site Administrators only. For information directed at the Local Basic User, please see the accompanying manual for WrapTrack Local Users.

Located on our WERT website:
http://depts.washington.edu/wrapeval/training.html

ADMINISTRATIVE USERS

There are typically four types of **Administrative User** Accounts in WrapTrack;

- the ***Configuration Administrator***;
- the ***Jurisdictional Administrator***;
- the ***Program Administrator***; and
- the ***Supervisory Administrator***.

Within each *Configuration* there is a single **Configuration User**. This account is responsible for setting-up the *Organizations*, *Roles* and *User Accounts* within the **Configuration**. The Configuration User/Administrator can add sub-sites (organizations) in WrapTrack - but please be reminded – there are <u>additional fees for each sub-site</u>, to be invoiced by the Center for Commercialization (C4C) and the University of Washington. If you have questions regarding fees, please contact us at <u>wrapeval@uw.edu</u>.

The Configuration User Account is created and maintained at the University of Washington, by the Wraparound Evaluation & Research Team (WERT) Design Administrators (who can also help set up organizations, roles, and users). This Account has complete access to the Configuration and cannot be deleted. It is part of the Configuration Hierarchy and cannot be used as a Supervisor of another User.

The local head of each community will be assigned the **Configuration Administrator** role and will determine which staff will also fall into these Administrative and/or User roles. Users in the remaining administrative roles may have similar or different permissions depending on the configuration needs. This is fully customizable for each community.

DEFINE STRUCTURE

A Configuration is a collection of *Organizations* and *Users* working together to provide services to a youth and family. WrapTrack is a highly-flexible system and each Configuration can be setup to meet the needs of individual community. While each Configuration can be adjusted and modified, it is a good idea to have a diagram of how you want to setup your Configuration before you begin. The *Organizations* and *User Roles* you enable/create define how Youth Information is shared within the system. Use the *Configuration Setup Worksheet* (**Appendix A**) to help diagram the structure of your **Configuration**.

A *Configuration* may contain one or more *Organizations*, with one or more *Users* collecting and sharing information. Each User in WrapTrack is assigned a *User Role,* which determines what **Permissions** that User has within the Configuration.

Once you have determined how you want to setup your Configuration, the first step is to add your *Organizations*. Having your Organizations in the system first will allow you to easily add them to Users, when you create them. (This will save you many steps later on!) By default there will be one Organization pre-built in your new Configuration. This Organization will carry-over the Configuration information (Name and Address.) You may **Edit** but not **Delete** this Organization.

CREATE ORGANIZATIONS

> *Note*: In the past, and in the old WONDERS data system, we would often refer to Organizations as "Sub-sites" or as "Businesses". Here they are referred to as "Organizations"

Select the **Admin** button on the Navigation Bar and then the 'Administrative Tool' link. Then Select the *Organization* Tab and '*Add Organization'*.

The only required data element on this page is the *Organization Name*, but the more data you enter, the less updating you will have to do later. Once you have filled in all the data, select the 'Save' button to create your new Organization. You can continue adding Organizations, or view your existing Organizations. (Select the 'View All' link, or 'Manage Organizations' from *Organizations* Tab.)

Your new Organization will now be displayed on the Page.

From this screen you can **Edit** the details of your Organization, or **Delete** it altogether.
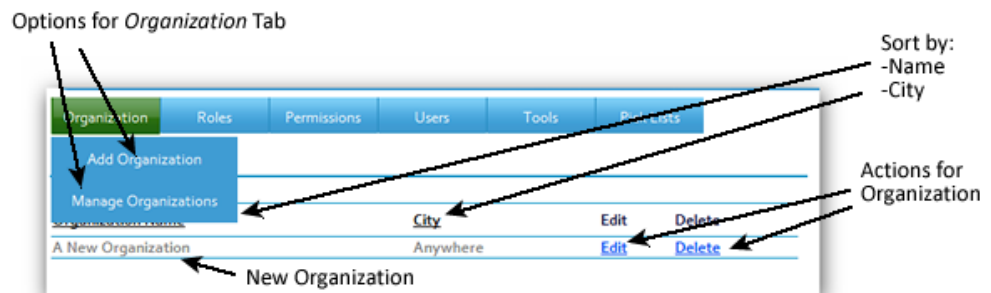
All Organizations are listed alphabetically by name. You can also sort the list by *City* by selecting the heading link. (Deleting the Organization removes it from the system, but does not affect *Users* associated with it.) You may also enter organizations from the **User** tab. This will allow you to enter the organization name only. Once that is complete, the user must access the **Organization** tab to complete the remaining information.

SELECT/CREATE USER ROLES

Using the *Configuration Worksheet* (**Appendix A**), Select or Add the *User Roles* you wish to use in the Configuration.

At a minimum, you must have the **ConfigAdmin**, **ProgramAdmin**, **SupervisoryAdmin**, and **TeamMembers** *User Roles*. However, there are several other built-in *User Roles* you can use, or you can create and add your own *User Roles* to the system. *User Roles* determine the <u>level of access</u> to data in the system, and whether or not you can <u>perform certain functions</u> within the system. (For a complete list of **Permissions**, see **Appendix B**.)

That said, for most *Configurations*, the basic user roles that have been programmed into the system will allow for plenty of flexibility within WrapTrack.

For past WONDERS Users:

WrapTrack roles compared to those in WONDERS		
WONDERS Role	**WrapTrack Role**	**Type of User**
LEVEL 1 (WERT)	Design Admin	WERT
LEVEL 2 (Local Head)	*Configuration Admin / Jurisdictional Admin*	Local Head
LEVEL 3 (Entry, Reporting, Exporting)	*Program Admin*	Supervisor, Facilitator, Data Entry
LEVEL 4 (Data only)	*Supervisory Admin*	Supervisor, Facilitator, Data Entry
LEVEL 5 (Reporting only)	*Team Member*	Supervisor, Facilitator, Data Entry

**See Item 2 on *page i* in Appendix A.

Please note that some of the examples and terms used within Appendix A relate to Wrap-TMS. If there are any questions about these terms or about Wrap-TMS, please contact the UW WERT team at wrapeval@uw.edu.

ESTABLISH HIERARCHY

Once you have described your *Organizations* and *User Roles*, you should next establish the **Hierarchy** structure for your *Configuration*. Using the *Configuration Worksheet* (provided in **Appendix A**), fill-in the *Organizations* and *User Roles* in the **Hierarchy** section and determine which *User Roles* will supervise which other *User Roles*. **Remember: This will determine access to Youth Records!** For example; *Jane Doe* has access to *Youth Records A, B* and *C*, and *Mary Smith* has access to *Youth Records D, E* and *F*; If *Jill Johnson* supervises *Jane Doe* **and** *Mary Smith*, then *Jill Johnson* has access to *Youth Records A, B, C, D, E,* and *F*. **Supervision can also cross Organizations!** *(Additional examples of Hierarchy provided in **Appendix A**.)*

Roles:
- ProgramAdmin (Org A)
supervises:
   - SupervisoryAdmin (Org A)
   supervises:
      - Facilitator (Org A)
supervises:
   - SupervisoryAdmin (Org B)
   supervises:
      - Facilitator (Org B)

3. HIERARCHY. Define the Hierarchy (*Supervision*) of User Roles for each Organization:

Org 1: **New Org A.**
Role(s):
ProgramAdmin
Supervises Role(s):
SupervisoryAdmin
Supervises Role(s):
Facilitator
Supervises Role(s):

Org 2: **New Org B.**
Role(s):
Supervises Role(s):
SupervisoryAdmin
Supervises Role(s):
Facilitator
Supervises Role(s):

Org 3: _____
Role(s):
Supervises Role(s):
Supervises Role(s):
Supervises Role(s):

Example:

[User], [Role] [Organization] / Access to Youth Data:	A	B	C	D	E	F	G	H	I
Jane Doe, Facilitator (Org A)	X	X	X						
Mary Smith, Facilitator (Org A)				X	X	X			
Sue Brown, Facilitator (Org B)							X	X	X
Jill Johnson, SupervisoryAdmin (Org A)	X	X	X	X	X	X			
John Howard, ProgramAdmin (Org A)	X	X	X	X	X	X	X	X	X

You can also add *User Roles* that are not supervised, in which case they only have access to *Youth Records* where they are added as a *Team Member*.

By default, pre-built *User Roles* have a pre-set **Hierarchy**. When working in WrapTrack, you may be able to see other *Users* (in Pick Lists, for example), but only those at your *User Role level* or below. The **Hierarchy** for those *User Roles* is (in order from highest to lowest):

| Hierarchy		Default Name
special access	#^*	ConfigWide Admin
Highest	#	ProjectWideAdmin
		StateAdmin
		JurisdictionalAdmin
	*	ProgramAdmin
	*	SupervisoryAdmin
		SupervisoryAdmin2
		SupervisoryAdmin3
		FidelityAssessment/Evaluator
		Facilitator
Lowest	^*	TeamMembers
special access	^	Youth/Family
special access	^	Provider

* Denotes Default User Roles.
^ Cannot be assigned as a Supervisor or a Facilitator.
 # User Role has access to ALL Youth Records

Keep in mind, when setting-up your Hierarchy, that User Roles can only be supervised by a User Role *above* their level. For example, a *Supervisory Admin* can only be supervised by *Program Admin*, *Jurisdictional Admin*, *State Admin* or *Project-Wide Admin* User Roles, or their equivalent *Dynamic* User Roles.

DYNAMIC USER ROLES

You can create any number of **Dynamic User Roles**, should your Organization use different language for your Users. These are created by selecting *Add User Role* on the Administrative Page:
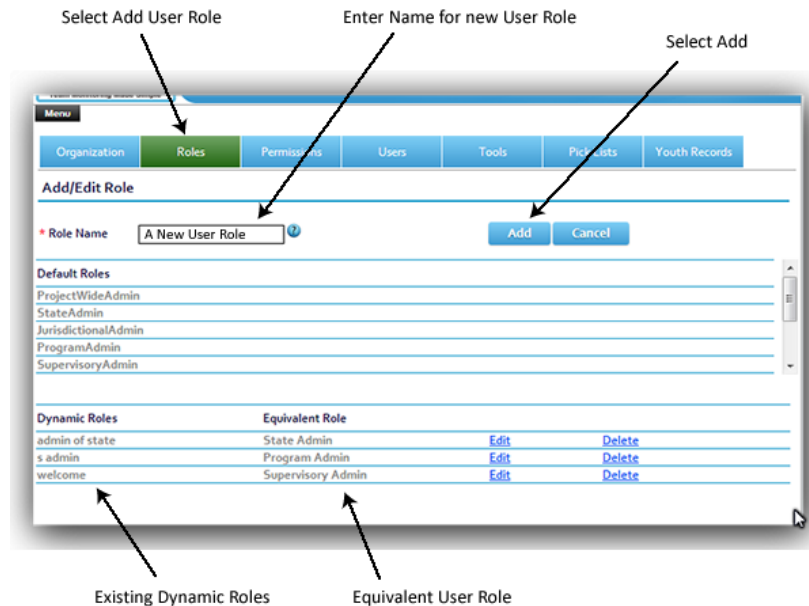
When you create a new User Role, you must identify the **Equivalent User Role** from the list of existing Roles. The Default Permissions and availability of Supervisors/Supervisees will be determined from your selection.

Type-in the name of your new User Role and select Add. You will then be presented with a Pick-List where you must select the Equivalent User Role:
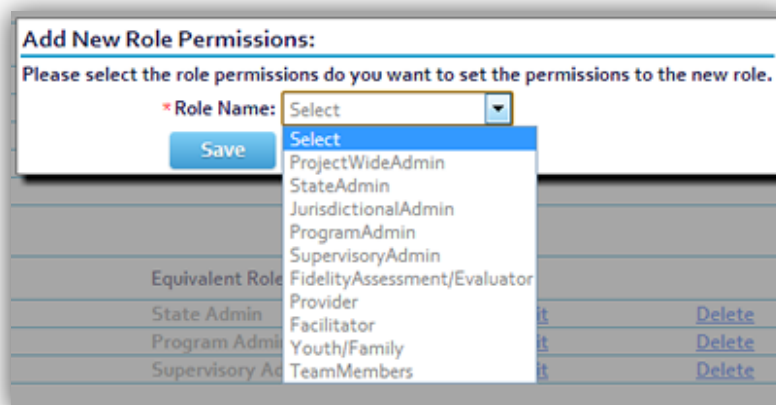
Select the Role level you would like your new User Role to be equivalent to from the Pick-List. Click *Save* and your new User Role will be added to the Configuration.

You will be able to edit the Name of your new User Role, or Delete it from the Add/Edit User Role Page if you make a mistake.

If you Delete a Dynamic User Role, any existing Users that are associated with that User Role will default back to the *Equivalent* User Role.

Once you have determined the **Hierarchy** of your *Configuration* and have setup your preferred *User Roles*, you can begin adding *Users*.

ADD USERS TO CONFIGURATION

On the *Admin Page*, select *Users* then *Add User* to create a new User account.

The *User Name* must be unique in WrapTrack. After entering a *User Name*, use the 'check availability' link to see if the *User Name* is available.

Unlike the *Configuration Administrator*, you can enter a password here.

The User *Email* is used to reset the *Password*, should the User forget it. Please make note of which email address is used, as this is key in password retrieval.

When you select a *User Role*, the list of *Supervisors* is populated with Users whose *User Role* is higher in the **Hierarchy**.

After you select an *Organization*, you can carry-over the *Organization Address* using the radio-button.

Because you select the *Supervisor* when you add a *New User*, **you should enter Users from the top-down**.

User *Email Address* is used by the system, should the User forget his/her *Password*. If you do not have the User's *Email Address*, you can enter a fake address (using the format Unknown@wrap-tms.org) and the User can update their information when they login.

ADDING OR UPDATING FACILITATOR NAMES

The *Facilitator* field has been added to the Youth Record and must be completed by a user at the time a new record is created.

In order to have the appropriate Facilitator selected from the dropdown menu by a user, the Configuration Administrator must first create the list of Facilitators.

From the Main Menu, select *Admin* then *Administrative Tool*. Click on the *Facilitator* tab at the top.

Add a name or ID number into the *Facilitator Name* box, and then click *Add New Facilitator* to save these changes. Assign The Facilitator to an Organization(s) at this time. II. Facilitators will now be connected to Organizations (a.k.a., sub-sites) in an effort to keep the dropdown lists smaller for users. Additionally, this process will limit users to only see the facilitators connected to the work in their agencies, which again will shorten the dropdown lists.

Once you have saved the Facilitator Name, you can Add, Edit, or Delete any name from this

list as needed. Users can edit the Organizations for a Facilitator by selecting the link and checking the appropriate boxes. See "Change of Permissions" to allow more user roles to make these edits AND to add new Facilitators.

The check boxes already selected are those Organizations which Facilitators are already connected based on the youth records.

Any WFI-4, TOM, or WFI-EZ forms will have a *Facilitator* field which will now be auto-populated with the name or ID number used in the youth record.

Additionally, this data field is not capable of being a historical field, so the most recent Facilitator for a family will be shown on all forms. Any records already created will use the *Facilitator* name or ID number from the current TOM form first, then the WFI-EZ form, and then the WFI-4 form, in that order (i.e., if you only use the TOM, then that is the name/ID that will be used in the dropdown menu).

It is extremely important for all users to double-check the *Facilitator* field for accuracy when looking at current youth records.

PERMISSIONS

Permissions determine which *functions* a User has access to in the Configuration. (A complete list of **Permissions**, and the default *User Role* access is included in **Appendix B**.)

By selecting *Admin/Administrative Tool* using the Menu, you can access the *Permissions Tab*.
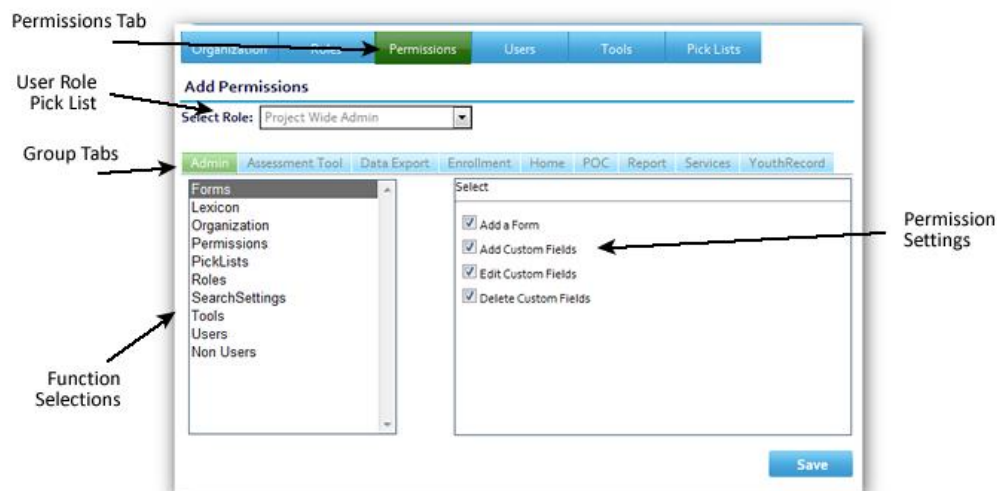
First select a *User Role* from the drop-down Pick List to see the assigned **Permissions** for that *User Role*. (Only *User Roles* you have enabled for the Configuration will appear in the list.) You can Tab through the *Groups* to see specific *functions* and related **Permissions**. To add a **Permission**, check the box and *Save* the record.

Wraparound Facilitator Permissions

Select the user **Role** from the dropdown list that you would like to give Permissions to add/edit/delete Facilitator information. Make sure all desired Check Boxes are selected before hitting "Save". Continue this process until each User Role has the appropriate Permissions to modify the Facilitator role.

Search by Facilitator

I.   Menu -> Admin -> Configuration Settings -> General System Settings

II. Make sure Facilitator is checked here – and any other selections you would like to have display while working with all youth records.

III. Then go to Menu -> Enrollment -> Work with All Youth Records

Refresh						
Last Name	**First Name**	**Date of Birth**	**Enrolled Status**	**Facilitator**	**Wrap ID**	**Organization**
364798	364798		Enrolled	Tim	364798	19 Wrap Test Site Config
Smitts	Jimmy	07/05/2000	Enrolled	Tay	866144967	Org 2
22587	22587	02/01/2000	Enrolled	Mary	225872	19 Wrap Test Site Config
Rawley	Erick	01/30/2007	Enrolled	Jules	654654654	Org 2
Sitka	Amber	06/02/2000	Enrolled	Jules	456832	Org 2
123-kj	123-kj	09/20/2010	Enrolled	Jim	123-kj	Org 2

This will allow you to search for all youth connected to the Facilitators. This is helpful when a user would like to "clean up" a cluttered list of Facilitators (e.g., if there were misspelled names, etc.).

YOUTH RECORDS

ACCESS TO YOUTH RECORDS

Youth Records are only available to Users based on these two **Business Rules**:

1. The User Created the Youth Record, or;
2. The User is assigned as a role higher than the Creator of the Youth Record.

Please note that Admin Users in roles higher than the Youth Record Creator can only view youth who have been Enrolled in the system, not those still listed as Pending. However, Configuration Administrators can see all youth records regardless of enrollment status

Only the **Configuration-Wide Administrator** and the **Project-Wide Administrator** have access to *all* Youth Records. Of these two User Roles, only the *Project-Wide Administrator* can be assigned as a supervisor for another User Role.

In order to provide the maximum flexibility, there is an additional feature available to help manage access to Youth Records.

MANAGING YOUTH RECORDS

With appropriate Permissions, a User can manipulate Youth Records in the 'Youth Records' Tab on the Admin Page:

Youth Records Tab on the Admin Page
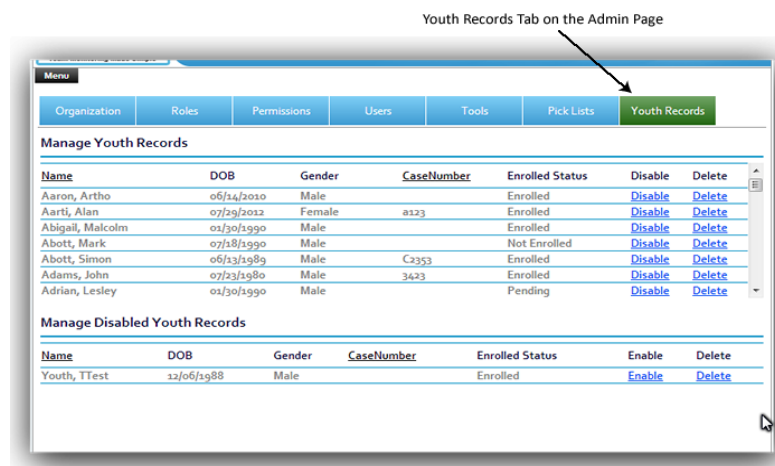
This page will display all the *Active* Youth Records available to the User Account, plus any currently *Disabled* Youth Records. This is where you can Delete or Disable any existing Youth Record in your Configuration.

DISABLE YOUTH RECORD

You may wish to remove a Youth Record from the system while keeping the data history, or you may want to temporarily remove a Youth from your counts, but expect that Youth to return to your program in the near future. You can do this by *Disabling* the Youth Record. This will remove the Youth from counts, dashboards, reports, exports, etc., but retain the data for later use. Should the Youth return to your program later, you can Enable the youth record and restore all the data.

Keep in mind that you can only disable a Youth Record containing <u>existing</u> Assessment data. If Youth Record does not contain any Assessment data, you cannot Disable it.

DELETE YOUTH RECORD

This is where you can *Delete* a Youth Record from your Configuration. All data concerning that Youth will be permanently removed from your Configuration. You cannot retrieve a Youth Record you have Deleted, so use this with caution!

ENABLE YOUTH RECORD

At the bottom of this page is a listing of any currently *Disabled* Youth Records. This is where you can *Enable* one or more of those records. Disabled Youth Records are also **included** in the duplicate check when adding a New Youth Record. If a duplicate is found, a Disabled Youth Record can also be Enabled from the Add New Screen.

When a Disabled Youth Record is Enabled, the *Creator* is designated as the User that Enabled that Youth Record, allowing that User to have access to that Youth Record.

GO TO ADMIN SETTINGS

ACCESS AND ACTIVITY MONITOR

Administrators can monitor User Access (login time, logout time, User IP, and browser).

APPENDIX A. WRAPTRACK CONFIGURATION WORKSHEET

1. ORGANIZATIONS. *Describe* the **Organizations** in your Configuration:

Name: _____	Name: _____	Name: _____
Street 1: _____	Street 1: _____	Street 1: _____
Street 2: _____	Street 2: _____	Street 2: _____
City: _____	City: _____	City: _____
State: _____ Zip Code: _____	State: _____ Zip Code: _____	State: _____ Zip Code: _____
Phone: _____	Phone: _____	Phone: _____
Fax: _____	Fax: _____	Fax: _____
Contact: _____	Contact: _____	Contact: _____
MA Number: _____	MA Number: _____	MA Number: _____

2. USER ROLES. *Identify/Select/Create* the **User Roles** you wish to use in your Configuration:

Default User Roles (Add/Edit Roles)

    ConfigAdmin

    ProgramAdmin

    SupervisoryAdmin

    TeamMembers

Built-In User Roles (Basic Roles)**

☐   State Admin

☐   Jurisdictional Admin

User-Created Roles (Add/Edit Roles)

☐   _____

☐   _____

☐   _____

☐   _____

☐   _____

3. HIERARCHY. Define the **Hierarchy** (*Supervision*) of **User Roles** for each Organization:

Org 1: _____	*Org 2:* _____	*Org 3:* _____
Role(s):	*Role(s):*	*Role(s):*
_____	_____	_____
Supervises Role(s):	*Supervises Role(s):*	*Supervises Role(s):*
_____	_____	_____
Supervises Role(s):	*Supervises Role(s):*	*Supervises Role(s):*
_____	_____	_____
Supervises Role(s):	*Supervises Role(s):*	*Supervises Role(s):*
_____	_____	_____

Completing this **Configuration Worksheet** will help you setup your new **Configuration**.

For the **Hierarchy**, identify which *User Roles* Supervise other *User Roles*. <u>This is a **critical** identification as access to Youth and Family information is determined by this selection.</u>

System Logic:

A User has access to the Youth Record *if*;

- o They *entered the data* into the system, or
- o They *supervise* a User who has access.

Pre-built *User Roles* have a predefined **Hierarchy**:

<div align="center">

Configuration Admin
(Has access to *All Youth Records* in Configuration)
▼
State Admin
▼
Jurisdictional Admin
▼
Program Admin
▼
Supervisory Admin
▼
Team Members

</div>
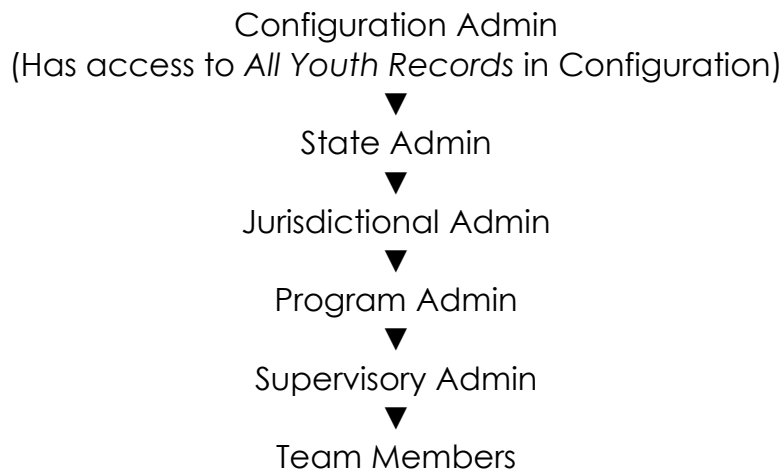
A *User Role* can only be supervised by a *User Role* higher in the **Hierarchy**.

If you *create* a new User Role, you will be asked to base the *Permissions* on an existing User Role. This will also set the **Hierarchy** of that new User Role.

Example: If I create a new User Role called *Care Coordinator*, and base it on the existing User Role *Facilitator*, my new User Role can be supervised by any User Role list above *Facilitator* in the list, above.

HIERARCHY EXAMPLES:

ONE ORGANIZATION WITH THREE LEVELS OF SUPERVISION:

<u>Organization Structure:</u>
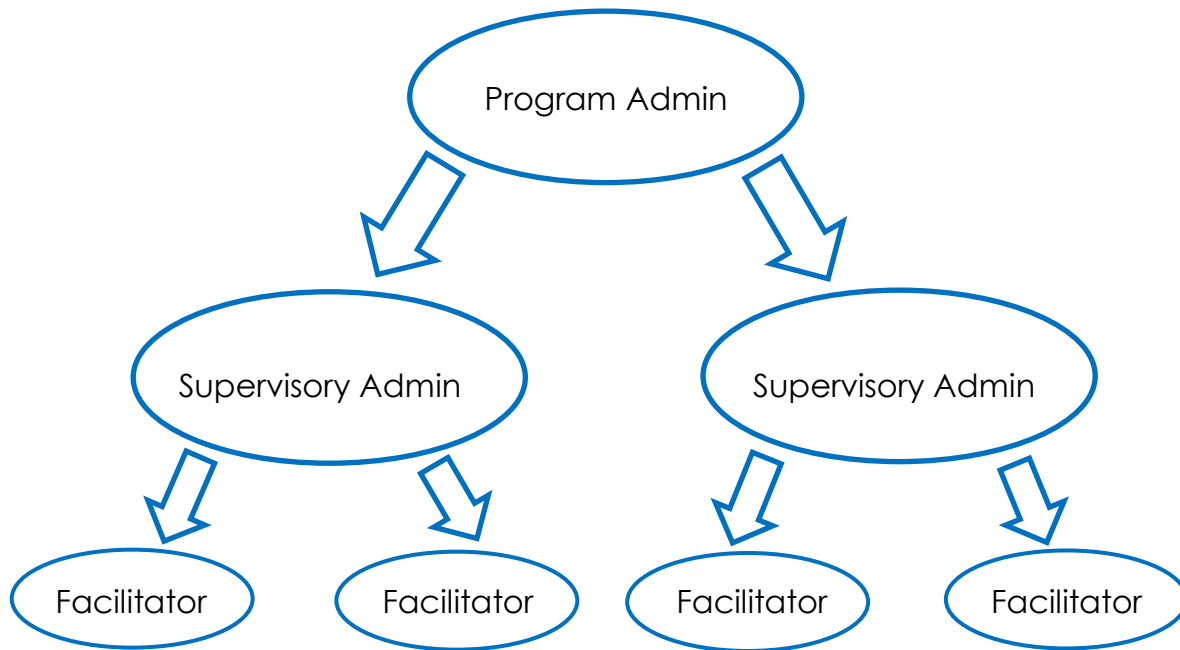
```
                    ┌─────────────────┐
                    │  Program Admin  │
                    └─────────────────┘
                      ↙             ↘
        ┌───────────────────┐   ┌───────────────────┐
        │ Supervisory Admin │   │ Supervisory Admin │
        └───────────────────┘   └───────────────────┘
          ↙        ↘               ↙        ↘
   ┌───────────┐ ┌───────────┐ ┌───────────┐ ┌───────────┐
   │Facilitator│ │Facilitator│ │Facilitator│ │Facilitator│
   └───────────┘ └───────────┘ └───────────┘ └───────────┘
```

3. HIERARCHY. Define the **Hierarchy** (*Supervision*) of **User Roles** for each Organization**:**

Org 1: __**New Org. A**_____

Role(s):
__**Program Admin**_____

Supervises Role(s):
__**Supervisory Admin**_____

Supervises Role(s):
__**Facilitator**_____

Supervises Role(s):
_____

Org 2: _____

Role(s):
_____

Supervises Role(s):
_____

Supervises Role(s):
_____

Supervises Role(s):
_____

Org 3: _____

Role(s):
_____

Supervises Role(s):
_____

Supervises Role(s):
_____

Supervises Role(s):
_____

All staff are employed in one Organization. **ProgramAdmin** User has access to all Youth data.

TWO ORGANIZATIONS, ONE OVERALL SUPERVISOR, TWO LEVELS OF SUPERVISION WITHIN ORGANIZATIONS:

Organization Structure:

3. HIERARCHY. Define the **Hierarchy** (*Supervision*) of **User Roles** for each Organization:

Org 1: ___New Org. A___

Role(s):

Program Admin
_____

Supervises Role(s):

Supervisory Admin
_____

Supervises Role(s):

Facilitator
_____

Supervises Role(s):

_____

Org 2: ___New Org. B___

Role(s):

_____

Supervises Role(s):

Supervisory Admin
_____

Supervises Role(s):

Facilitator
_____

Supervises Role(s):

_____

Org 3: _____

Role(s):

_____

Supervises Role(s):

_____

Supervises Role(s):

_____

Supervises Role(s):

_____

One main Organization, supervising other Organizations. **ProgramAdmin** User has access to all Youth data.

THREE ORGANIZATIONS, WORKING COOPERATIVELY, THREE LEVELS OF SUPERVISION IN EACH ORGANIZATION.

Organization Structure:

Org. A

Program Admin → Supervisory Admin → Facilitator, Facilitator

Org. B

Program Admin → Supervisory Admin → Facilitator, Facilitator
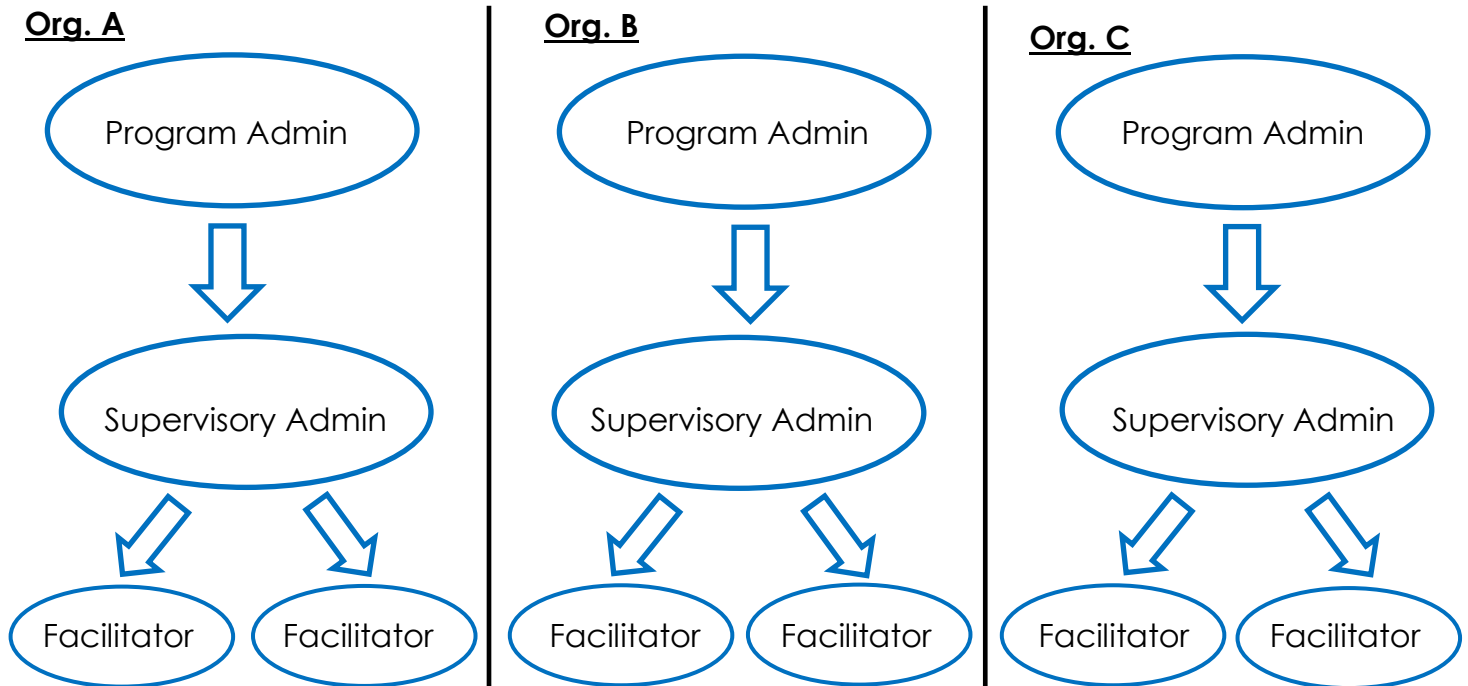
Org. C

Program Admin → Supervisory Admin → Facilitator, Facilitator

3. HIERARCHY. Define the **Hierarchy** (*Supervision*) of **User Roles** for each Organization:

Org 1: __New Org. A__

Role(s):
__Program Admin__

Supervises Role(s):
__Supervisory Admin__

Supervises Role(s):
__Facilitator__

Supervises Role(s):

_____

Org 2: __New Org. B__

Role(s):
__Program Admin__

Supervises Role(s):
__Supervisory Admin__

Supervises Role(s):
__Facilitator__

Supervises Role(s):

_____

Org 3: __New Org. C__

Role(s):
__Program Admin__

Supervises Role(s):
__Supervisory Admin__

Supervises Role(s):
__Facilitator__

Supervises Role(s):

_____

Three separate Organizations working cooperatively. **ProgramAdmin** User has access to all Youth data *in their Organization*, and only Youth data in other Organizations where subordinates are added to **Team**.

APPENDIX B. **WRAPTRACK PERMISSIONS** *Spring, 2014*	**USER ROLE HIERARCHY** *Highest <--* *--> Lowest*					
-Tab *--Group* *---Permission*	Config Admin	State Admin	Jurisdictional Admin	Program Admin	Supervisory Admin	Team Members
-Admin						
--Organization						
---Add an Organization	X	X	X	--	X	--
---Edit Existing Organization	X	X	X	X	X	--
---Delete an Organization	X	X	X	--	X	--
--Permissions						
---Edit Role Permissions	X	X	X	X	X	--
--Roles						
---Add New Roles	X	X	X	X	--	--
---Edit Dynamic Role	X	X	X	X	--	--
---Inherit Basic Roles	X	X	X	X	--	--
--SearchSettings						
---Update Search Settings	X	X	X	X	X	X
--Users						
---Add New User	X	X	X	X	--	--
---Edit Existing User	X	X	X	X	X	--
--Youth Records						
---Disable Youth Record	X	X	X	X	X	--
---Delete Youth Record	X	X	X	X	X	--
-Enrollment						
---Create New Case Record	X	X	X	X	X	X
---Save Enrollment Requirements	X	X	X	X	X	--
-Home						
---Add an Dashboard Item	X	X	X	X	X	X
---Change Dashboard Setting	X	X	X	X	X	X
---Edit Dashboard Setting	X	X	X	X	X	X
---Remove Dashboard Item	X	X	X	X	X	X
-Youth Record						
--Assessments						
---Add Assessment for a case	X	X	X	X	X	--
---Edit Assessment for a case	X	X	X	X	X	--

APPENDIX B.						
WRAPTRACK PERMISSIONS						
Spring, 2014						

USER ROLE HIERARCHY

Highest <--   --> *Lowest*

-Tab *--Group* *---Permission*	Config Admin	State Admin	Jurisdictional Admin	Program Admin	Supervisory Admin	Team Members
---Delete Assessment for case	X	X	X	X	X	--
--Youth Demographics [Youth Record --> Youth/Family Tabs]						
---Edit Youth Info	X	X	X	X	X	--
---Add Family Member Info	X	X	X	X	X	--
---Edit Family Member Info	X	X	X	X	X	X
---Delete Family Member Info	X	X	X	X	X	--

*This chart shows the Default Permissions for each User Role. Permissions can be modified by a Configuration Administrator to meet the needs of a particular System.

APPENDIX C. WRAPTRACK GLOSSARY

Admin Button – The *Admin* button is located on the Menu navigation bar. Select "Administrative Tool" in order to access your Users, Permissions, Roles, Youth Records, and Organization tabs. These tabs all have separate administrative functions, described in the manual. If you Select "Configuration Settings" you will be able to adjust the Enrollment Search Results (if you have those permissions as a user). UW WERT suggests leaving the selections currently checked.

Business Rules – These rules relate to systems logic for WrapTrack. *Business Rules* tend to be inflexible in nature.

Configuration – This is the term for your agency or community. A *Configuration* is the setup of each group collaborating with UW WERT.

Configuration User / Administrator - This account is responsible for setting-up the *Organizations*, *Roles* and *User Accounts* within the Configuration. The *Configuration User/Administrator* can add sub-sites (organizations) in WrapTrack – but please be reminded – there are <u>additional fees for each sub-site</u>, *see Organization*.

Hierarchy – The structure of your organization is called the *Hierarchy*. This is the structure of each Configuration's User Roles. It is important to setup the *Hierarchy* of users prior to entering data.

Organization – Equivalent to what UW WERT used to call "sub-site". *Organizations* can be added to a *Configuration* using the Admin Button. Please keep in mind that invoicing amount will change if *Organizations* are added to WrapTrack. The Center for Commercialization (C4C) will need to be notified of any additional *Organizations* beyond what is the current collaborator agreement for each *Configuration*.

Permissions – Determine which functions a user has access to in the *Configuration*. The *Permissions* are flexible and a *Configuration Administrator* can determine which users have access to data entry, reporting/exporting, and editing youth records.

User Roles – The types of users within the *Configuration*. If additional roles are required, use the *Admin* button and navigate to "Administrative Tool", then select the Roles tab and "Basic Roles". Please keep in mind that these roles and

permissions are flexible to meet the needs of each individual group. If a *Configuration* is unclear on how to move forward, please contact someone from the UW WERT team for advice on setting up *User Roles* within the restrictions of a *Hierarchy*.

Dynamic User Roles – Can create any number of *Dynamic User Roles*, should your Organization use different language for your Users. These roles will have the same permissions as the *Equivalent User Roles* but can be re-labeled to something that is more appropriate for your community.

Equivalent User Roles – When you create a new *Dynamic User Role*, you must identify the *Equivalent User Role* from the list of existing Roles. The Default Permissions and availability of Supervisors/Supervisees will be determined from your selection.

Types of User Roles:

> **Configuration Administrator –** See above definition. This role is designed to maintain other *User Roles*, access all data, assign permissions, and help answer WrapTrack questions.

> **Jurisdictional Administrator –** For past WONDERS users, this role is equivalent to the local head. This role is able to access the same administrative *Privileges* as the Configuration Administrator, but does not have access to all of the records. This role should be used if more than one person should have Configuration Administrator –like privileges, as only one person can be in the *Configuration Administrator* role.

> **Program Administrator –** It is up to the Configuration Administrator to determine which staff fit into which User Roles. Please see examples embedded within the manual. This role could be assigned to as supervisor or person pulling reports/exports.

> **Supervisory Administrator –** Similar to the above description. This role could be assigned to a supervisor or person entering WFI-4, WFI-EZ, or TOM data.

> **Team Member –** This role would best be assigned to someone only enter data into the system.