Spring 2023

WellSky Human Services

Getting Started with WellSky Human Services

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Note that the terminology used in this document references the standard out-of-the-box tab and field names. Your application may have different names based on how it was configured during the implementation process.

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version 8.7.3

Contents

Getting Started with WellSky Human Services

WellSky Human Services is a web-based application built to assist you and your organization in meeting your mission-critical goals. WellSky Human Services is available in many different configurations, or solutions. For example, some clients use WellSky Human Services for Waivers or WellSky Human Services for APS. This guide will introduce you to the basic functions you need to start using the application for any of the available solutions.

To get started working with WellSky Human Services, you will need to know how to complete the following tasks:

- Log into and out of the application
- Change your password
- Navigate to different parts of the application
- Understand field formatting
- Search records and use search filters

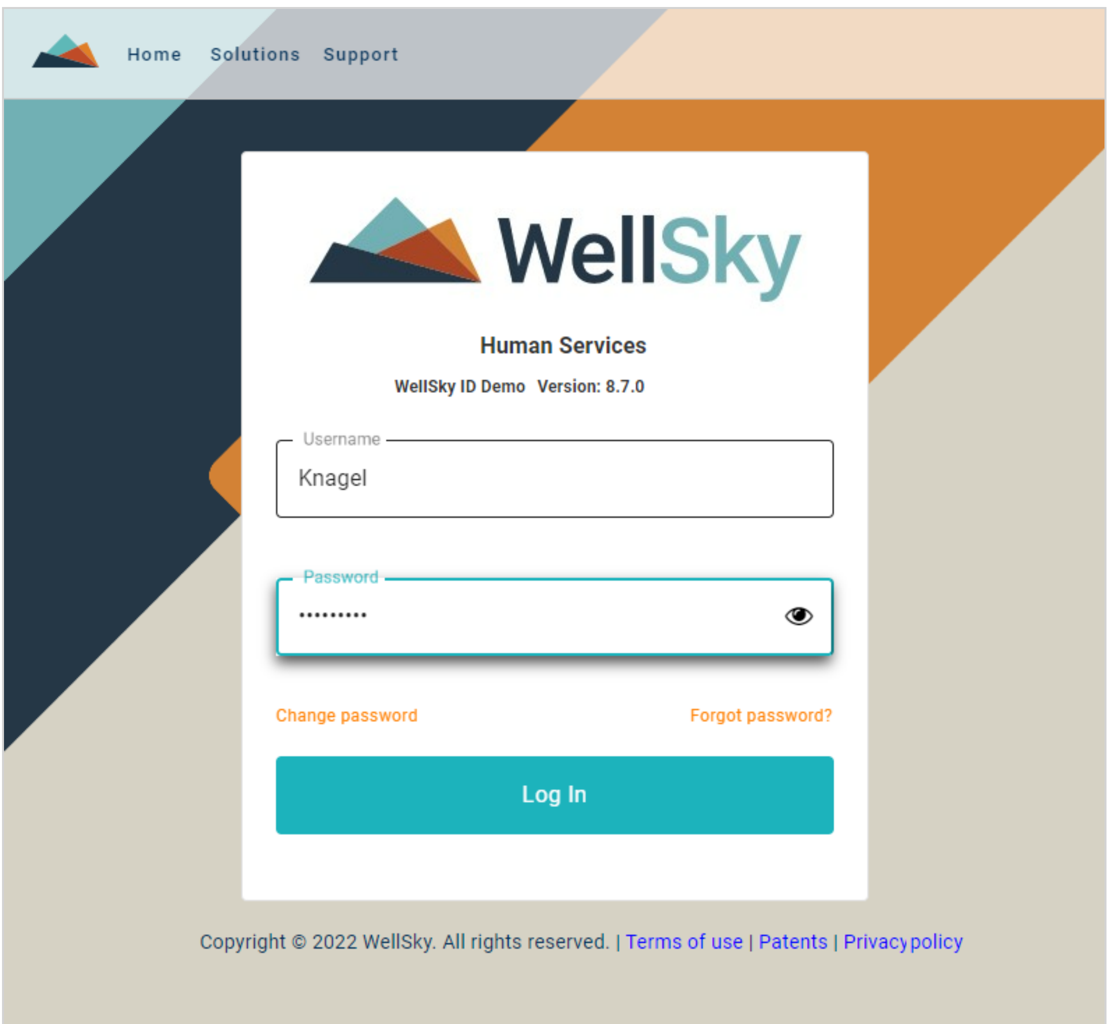
Log in to WellSky Human Services

To open WellSky Human Services, use your internet browser to open the application URL. Your system administrator can give you the URL for your Human Services implementation and your user name and first password.

You can change your password after logging in for the first time. It's important to use only your own user id and to keep your password secure. Your user id gives you specific permissions to view and work in areas of the application.

To log in to WellSky Human Services

1. Open the URL provided for WellSky Human Services. The login screen opens.



2. Enter your **User ID** and **Password**.
3. Click **Login**. The My Work page chapter opens.

Note: If you are logging in to WellSky Human Services for the first time, you may be required to change your password. Read Changing your password below.

Changing your password

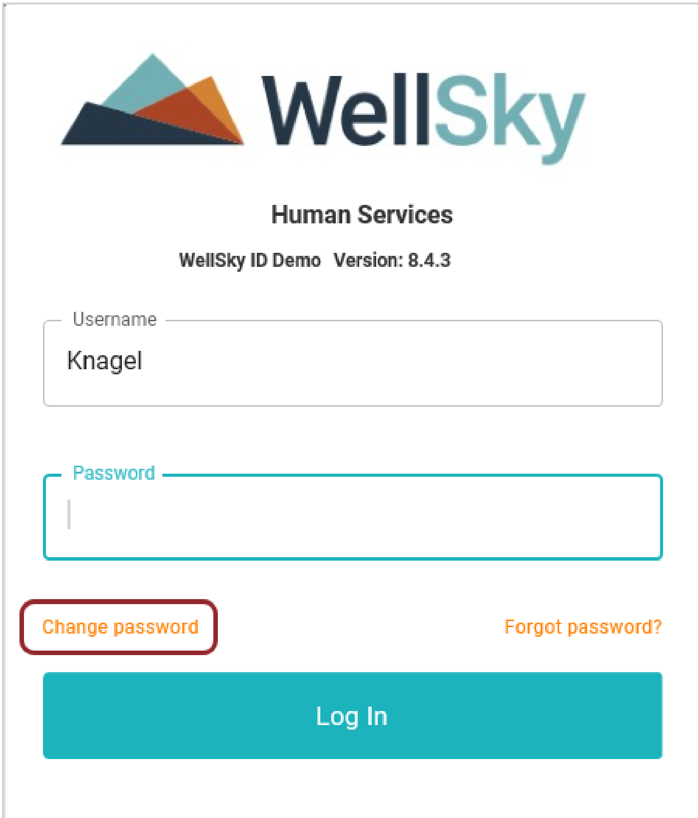
You may be required to change your password the first time you log in to WellSky Human Services and on a regular basis thereafter. The password requirements in place for WellSky Human Services are determined by the system administrator. Typical password requirements include the following:

- A minimum number of characters
- Upper case and lower case characters
- Digits
- Special characters

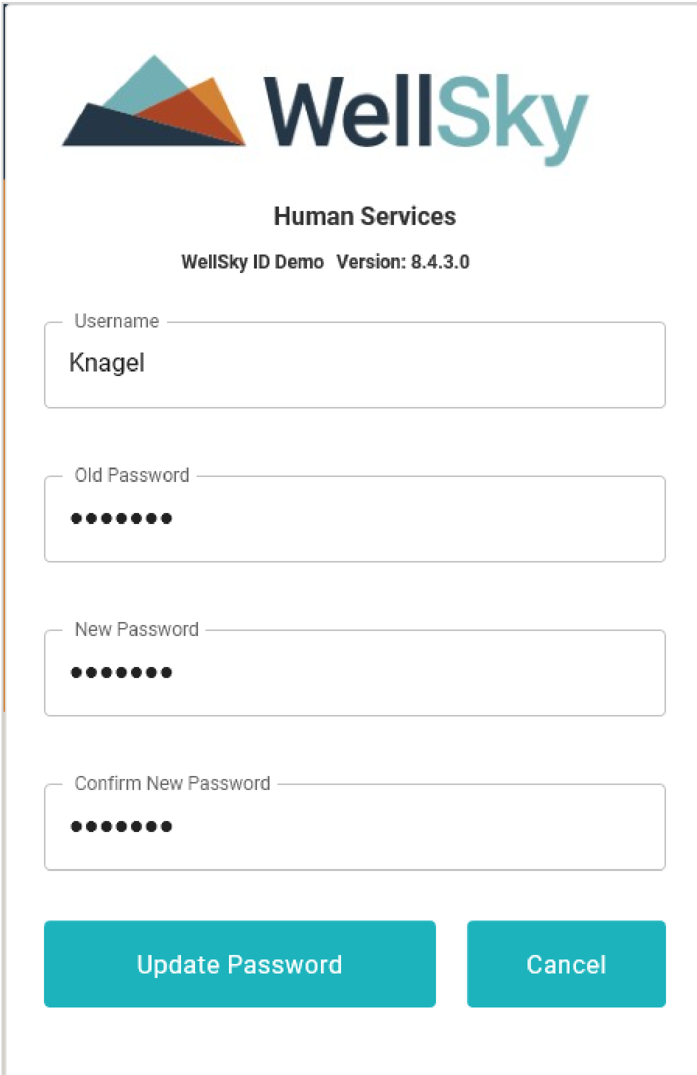
Note: Contact your system administrator if you have been locked out of WellSky Human Services and cannot use the Forgot Password? link. See Resetting your forgotten password on page 5 for more information.

To change your password

1. Open the URL provided for WellSky Human Services. The login screen opens.



2. Click the **Change your password** link. The login page expands to show options to change your password.



3. Type your **User ID** and **Old Password.**
4. Type your **New Password** and then again to **Confirm New Password**.
5. Click **Update Password**. If your user profile includes an email address, you will receive an email message confirming that you have changed your password.

Resetting your forgotten password

You can reset your password if you forget it. You'll need to correctly answer your security questions to reset your password, so make sure you've set those up.

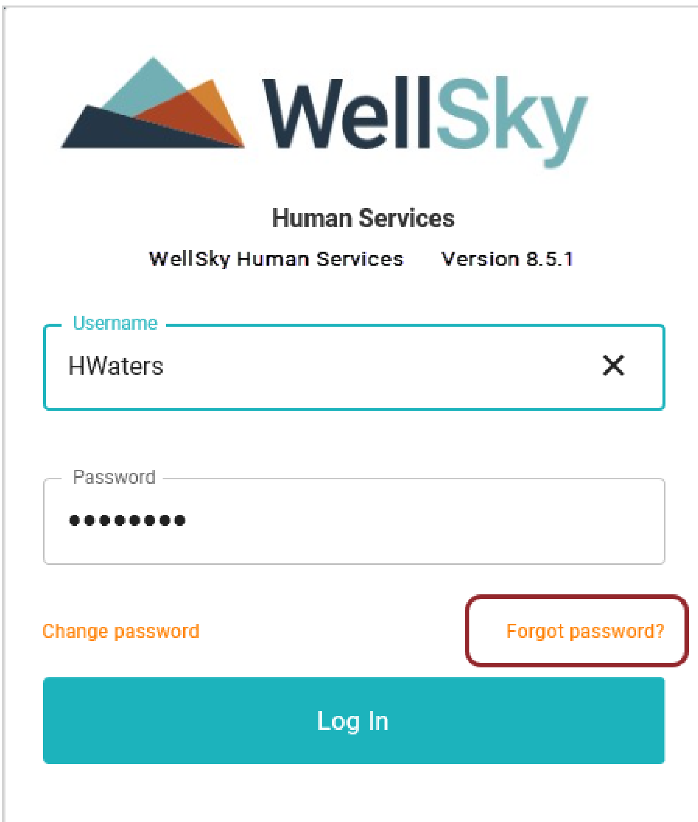
The password requirements in place for WellSky Human Services are determined by the system administrator. Typical password requirements include the following:

- A minimum number of characters
- Upper case and lower case characters
- Digits
- Special characters

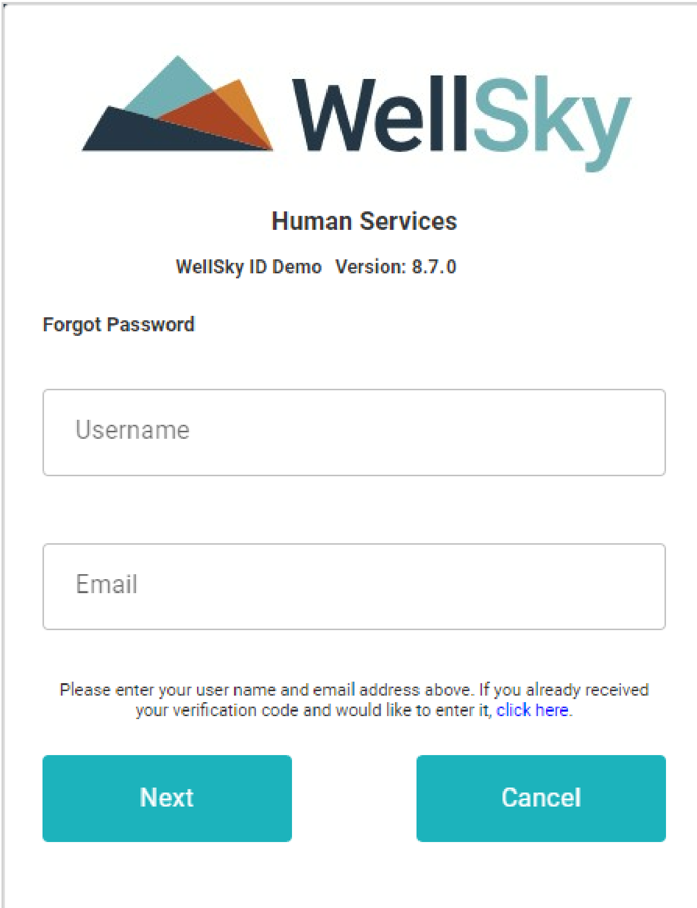
> Note: If you can't use the Forgot Password link to successfully reset your password, your system administrator can reset it for you.

To reset your forgotten password

1. Open the URL provided for WellSky Human Services. The login page opens.

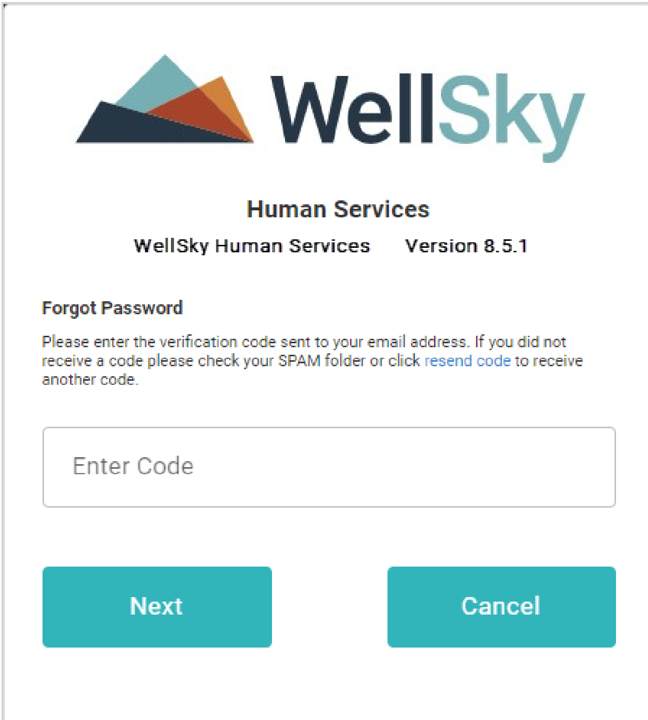


2. Click the **Forgot password** link. The Forgot Password page opens.
3. The click here link allows you to enter the verification code if you received a code but closed the application window without successfully using the code to reset your password.



Note: The click here link allows you to enter the verification code if you received a code but closed the application window without successfully using the code to reset your password.

4. Type your **User ID** and **Email Address.** Click **Next**. A six-digit security code will be sent to your email address. The login page updates to show an entry box for the security code.



5. Enter the security code you received by email and click **Next**. One of your security questions appears.

6. Type your security question response and click **Next**.

   - If the response is incorrect an error message appears. Click Cancel to return to the log in page.

   - If the response is correct, the next page shows options for setting a new password.

7. Type your **New Password** and then again to **Confirm New Password**.

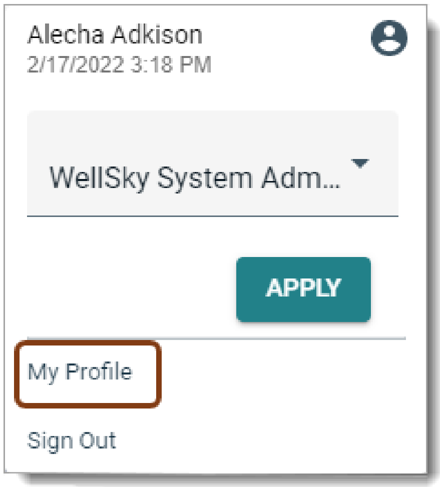
8. Click **Update Password.**

Saving or editing your profile

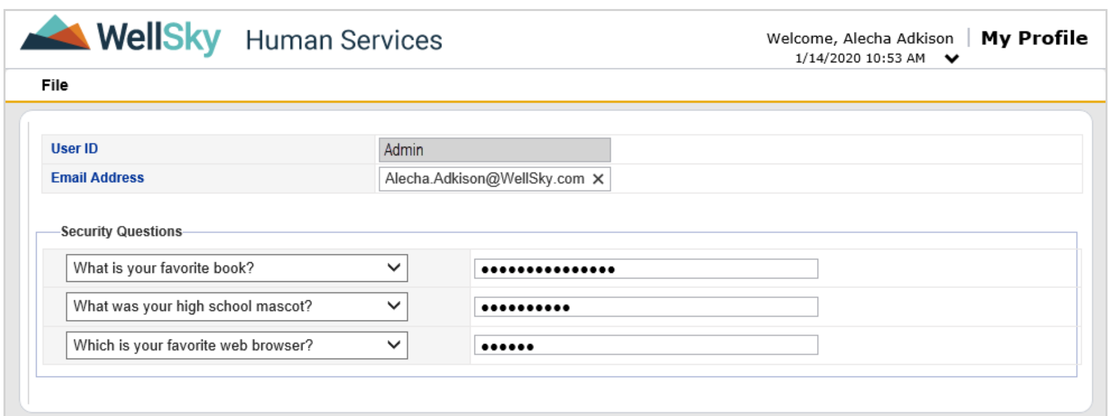
Your user profile stores your email address and your security questions with answers. This information is important. If you ever forget your password, you will use your email address and security questions to reset it.

To save your profile

1. Click the profile icon ( ) in the application header to open the user profile pop-up. Select the My Profile link. The My Profile page opens.



2. Complete your profile information. This is the information you'll need if you forget your password and need to reset it.
   - Enter your **Email Address**. When you update your email address on this page, it also updates in your worker record and in the Users Setup utility.
   - Select **Security Questions** and complete the **responses**. These questions will be presented in random order when you use the *Forgot Password?* link.

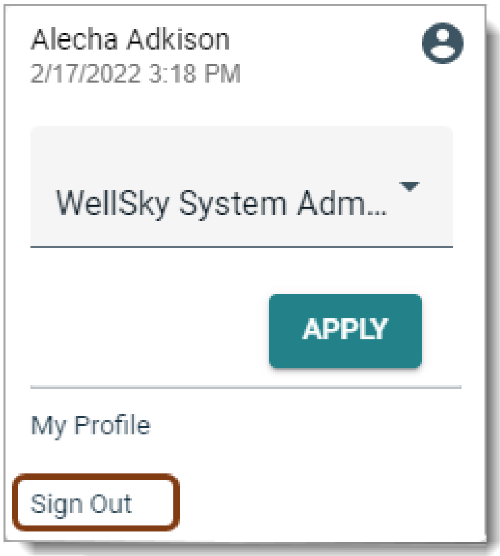


3. Select **Save and Close My Profile** from the **File** menu.

Sign out of WellSky Human Services

To sign out of WellSky Human Services

1. From the upper-right portion of the screen, click the profile icon ( ) to open the profile pop-up.

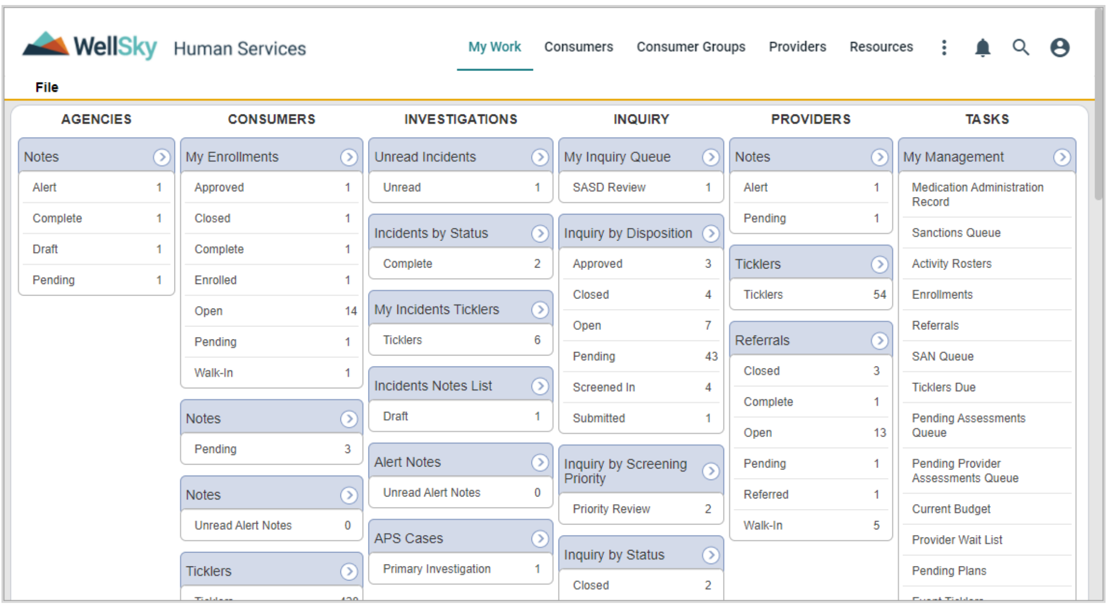


2. Click **Sign Out.**

Navigating WellSky Human Services

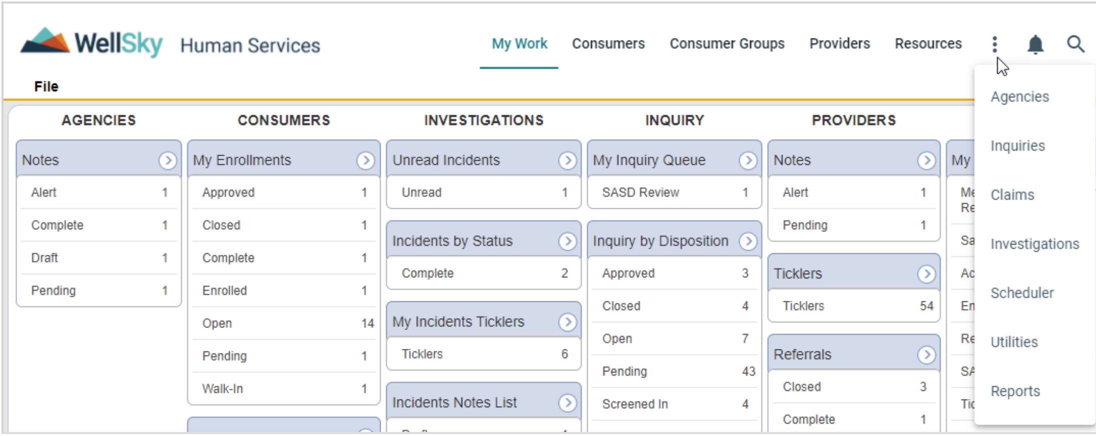
When you log in to WellSky Human Services, the first page that you will see is the My Work desktop. From this page you can change your user role, search for records, open a specific chapter, or navigate to sections on the My Work desktop.

The My Work desktop gives you quick access to records that have been assigned to you. My Work is the first page you see when you log in to WellSky Human Services. Like other chapters and pages in WellSky Human Services, the information available on the My Work desktop is configured for your current role. Your My Work desktop may be configured differently than the desktop for other user roles.



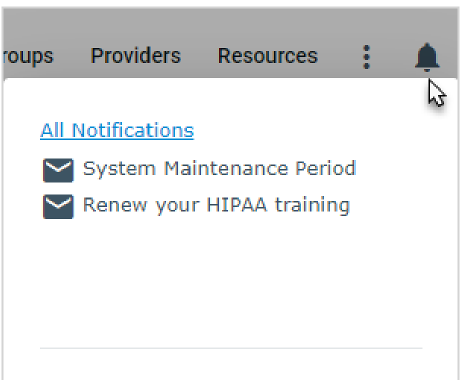
Using the chapter bar

The chapter bar displays the solution chapter names across the top of the screen. When not all of the chapter names can display in a single row, use the expansion icon (⋮), shaped like three vertical dots to display additional chapter names. Select a chapter name to navigate to that chapter.



Viewing notifications

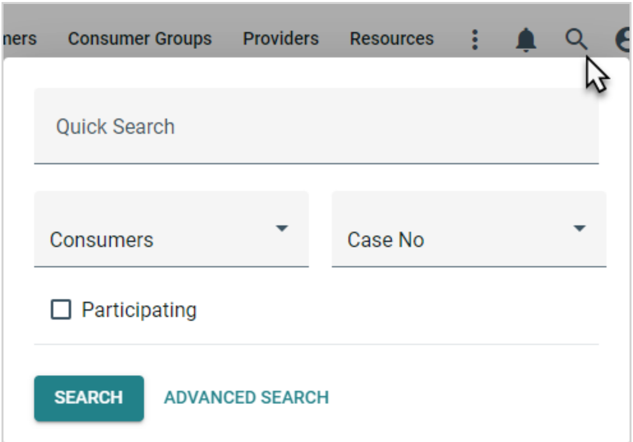
Select the notification icon ( ), shaped like a bell to view notifications for the current user role.



See Viewing notifications on page 14 for more information.

Using quick search

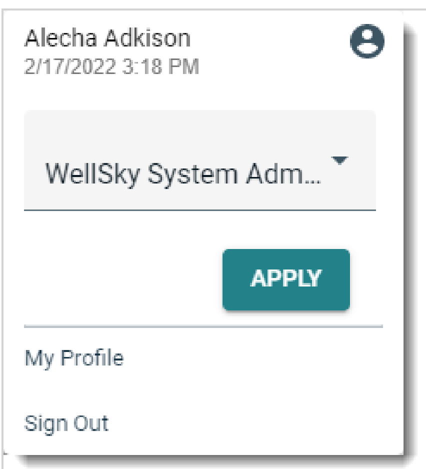
Select the search icon ( ), shaped like a magnifying glass to open the Quick Search pop-up.



See Searching for records on page 28 for more information.

Selecting your role and managing profile information

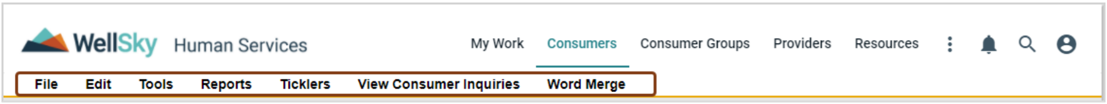
Select the profile icon () to access your current role and profile information. This pop-up also displays the current user name, date, time, and the Sign Out link.



See Changing roles on page 1 and Saving or editing your profile on page 8 for more information.

Using menus

The menu bar is visible near the top of the page under the application logo. The menu bar contains a set of menu items that allow you to access functions related to the current record. The items in the menu bar are specific to the current page, so you won't always see all the same options.



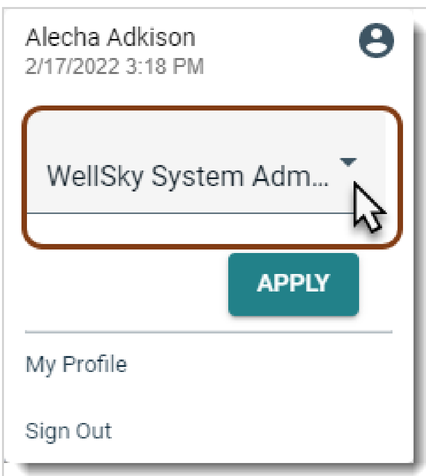
Changing roles

Your user role defines which chapters and pages in WellSky Human Services you can work with, which consumer records you can see, and what type of changes you can make while working in the application. You may have access to more than one user role. You can switch roles while staying logged in as you work.

To switch roles

1. From the upper-right portion of the screen, click the profile icon () to open the profile pop-up.

2. From the Role menu, select the user role you want to use.



3. Click **Apply**. The page refreshes to show you the user role configuration.

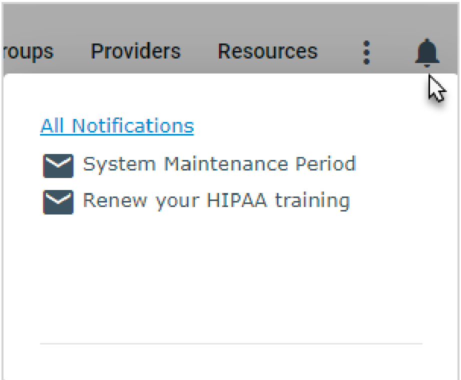
Viewing notifications

System notifications are messages that your system administrator can create to share timely information with application users. To view notifications, click the notification icon (), which is shaped like a bell, in top right-hand side of the page.

You can acknowledge notifications when you're ready to remove them from your notifications list.

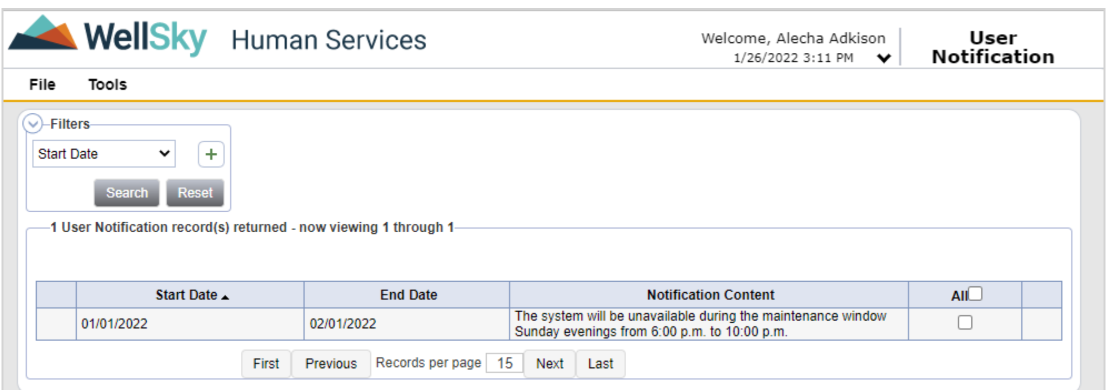
To view notifications

1. Click the notification icon ( ), which is shaped like a bell, in top right-hand side of the page. The notification pop-up opens, displaying a preview of each current notification.



> **Note:** The notification pop-up displays the notification subject line. Hover over a notification to view the notification content.

2. To view more details, click the **All Notifications** link. The User Notification list view page opens.



3. To acknowledge the notification, select the check box at the end of the notification row and then select **Acknowledge Notification** from the **Tools** menu. Notifications you have acknowledged are no longer displayed in the notification pop-up or the User Notification list view page.

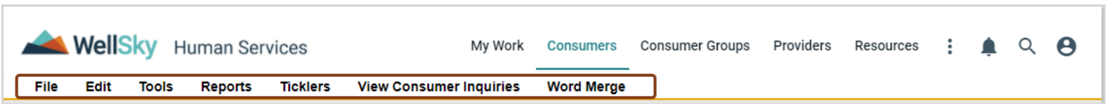
4. From the **File** menu, select **Close User Notification**.

Using menus

The menu bar contains a set of menu items that allow you to access functions related to the current record. The items in the menu bar are specific to the current page, so you won't always see all the same options.

The menus give you access to additional page functions, such as saving a record or closing the window. Different roles may have permission to view different functions.

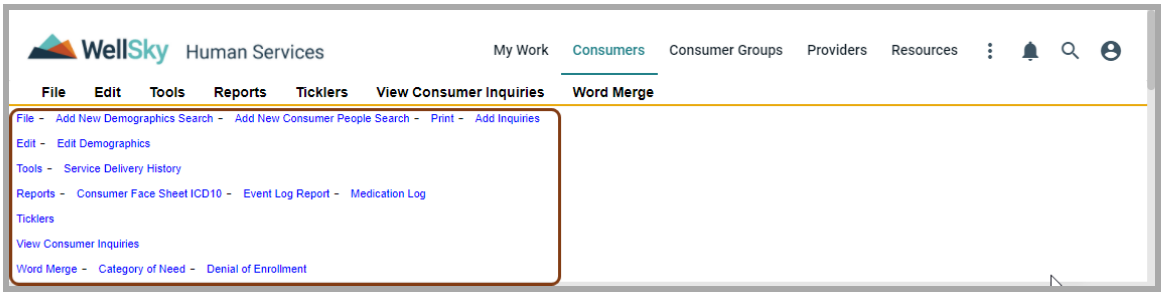
The File menu header is always visible at the top of the page. Other menus are available on pages as they are needed. The menu options available may differ from one user role to another.



- File — Add new records, save open records, print, and view history changes.
- Edit — Make changes to the current record.
- Tools — Complete additional tasks associated with the current page
- Reports — View reports associated with the current chapter and page. The available reports may differ from one user role to another.
- Tickers — View ticklers associated with the current record
- View Consumer Inquiries — View inquiry records associated with the current record.
- Word Merge — Create Microsoft Word documents that include information from the current record, such as the consumer name and address.

ADA menus

WellSky Human Services can be configured to include text menus that are always visible on the screen. These are called the Enhanced American Disability Act (ADA) menus. The Enhanced ADA menu items act in the same manner as those located in the menu bar.

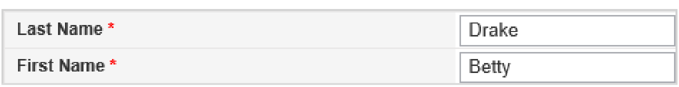


Using field types

The information you record in WellSky Human Services is saved in fields on pages. These fields are available as text boxes, option boxes, date fields, drop-downs, search fields, and multi-select boxes. Read below to learn more about using the different types of fields.

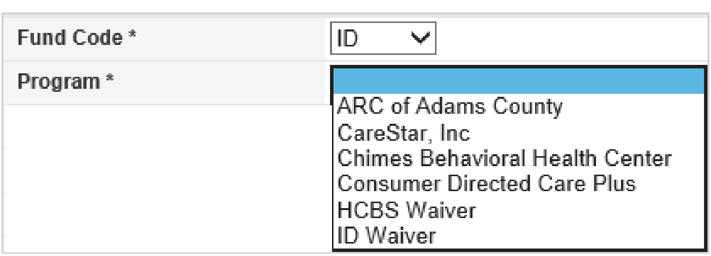
Required fields

Required fields are marked with a red asterisk (*). You will have to complete all required fields before you can save the current record.



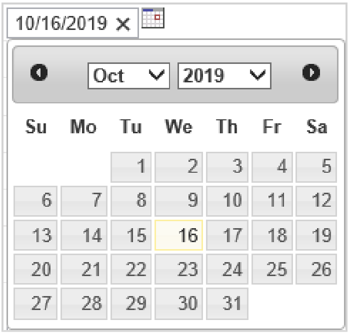
Linked fields

Linked fields are marked with a black asterisk (*). A linked field is a field with information linked to another field. The values in this field may change depending on what you select in the linked field. In the example below, the programs you can select are associated with the Fund Code selected in the previous field.



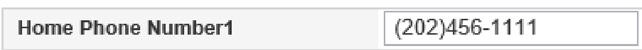
Date fields

Date fields include a pop-up calendar on the right-hand side. To complete the date field, type the date or click the popup calendar to select a date. If you choose to type the date, type only the numbers. The formatting is added for you.



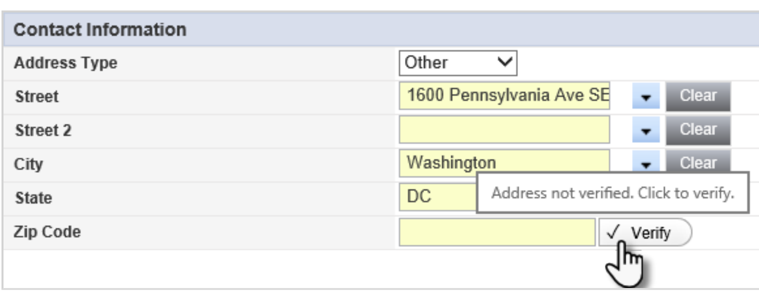
Formatted fields

Some fields add the formatting automatically. This includes date fields, phone numbers, and social security number fields. When you add information in these fields, type the numbers without added formatting. For example, when you are adding a phone number do not type parenthesis or dashes.



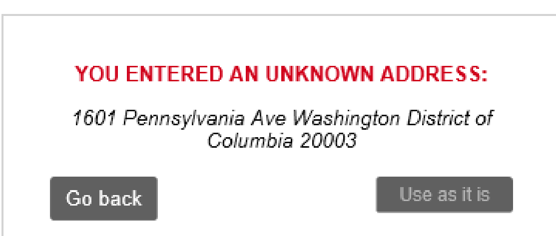
Address fields

Many address fields incorporate the Places feature. This feature links known address information to make data entry faster and verify addresses. Using the Places feature, if you type in a state, only cities and counties associated with that state are available in their address fields.



Address verification logic

Some implementations also enable address verification logic, which uses the Coding Accuracy Support System (CASS) to verify known addresses. When you enter an address on a page that uses the address verification feature, click Verify to check the address against known address combinations. If the address cannot be verified, an error message will appear.



Multi-select boxes

Multi-select box fields require that you select items from a list of available items and move them to a list of selected items.

Use the arrow buttons to move items from the list of available items to the list of selected items.

- Use the double right-facing arrows to move all items to the right-hand side of the multi-select box. These items are selected
- Use the single right-facing arrow to move the selected items to the right-hand side of the multi-select box. These items are selected.
- Use the single left-facing arrow to move the selected items to the left-hand side of the multi-select box. These items are not selected.
- Use the double left-facing arrows to mov eall items to the left-hand side of the multi-select box. These items are not selected.

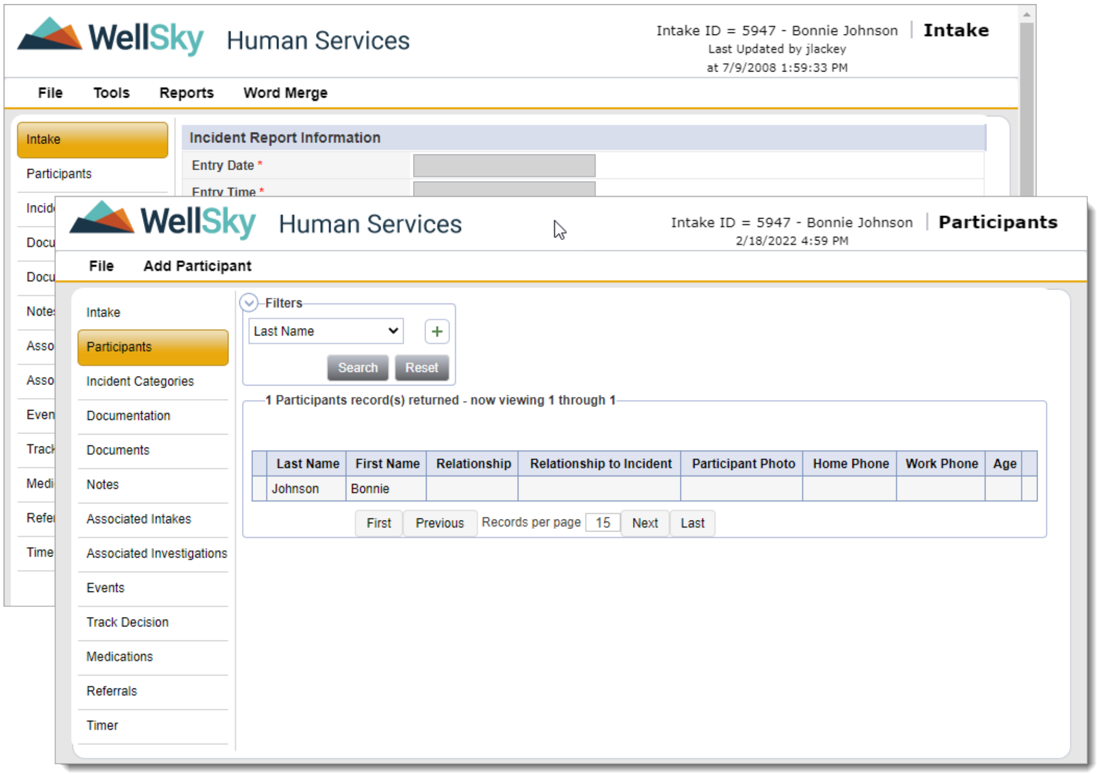
You can use the Shift and Control keys to select multiple items from this list.

- To select all sequential items in a list, click the first item, then hold down Shift and click the last item.
- To select multiple non-sequential items in a list, click the first item, then hold down Ctrl and click additional items.

Saving subpage data

WellSky Human Services saves record information when you select a Save option from the File menu. It's important to save the changes that you make on each page before you navigate to other pages or close the record.

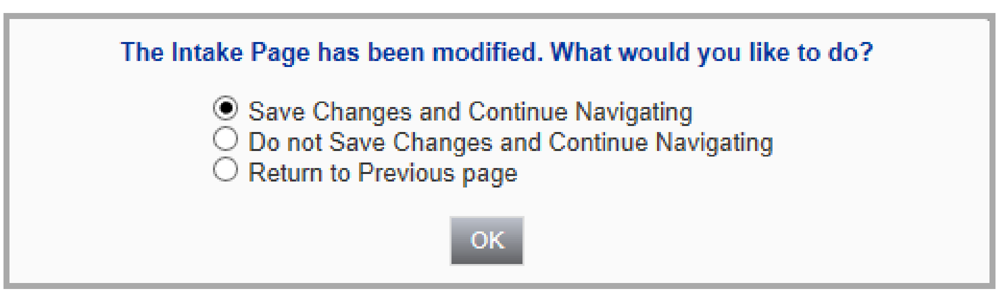
What's a subpage? A subpage is a page that you open from within another page. For example, the Intake details page includes a subpage called Participants. You can only open the Participants page from within the Intake page.



Save the information on a subpage before you navigate to another page. For example, when you enter information on the Intake and Investigation Details page and then attempt to switch to a subpage, a message will appear to remind you to save before navigating away from the page.

The Pop-Up Warning Message includes three options as follows.

- Save Changes and Continue Navigation — Save changes to the subpage and continue navigating.
- Do not Save Changes and Continue Navigating — Do not save changes to the subpage and continue navigating.
- Return to Previous page — Return to the page that was active before you started the navigation.



Important: Using the browser to close the page will not trigger the pop-up warning message. For example, if you select Close from the browser File menu or click the close button ("X") in the internet browser, you will not trigger the pop-up warning message. The window will close without saving data. Always use the menus in WellSky Human Services to save and close the current page.

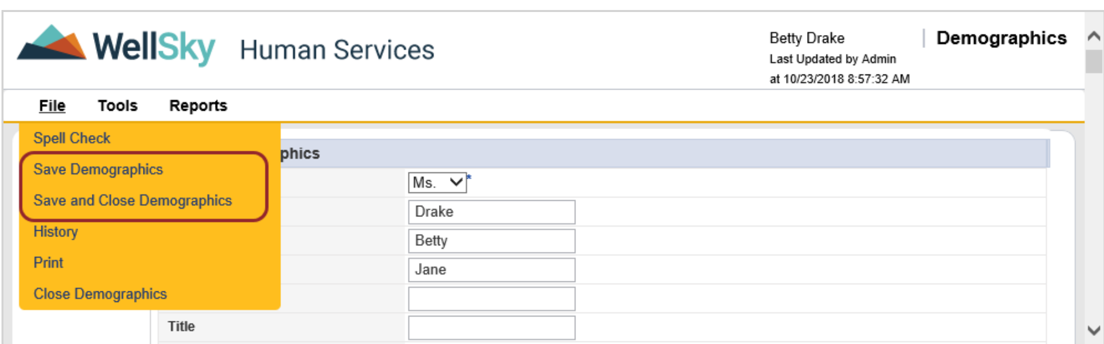
Working with multiple screens

While you work with WellSky Human Services, new pages open as you need them. The best practice is to always select Save and Close from the File menu when you finish working with each page. However, it is possible to have multiple pages open at the same time. Sometimes these pages are open as multiple tabs in the same browser window. It is possible to have application pages open as multiple, stacked windows. Most of the time this does not cause a problem. However, it can make working with the application cumbersome. If you allow multiple pages or tabs to remain open after you are finished working with them, the open screen can prevent you from navigating to another part of the application.

Saving data in WellSky Human Services

When you work in WellSky Human Services, it is important to use the application menus and tools instead of the browser controls.

Human Services only saves newly added information when you select **Save** or **Save and Close** from the application **File** menus.



To close an application page

1. From the **File** menu select **Save and Close** or **Close**. Do not use the browser close button [X] in the upper right-hand corner.

If you make changes to a record using a detail page and then select Close from the File menu without saving the changes, a warning message will display. This message reads as follows: "A change has been made. Are you sure you want to close without saving?"

- Select No to navigate back to the detail page and save the record.
- Select Yes to continue to close the page without saving.

> **Note:** To avoid losing data, you should always save your changes to a page before you close it or start working in a subpage.

An additional save reminder message can be configured for individual users. This message can be set up to remind the user to save an open detail page after 5 to 30 minutes.

Please contact your system administrator if you are interested in have this setting turned on for you.

Using spell check

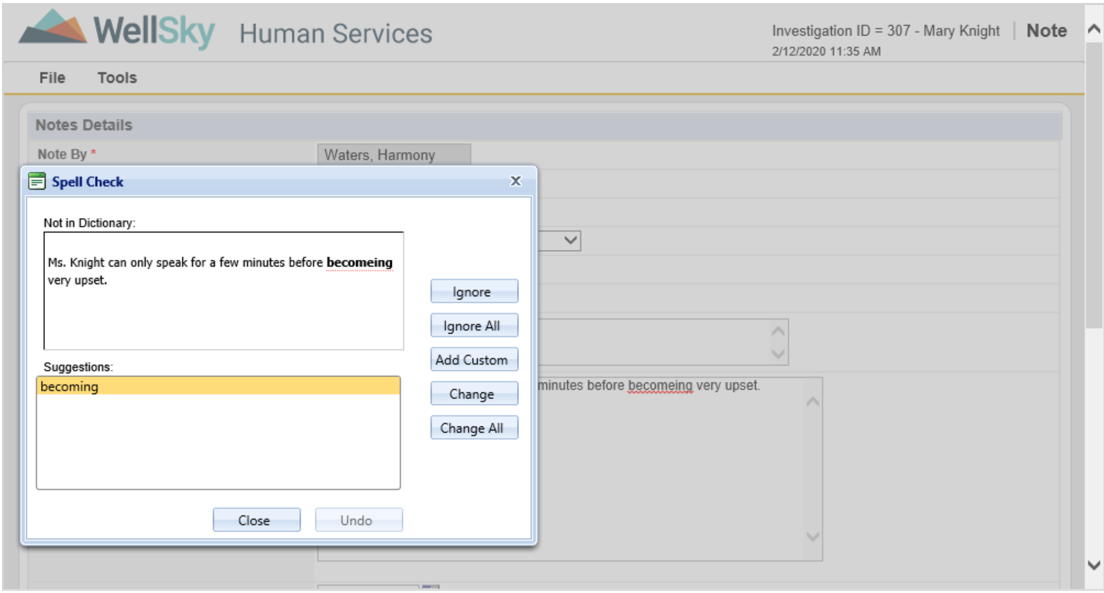
The spell check feature in WellSky Human Services becomes available when you are adding text to a page. This feature is available on pages that include comments, assessment forms, and notes.

When the spell check feature identifies unfamiliar or misspelled words, the following options will be available:

- **Ignore** — Ignore the word and leave it as is.
- **Ignore All —** Ignore the word every time you find it during this spell check session and leave it as is.
- **Add Custom —** Add the word to the custom dictionary of correctly spelled words. Use this option for words that are correct but unfamiliar to the spell check feature.
- **Change —** Change the word to the selected suggestion.
- **Change All —** Change the word to the selected suggestion **e**very time you find it during this spell check session

To run spell check

1. From the **File** menu, select **Spell Check**. The Spell Check popup appears.



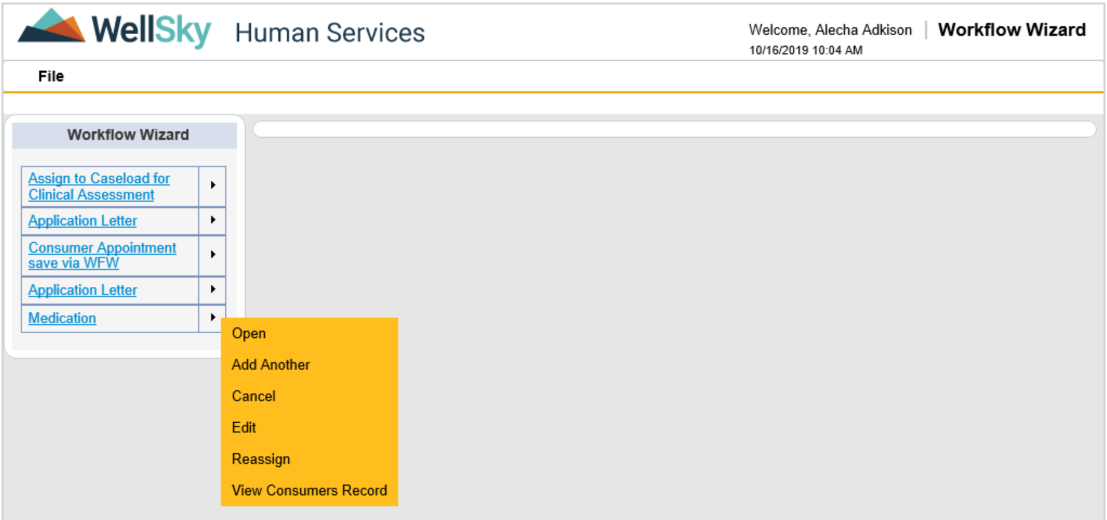
2. If the correct spelling is shown in the Suggestions box, select it and then click **Change** or **Change All**.
   - Click Close to close spell check without completing the check.
3. A confirmation message will appear when you have completed the spell check. Click **OK** to continue.

Using workflow wizards

Workflow wizards are like a task list of multiple events that complete a larger task. The individual tasks in the workflow wizard are ticklers. For example, when you add a new provider to the system, a workflow wizard will generate ticklers that remind users to add workers and services to the provider record. The worker and services information is important related information that will be necessary to assign the provider.

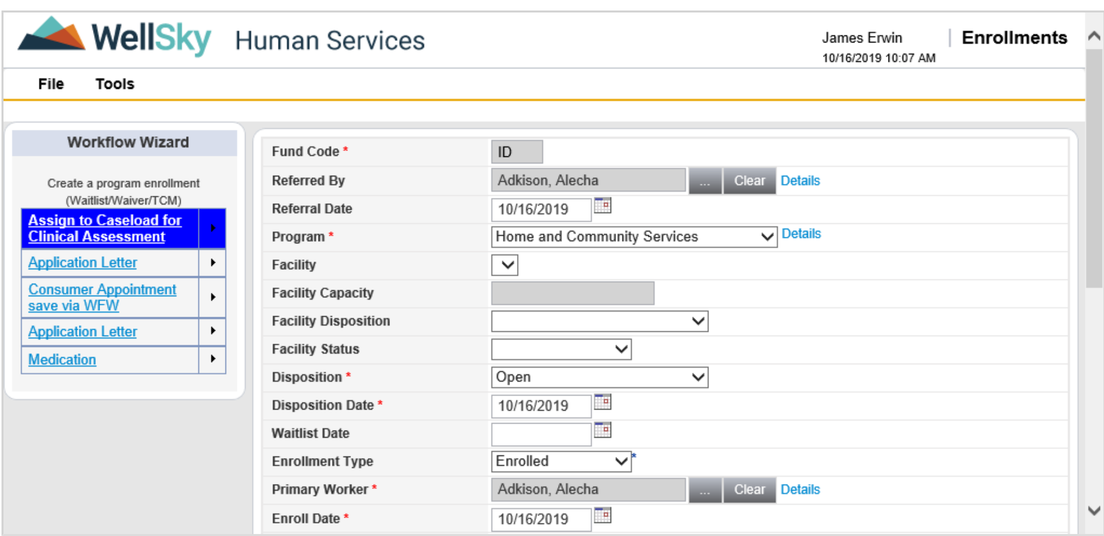
Workflow wizards open when you're required to complete follow-up tasks. For example, when you add a new consumer record. In the example shown below the Workflow Wizard opens because the user is required to complete several tasks after adding a new consumer record.

The small arrow at the end of the task row is a fly-out menu. Click the fly-out menu to view options for working with the task.

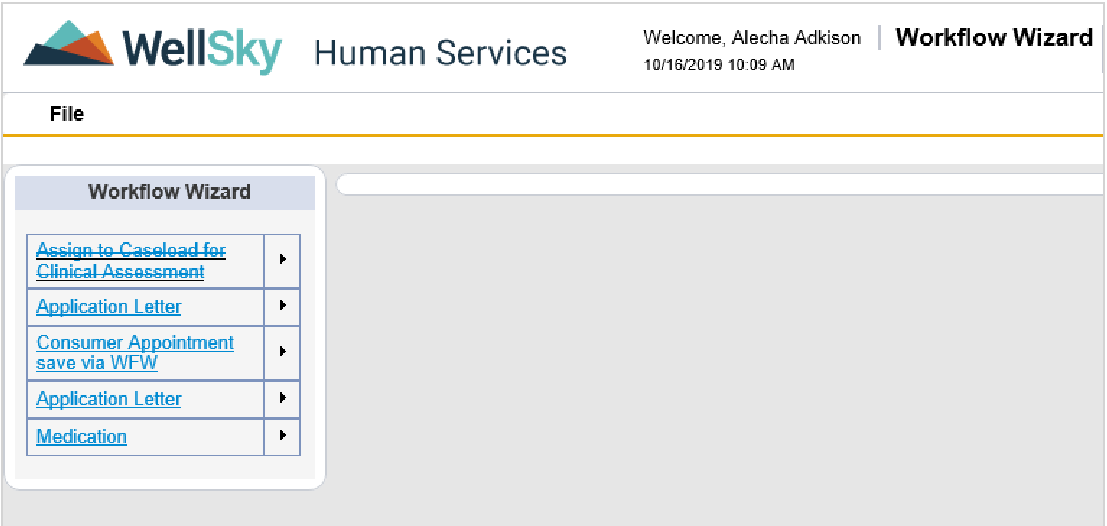


- Open — Open the associated task. In this case, a note record.
- Add Another — Add another associated record. In this case, you would add another note.
- Cancel — Cancel the associated task. The task name will appear in red strikethrough text.
- Reassign — Assign the associated task to another user.
- View Consumer Record — View the associated consumer record. If your current user role does not have permission to view the record a message appears instead of the record.

When you select Open or click the task name in the Workflow Wizard pane, the associated task will open. In the example shown below the Enrollment page opens.



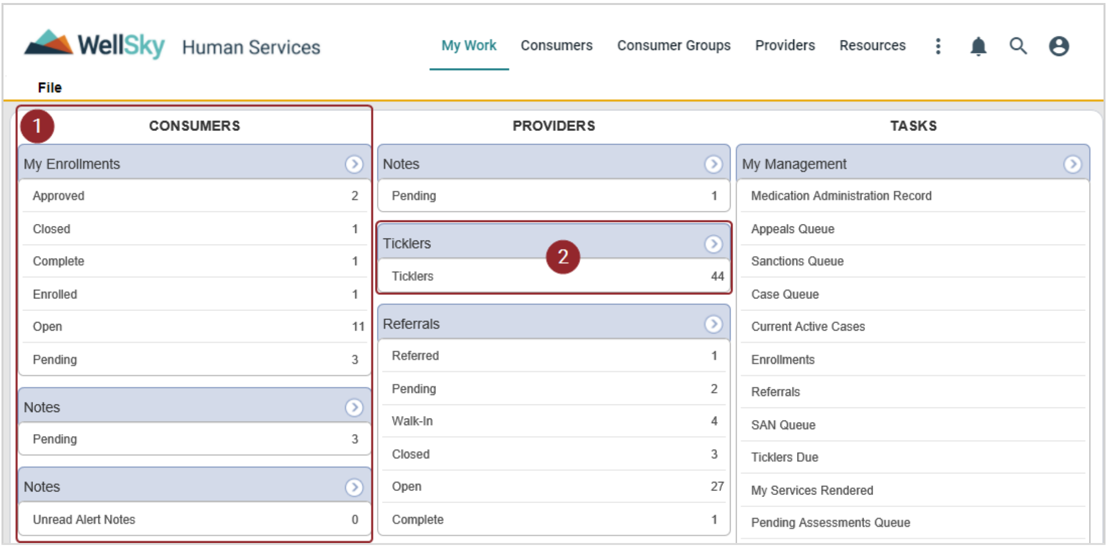
When you complete a task required by the Workflow Wizard, the task name is shown in strikethrough text to show that step is complete.



Note: When you complete an assessment form using a tickler or workflow wizard the task is marked as complete in the tickler or workflow wizard. The status of the assessment or form may remain as pending. To mark the assessment status as complete, you will have to open the assessment in the consumer record, finish completing the assessment, and then change the status to complete.

My Work

My Work is the first page that opens when you log in to WellSky Human Services. This page gives you quick access to the records and tasks assigned to you. Your My Work desktop might differ from your coworkers who have different user roles. This desktop will also change based on the role that is active because it is configured for each user role.



1. My Work is divided into **sections** for different types of work: agencies, consumers, providers, resources, intakes, investigations, and tasks. You will see the sections that relate to your tasks and your current user role.

2. Within each section are **panes** -- boxes of information with links to records and tasks. The number of related links is shown next to the row. For example, the Ticklers pane shown here includes 44 ticklers.

   Each pane includes an arrow that you can use to collapse or expand the pane. When the arrow faces right the pane is expanded. When the arrow faces down, the pane is collapsed. Click the arrow once to collapse the pane and a second time to expand it.

Opening a tickler from My Work

Ticklers are the individual tasks that workers are prompted to complete when an event occurs. Ticklers remind users to complete a screen, fill out a form, or perform some other action. A Ticklers pane may be found in more than one section of My Work. You may see a Ticklers section in the Consumers, Providers, Tasks, or Intake sections.

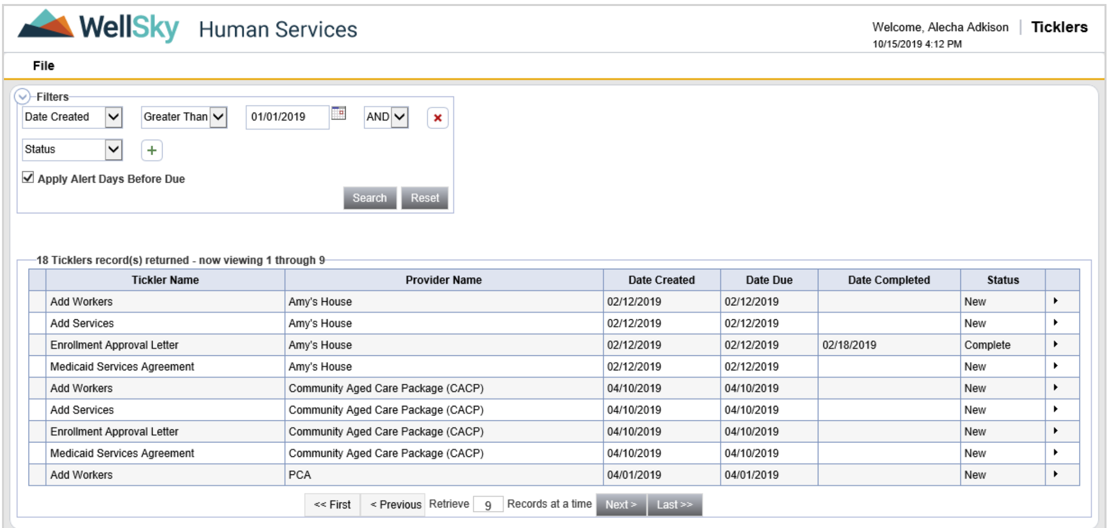
Ticklers are associated with Workflow Wizards (WFWs).

You can also open ticklers from the specific chapter. For example, you can open ticklers from the Consumers chapter.

To open a tickler from My Work

1. Click the **Ticklers** link in the section you are working with.

2. The Ticklers list view page opens. If needed, use the filters to locate the tickler.



Tickler Name	Provider Name	Date Created	Date Due	Date Completed	Status
Add Workers	Amy's House	02/12/2019	02/12/2019		New
Add Services	Amy's House	02/12/2019	02/12/2019		New
Enrollment Approval Letter	Amy's House	02/12/2019	02/12/2019	02/18/2019	Complete
Medicaid Services Agreement	Amy's House	02/12/2019	02/12/2019		New
Add Workers	Community Aged Care Package (CACP)	04/10/2019	04/10/2019		New
Add Services	Community Aged Care Package (CACP)	04/10/2019	04/10/2019		New
Enrollment Approval Letter	Community Aged Care Package (CACP)	04/10/2019	04/10/2019		New
Medicaid Services Agreement	Community Aged Care Package (CACP)	04/10/2019	04/10/2019		New
Add Workers	PCA	04/01/2019	04/01/2019		New

To see a tickler that has a future due date, clear the **Apply Alert Days Before Due** option in the Filters section. Click **Search**.

3. Select the tickler you want to work with from the list view grid. The page that opens will be specific to the tickler. For example, if the tickler name indicates an enrollment letter, the mail merge page will open. If the tickler name indicates adding a worker, the provider's worker page might open.

   If the tickler is part of a Workflow Wizard, the left-hand navigation area will show the Workflow Wizard step or steps.

4. Complete the task defined in the tickler. Select **Save** from the **File** menu when done.

Searching for records

As you work with WellSky Human Services you will often search for the records you need to open. You can use the Quick Search or Advanced Search to find the records you need to work with.

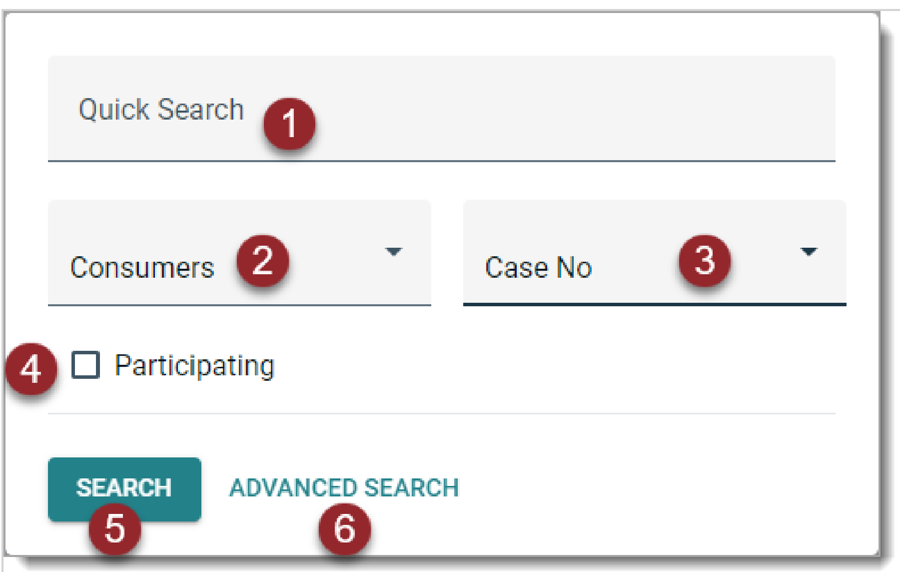
Continue reading the following topics to learn more.

- Using Quick Search below
- Using Advanced Search on the facing page

Note: Your current role and User ID is associated with security settings. Search results will include only those items your user ID is permitted to view.

Using Quick Search

Use the Quick Search to locate a record using just a few search parameters. The Quick Search contains three fields: a data entry field, a chapter list, and a short list of search fields based on the chapter or page you select.



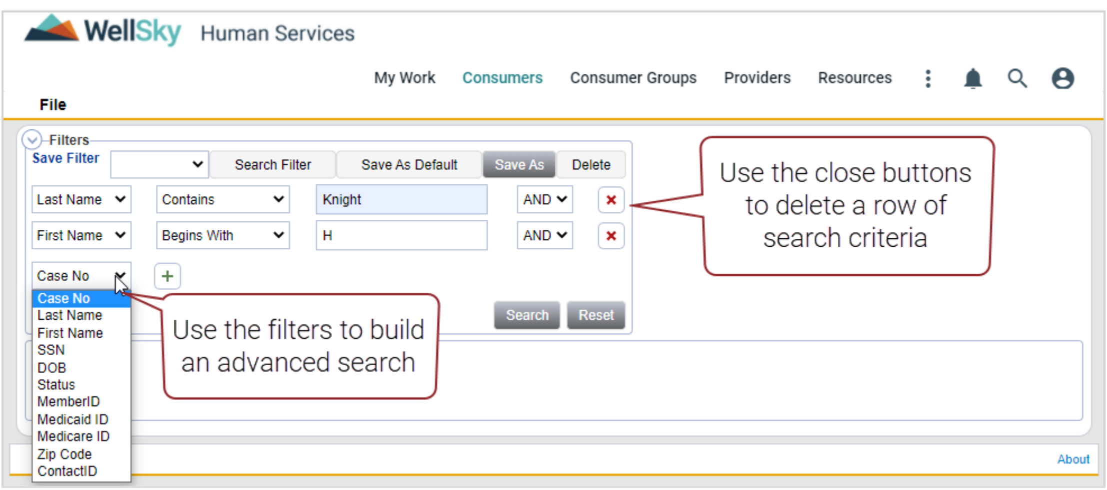
1. The Quick Search text entry bar is at the top of the Quick Search box. Use this data entry field to enter search criteria (for example, a consumer name).
2. The Chapter menu is underneath the Quick Search text entry bar on the left-hand side. Use this dropdown menu to select the chapter to search (for example, Consumers). This

dropdown will only display chapters to which your user role has access. If a chapter has been hidden for your current role, you will not be able to select it in the quick search.

3. The filter menu is underneath the Quick Search text entry bar on the right-hand side.Use this dropdown menu to select the search criteria you'll use to compare to the value you typed in the first box. For example, select Last Name to search for a specific last name. Other options include CaseNo, Last Name, DOB, SSN, or Medicaid ID. You can search using one value at a time. For more complex searches use the Advanced Search feature.
4. The Participating checkbox, when visible, lets you narrow your search to only include consumers with an active authorization or enrollment. Other restrictions on which records you can see (for example, consumers with the same fund code setting as your user role) still apply.
5. Click the Search button to run the search after you've set up the search criteria. Search results will appear in the list view grid in the middle of the page.
6. Use the Advanced Search link to open the Advanced Search feature.

Using Advanced Search

Use the advanced search tool when you want to create a more specific search using multiple types of criteria. Click the Advanced Search link located in the user profile pop-up or at the top of a chapter page. The Advanced Search filters will display at the top of the chapter before you select a record (for example, a consumer or a provider).



The Filters box opens, allowing you to narrow the search by specifying one or more fields to search. The following is a sample list of the available filter options:

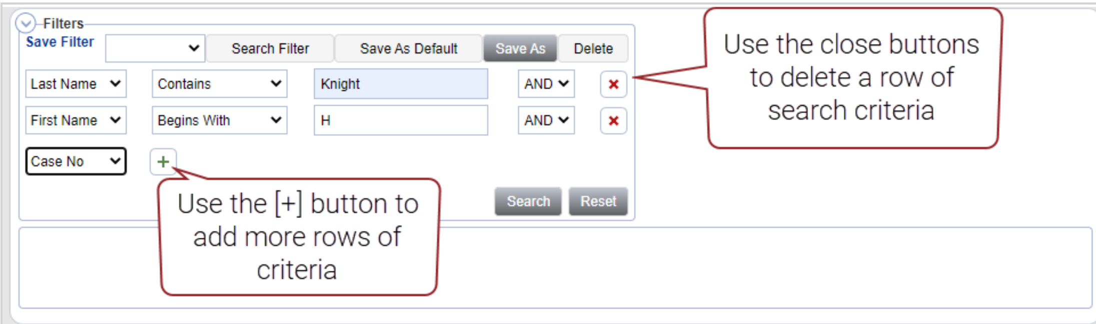
- Last Name
- First Name
- SSN
- DOB
- Status
- Medicaid ID
- Medicare ID
- Street
- City
- State
- Zip Code
- Home Phone
- Work Phone
- Show Consumers

  The Show Consumers filter, if available, is a dropdown list that you can use to select "Any" or "Only Participating." When "Any" is selected, the search results are based on the user's role security settings. When you select "Only Participating" the search results will only return consumers who meet at least one of the following criteria:

  - Has an active/non-terminated authorization that is associated with the worker’s program or provider
  - Has an active enrollment that is associated with the worker's provider
  - The worker is a primary worker of the consumer’s division record.

Using the filter

Use the filter dropdown to select the field to search, choose the operator and then populate the search criteria.

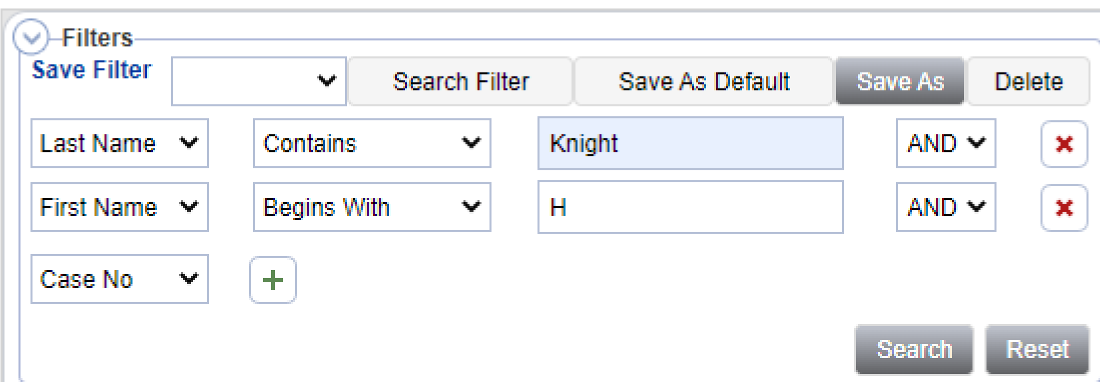


- You can specify multiple criteria in the Filter. Use the Plus (+) button to add more criteria to the query.
- Use the close button [X] next to a filter row to remove that row.
- Click the Search button when you are ready to execute the search.
- Click the Reset button to clear the filter.

Minimize and expand the search tools

You can minimize the Advanced Search tool. To collapse a search tool, click the collapse arrow icon . Click the expand arrow button to view the search tools again.

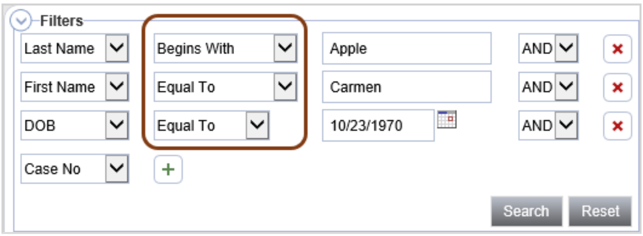
The following image shows the Advanced Search tool expanded to show options.



To collapse the Advanced Search tool, click the expand arrow button (). This will allow more space on the browser page to view records.

Comparison operators

You will use comparison operators when you use the Advanced Search feature. Select the comparison operator from the second column.

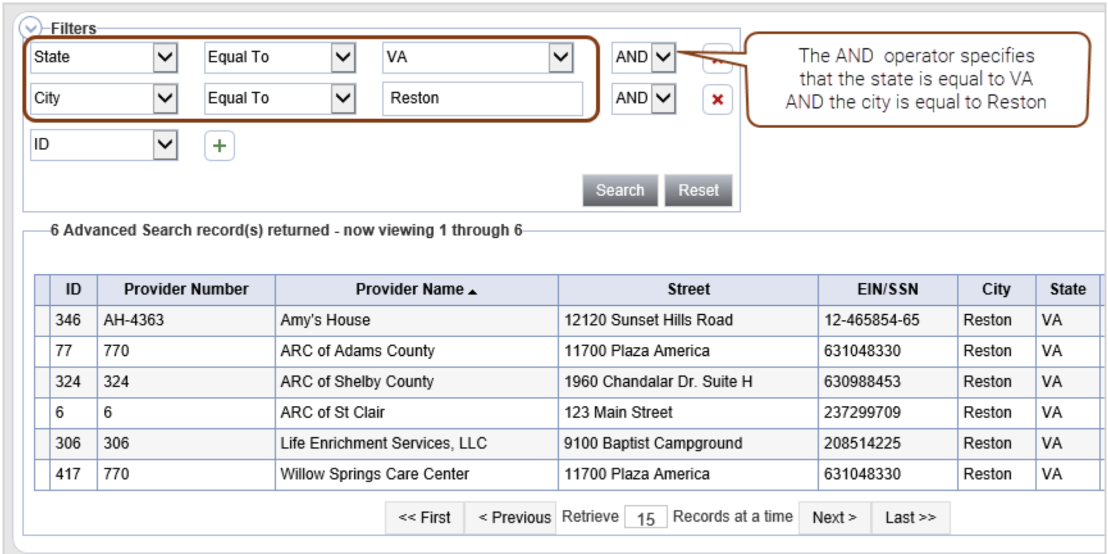


Operator	Definition
Equal to	Returns records that exactly match the criteria you enter.
Begins with	Returns records that begin with the criteria you enter. For example, if you search for Last Name, begins with “apple” the search results might include the last names “Apple,” “Appleton,” and “Applebaum.”
Ends With	Returns records that end with the search criteria you specify. For example, if you search for a provider name that ends with “adams county,” the results could include the provider “ARC of Adams County” and “Home Care of Adams County.”
Not Equal To	Returns records that do not match the entered criteria.
Greater Than	Use the greater than operator with numbers. For example, you could search for all consumers with a birthday after (greater than) 01/01/1970.
Less Than	Use the less than operator with numbers. For example, you could search for all consumers with a birthday earlier (less) than 01/01/1970.
Contains	Returns records that contain the specified criteria. For example, if you search for Last Name, contains “apple” the search results might include the last names “Apple,” “Appleton,” “Applebaum,” and “Papple.”
Blank	Returns records where the selected field is blank. For example, you could search for any record with a blank date of birth.
Non-Blank	Returns records with any information in the selected field. For example, you could search for any record with a date of death.

Boolean operators (AND/OR)

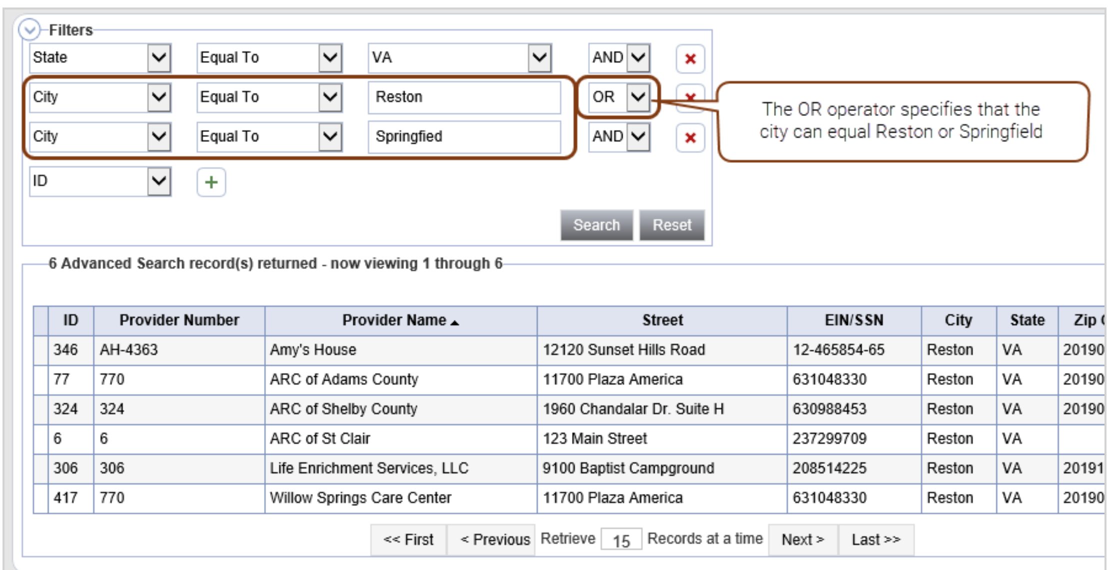
Use Boolean operators to combine search criteria with the Advanced Search tool. This helps you create more specific searches.

Use the AND operator when you want to narrow your search results. For example, you might want to search for providers available in a specific state and city.



ID	Provider Number	Provider Name	Street	EIN/SSN	City	State
346	AH-4363	Amy's House	12120 Sunset Hills Road	12-465854-65	Reston	VA
77	770	ARC of Adams County	11700 Plaza America	631048330	Reston	VA
324	324	ARC of Shelby County	1960 Chandalar Dr. Suite H	630988453	Reston	VA
6	6	ARC of St Clair	123 Main Street	237299709	Reston	VA
306	306	Life Enrichment Services, LLC	9100 Baptist Campground	208514225	Reston	VA
417	770	Willow Springs Care Center	11700 Plaza America	631048330	Reston	VA

Use the OR operator when you want to expand the search results. For example, you might want to search for providers available in a specific state and either of two possible cities.



ID	Provider Number	Provider Name	Street	EIN/SSN	City	State	Zip
346	AH-4363	Amy's House	12120 Sunset Hills Road	12-465854-65	Reston	VA	20190
77	770	ARC of Adams County	11700 Plaza America	631048330	Reston	VA	20190
324	324	ARC of Shelby County	1960 Chandalar Dr. Suite H	630988453	Reston	VA	20190
6	6	ARC of St Clair	123 Main Street	237299709	Reston	VA	
306	306	Life Enrichment Services, LLC	9100 Baptist Campground	208514225	Reston	VA	20191
417	770	Willow Springs Care Center	11700 Plaza America	631048330	Reston	VA	20190

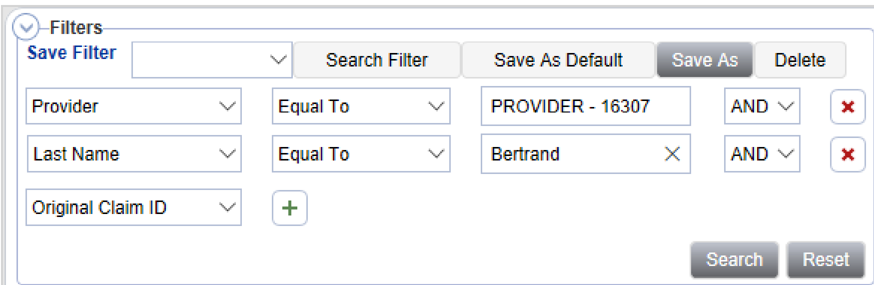
Saving filters

Many pages in WellSky Human Services allow you to create and save the filters you use to find records. When you save a filter, you can select it as the default filter. The default filter will apply to data each time you open the page.

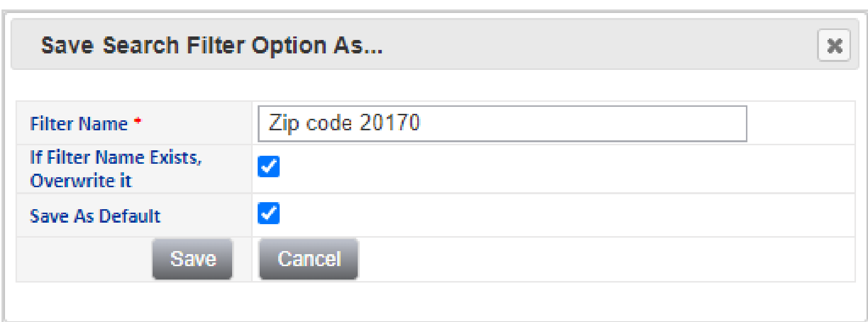
To create and save a filter

1. From the Filters area, select a **search field** from the first dropdown. For example, you can search by provider. Click the add icon [+] to add the comparison operator.

2. Select a **comparison operator** from the second drop down. For example, select Equal To
3. Type the search criteria in the third dropdown. For example, type a provider's identification information.
4. If you are adding an additional row of search criteria, select AND or OR from the fourth dropdown.
   - Use the AND operator when you want to narrow your search results. For example, you might want to search for records for a specific provider AND a specific consumer.
   - Use the OR operator when you want to expand the search results. For example, you might want to search for records for two providers.
5. Repeat the previous steps as needed to complete the filter.



6. Click **Save As.** The **Save Search Filter Option As...** popup appears.
7. Type a **Filter Name**.
8. To replace an existing filter with the same name, select **If Filter Name Exists, Overwrite it.**
9. Select **Save As Default** if you want this filter to filter the page when it opens every time.



Using a saved filter

Saving a filter preserves your search criteria. You can reapply the search criteria and run the search in just a few clicks. If you find that you use the same filter every time you use the page, you can save that filter as the default filter.

To use a saved filter

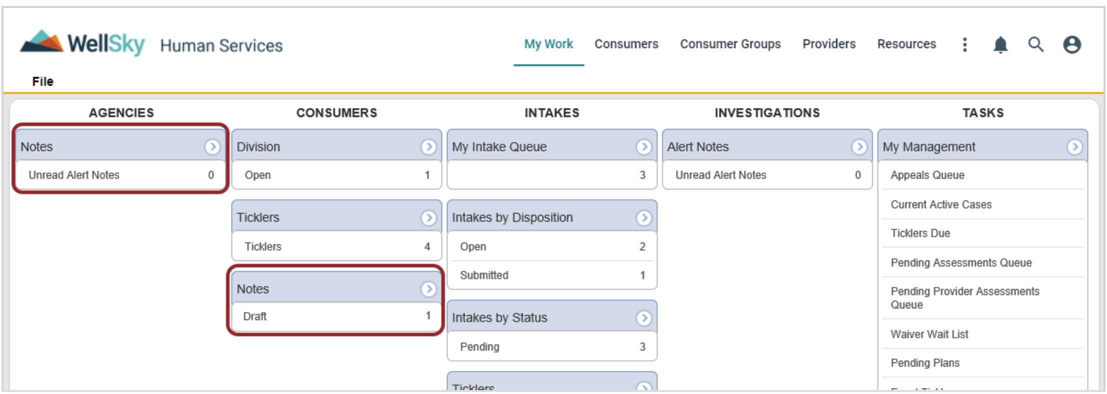
1. Select the **filter name** from the **Save Filter** dropdown.
2. Click **Search Filter.**
3. Click **Search.**

Notes

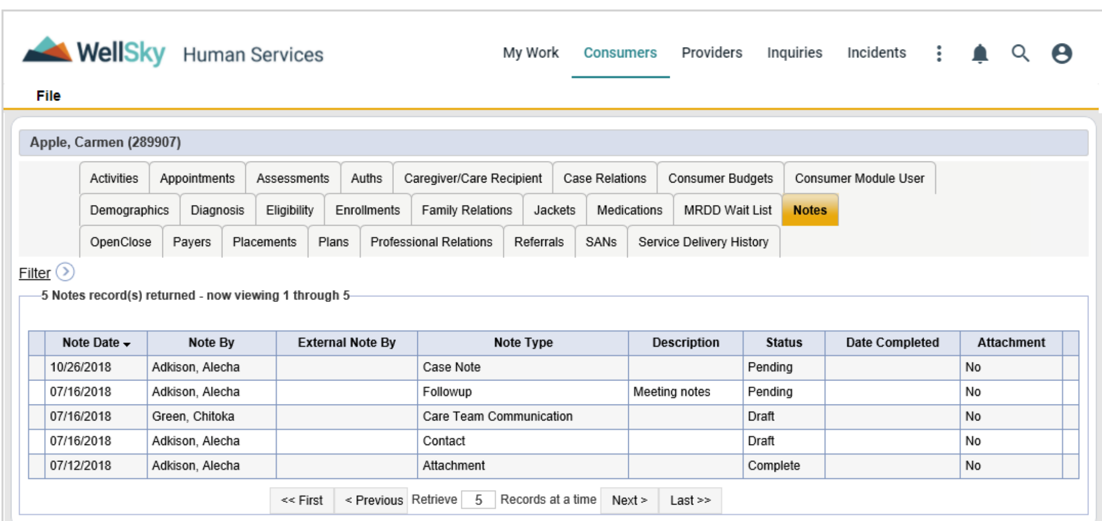
Notes can be added to many types of records in WellSky Human Services. Notes can be associated with consumer records, provider records, agency records, investigations, and more. Notes may be found in many different areas in the application, but you'll work with them in much the same way regardless of the note location.

Notes are available from the My Work dashboard, as tabs in a chapter, and as subpages in a record.

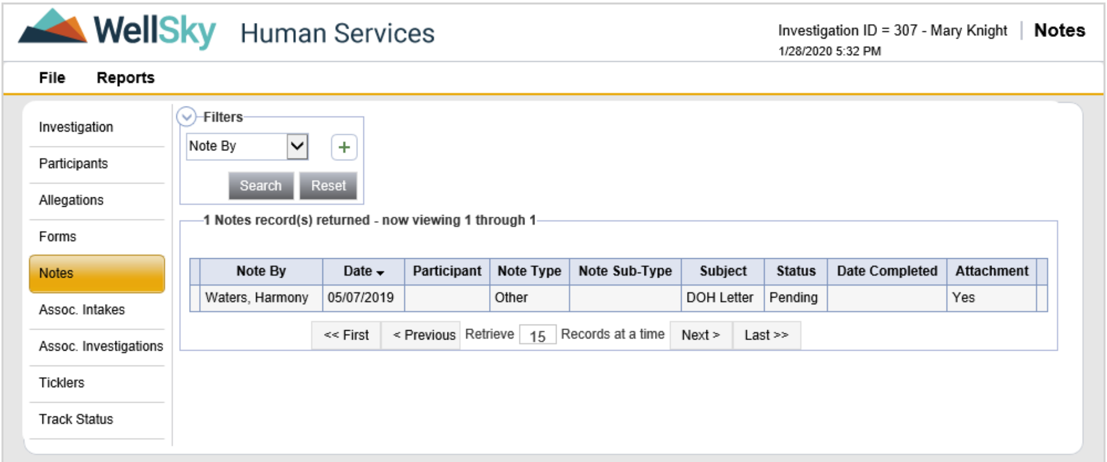
The image below shows notes available in My Work. Notes that are routed to you will be shown in My Work.



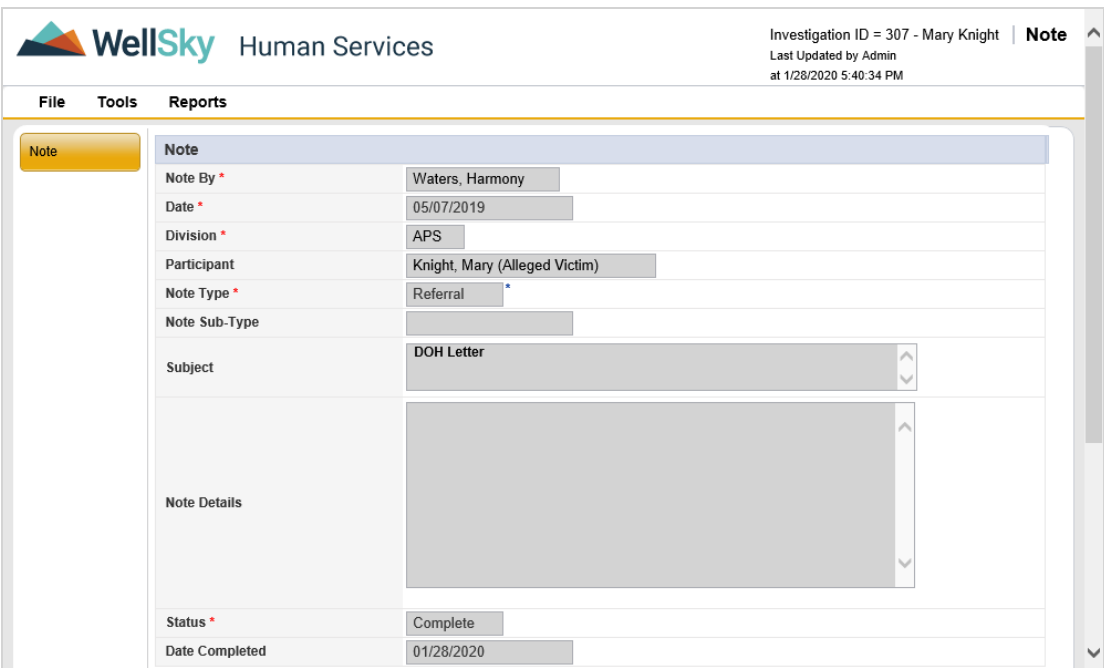
The image below shows notes available as the Notes tab in a chapter. Notes associated with a record are visible to all workers who have access to that record.



The Notes page is often shown as a subpage in the record. In the image below, the Notes list view page is part of an Investigation record. Notes associated with a record

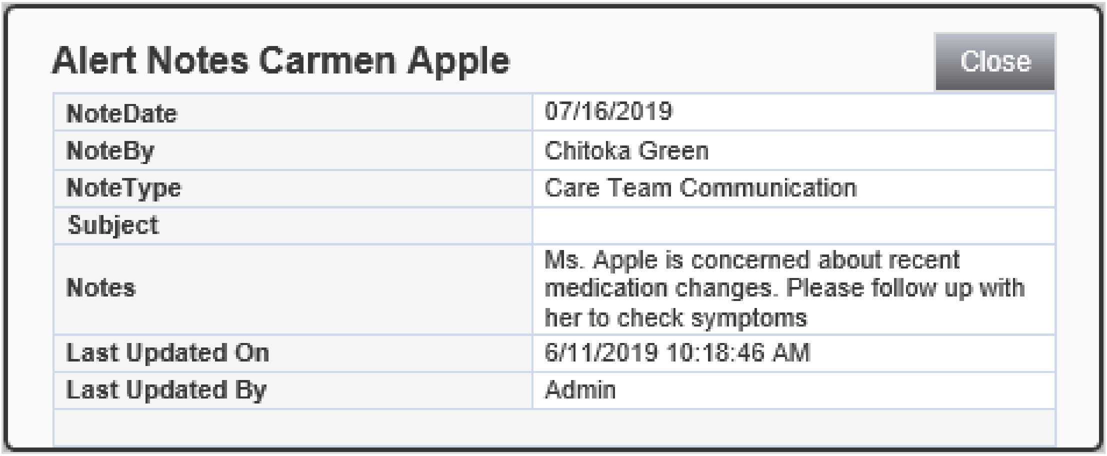


To open an existing note, select it from the list view grid. The Notes detail page opens. In the note shown below, the note status is set to “complete.” This makes the note read-only and it cannot be edited.



Alert notes

An alert note is a note saved with the status of “alert.” When you open a record that has an alert note, the contents of that note display in a pop-up window when the record opens.



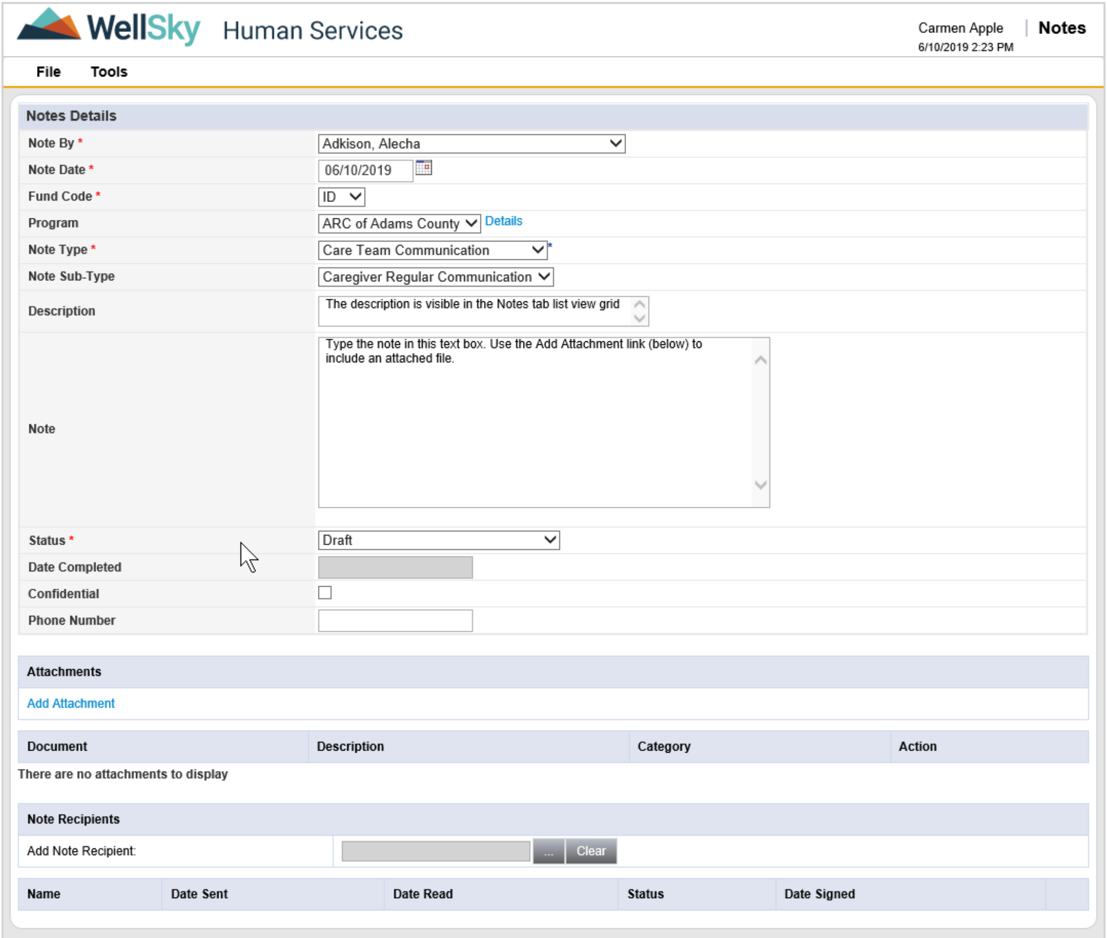
Adding a note

You can add a note to many different types of records in WellSky Human Services: consumers, providers, agencies, investigations, and claims.

To save a note

1. Open the record to which you want to add a note.
2. Select the **Notes** tab.

3. From the **File** menu select **Add Notes.** The Notes page opens.



4. Complete the note information. Required fields are marked with a red asterisk (*).

5. Select the note **Status**.

- When the note record status is set to draft, the large note text field displays as a single text field and is editable by the author and their supervisors. If another user opens the draft note record the note text field will be non-editable.

- If the status is pending, this field can be configured so that any user will be able to either make edits directly into the note box or by using the append note box.

- If the status is complete, the note record becomes read-only.

- If the status is alert, a pop-up alert message will appear when a user attempts to access the record associated with this note (for example, when you open the provider record).

6. From the **File** menu select **Save Notes** or **Save and Close Notes** when done.

Notes page elements

Below is a list of standard field descriptions that could appear on add and edit note record. Based on your agency's configuration of the application some of these fields may be hidden.

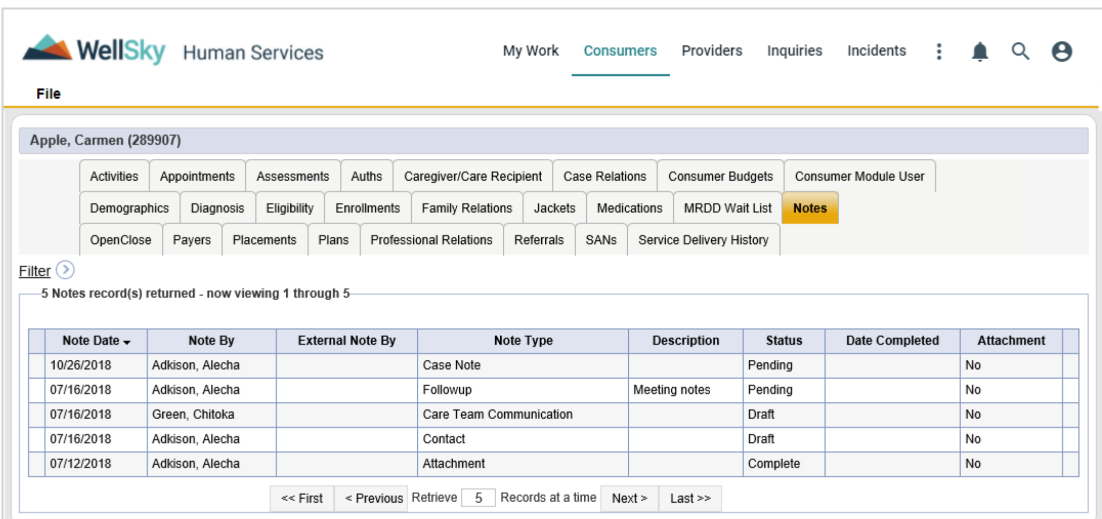
- Note By — Use this worker dropdown field to record the name of the worker adding the note. This is a required field
- Note Date — Use this date field to record the date the note was added. This is a required field
- Division — If the provider is open to multiple divisions, use this dropdown to specify which Fund Code the notes should be associated to.
- Note Type — Use this dropdown to identify the note type.
- Note Sub-Type — Use this dropdown field to further identify the type of note. Note subtypes apply to specific note types.
- Description — Use this text field to record the subject line for the note. The note description is visible in the Notes tab list view.
- Note — Record the body of the note in this text box. Notes can include up to 10,000 characters.
- Append Text to Note — Any update to the note will use the append box. Select the Append Text to Note button to add text to the Note. Appended text is marked with the date, time, and user name the new comment is added.
- Status — Select the note status from this dropdown.
  - When the note record status is set to draft, the large note text field displays as a single text field and is editable by the author and their supervisors. If another user opens the draft note record the note text field will be non-editable.
  - If the status is pending, this field can be configured so that any user will be able to either make edits directly into the note box or via the append note box.
  - Edit Mode — the user can make any updates directly into the Note Box.
  - Complete — the note record becomes read-only.
  - Alert — a pop-up alert message will appear anytime a user attempts to access this consumer record.

- **Date Completed** — this date field is read-only and populates with a date when the note status is marked complete.
- **Confidential** — Use this checkbox field to flag the consumer record as confidential. Only workers associated with the record and their supervisors will be able to access this record.
- **Phone Number** — Use this number field to record a phone number.
- **Add Attachment** — Use this link to upload a file.
- **Note Recipients** — Click the search ellipsis to open a worker search popup. Select a worker to receive the note. This note will appear on the worker's My Work desktop. The list view below this field will show the name, date sent, date read, status (read), and date signed to show when this worker interacted with the note.

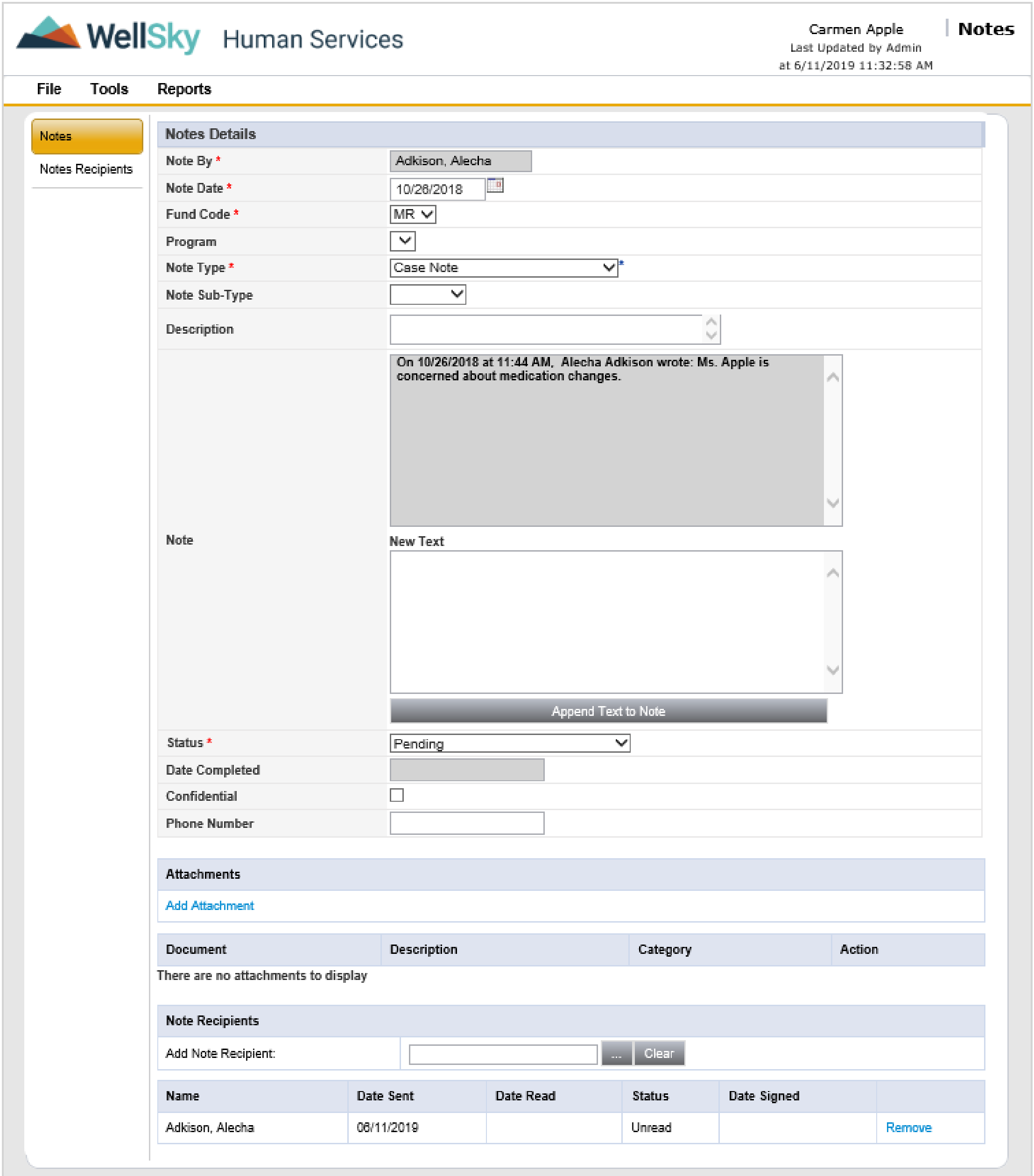
Editing a note

To edit a consumer note

1. Navigate to the record and select the **Notes** tab. Existing notes are shown in the list view.



2. Select the note that you want to edit from the list view. The Note page opens.



3. Complete the note changes. If the note is saved with a status of Pending, you will add new text in the **New Text** box. Click **Append Text to Note** when done.

4. Select **Save and Close Notes** from the **File** menu.

> **Note:** When the note record status is set to draft, the note text displays as a single text field, and is editable by the author and the author's supervisor. If another user opens the draft note record the note text field will be non-editable.

Note attachments

A note can include up to ten attached files. These files may include most non-executable file formats, for example:

- Images — bmp, dot, gif, jpg, jpeg, pict, png, tif, tiff, and xps
- Documents — doc, docx, txt, ppt, pptx, and pdf
- Spreadsheet — xls and xlsx
- Sound — wav

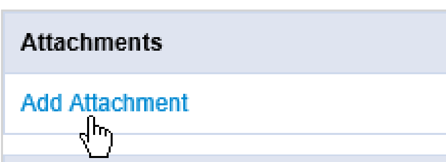
File names can only include letters, numbers, hyphens, underscores, and spaces. File Names cannot include special characters.

> Note: The maximum file size for all attachments on a single note is 5MB. If your files exceed this limit, an error message will display.

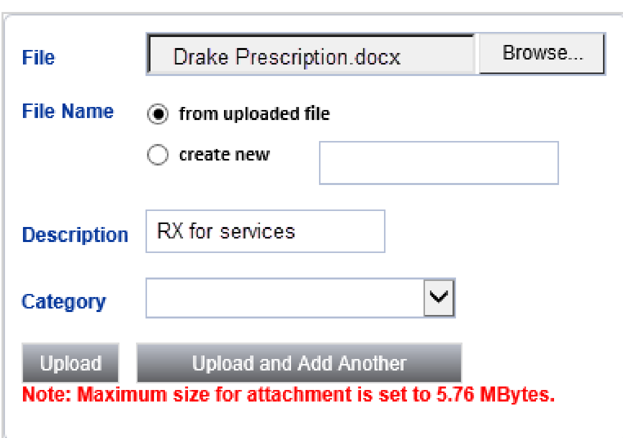
For more information on creating a note, see Adding a Consumer Note.

To add an attachment to a note

1. From the open Notes page, click **Add Attachment** in the Attachments section.



2. The File Upload Form page opens. Click the **Browse** button to select the file. Navigate to the file location and select the appropriate file.

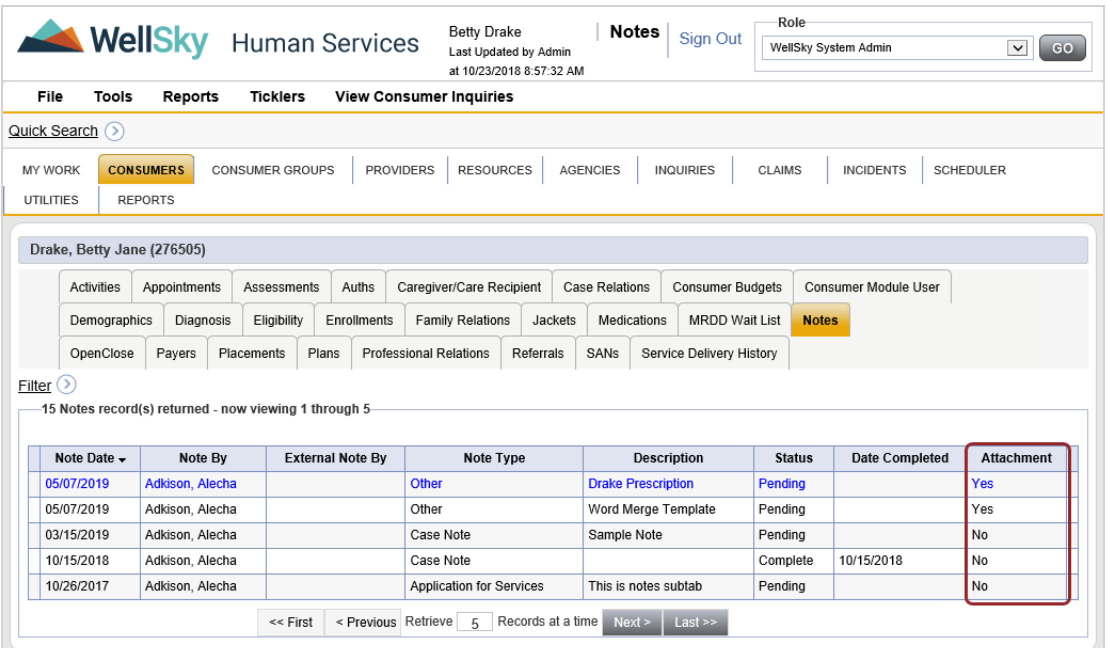


3. Complete the attachment information and click **Upload**. The attachment information is shown in the Document section of the Note page.

Document	Description	Category	Action
Drake Prescription.docx	Rx for Services		Remove

If the note has a pending status, you can use the Remove link to remove the attachment. When the note has a complete status, you can no longer remove the attachment.

4. From the **File** menu, select **Save and Close Note** when done. The Notes pages closes. You can see which notes have attachments in the Notes page list view Attachment column.



Printing note attachments

The Print Note Attachment feature allows you to select and print multiple note attachments. Use this feature to quickly compile notes and note attachments related to a record. For example, you could print all consumer notes and note attachments for court or legal proceedings.

When you print the note attachments, you can also choose to print the note details.

- Print Note Attachment(s) Only Notes — print only the note attachments.
- Print Note Attachment(s) with Details Notes — print the note attachments and the details from the note record.

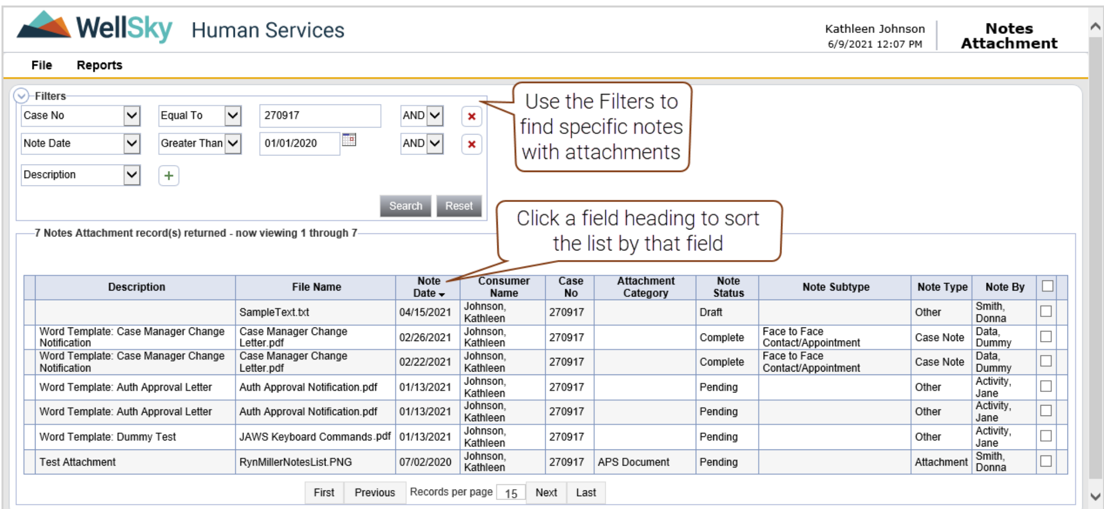
The following file types can be printed as note attachments: doc, docx, txt, pdf, gif, jpeg, jpg, png, tif, tiff, bmp, xls, xlsx, pptx, ppt, and xps.

> **Note:** As of the Summer 2022 release, this functionality is available on the following pages: Consumer Notes, Inquiry Notes, and Incident Notes, and Provider Notes.

Sorting and filtering the listed notes

Use the Filters available on the Notes Attachment page to filter the available notes. For example, you could choose to filter the list by note date and note type. The available filters on this page include the following: Description, File Name, Note Date, Consumer Name, Case No, Attachment Category, Note Status, Note Subtype, and Note Type.

To sort the list of notes attachments, click the field heading in the list view grid. Click the heading once to sort in ascending order. A small triangle is displayed next to the field name. Click the field heading again to sort the list in descending order. For example, you may choose to sort the list by most recent note date as shown below.



To print note attachments

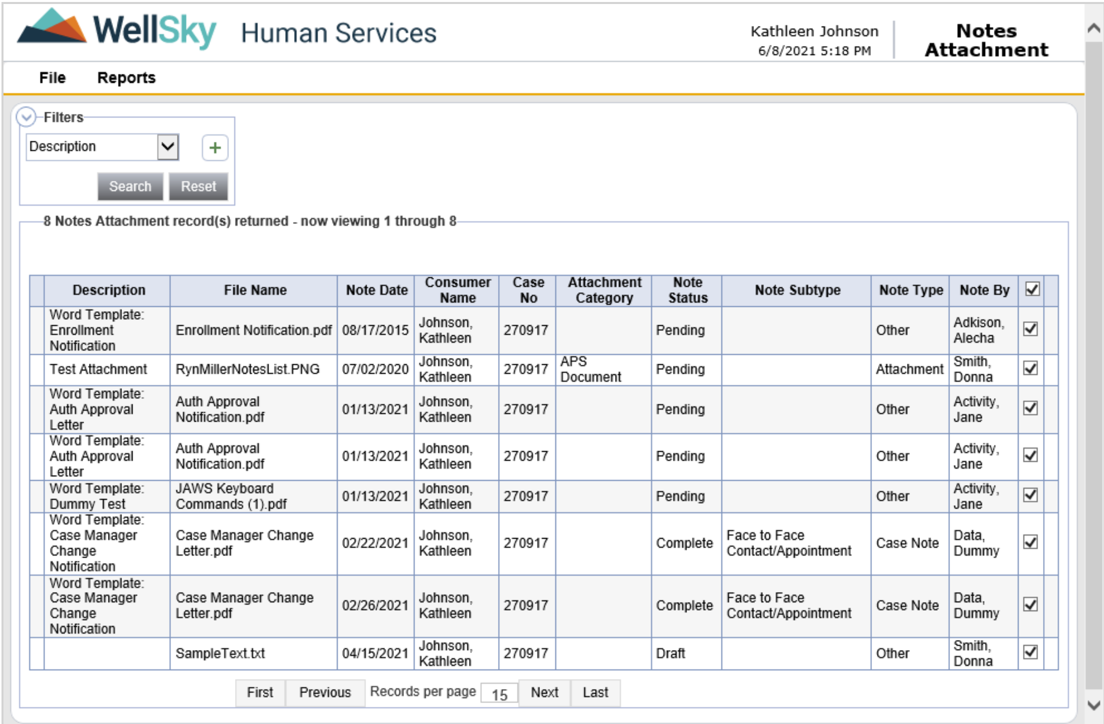
1. Open the **Consumer, Inquiry, or Investigation (Incident) record** for which you would like to print notes. Select the **Notes** tab.

2. From the **File** menu, select **Print Notes Attachments**. The Notes Attachments page opens.

3. Use the Filters to search for the notes you need to print. To return all notes, leave these filters blank. Click **Search**.

4. To sort the list of notes with attachments, click a field heading in the list view grid. The notes should be listed in ascending order based on the values in that field. Click the field heading a second time to sort the notes in descending order.

5. Select the notes you want to print using the selection box in the last column of each row in the list view grid.



Description	File Name	Note Date	Consumer Name	Case No	Attachment Category	Note Status	Note Subtype	Note Type	Note By	☑
Word Template: Enrollment Notification	Enrollment Notification.pdf	08/17/2015	Johnson, Kathleen	270917		Pending		Other	Adkison, Alecha	☑
Test Attachment	RynMillerNotesList.PNG	07/02/2020	Johnson, Kathleen	270917	APS Document	Pending		Attachment	Smith, Donna	☑
Word Template: Auth Approval Letter	Auth Approval Notification.pdf	01/13/2021	Johnson, Kathleen	270917		Pending		Other	Activity, Jane	☑
Word Template: Auth Approval Letter	Auth Approval Notification.pdf	01/13/2021	Johnson, Kathleen	270917		Pending		Other	Activity, Jane	☑
Word Template: Dummy Test	JAWS Keyboard Commands (1).pdf	01/13/2021	Johnson, Kathleen	270917		Pending		Other	Activity, Jane	☑
Word Template: Case Manager Change Notification	Case Manager Change Letter.pdf	02/22/2021	Johnson, Kathleen	270917		Complete	Face to Face Contact/Appointment	Case Note	Data, Dummy	☑
Word Template: Case Manager Change Notification	Case Manager Change Letter.pdf	02/26/2021	Johnson, Kathleen	270917		Complete	Face to Face Contact/Appointment	Case Note	Data, Dummy	☑
	SampleText.txt	04/15/2021	Johnson, Kathleen	270917		Draft		Other	Smith, Donna	☑

6. To print the note and the attachment, select **Print Note Attachment(s) with Details** from **the** File menu. The browser print preview window opens. From this browser window, you can print the documents or save as a PDF.

7. To print only the attachments, select **Print Note Attachment(s)** from the **File** menu. The browser print preview window opens. From this browser window, you can print the documents or save as a PDF.

8. Close the browser window when done.

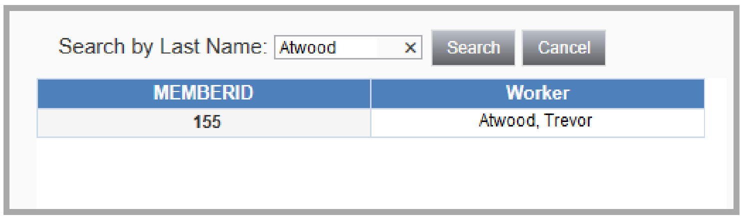
Routing notes using My Work

When you route a note to another worker, that note appears in a Notes node in their My Work desktop. When the worker receives the note and opens it, the application records the date read in the note. Notes with any status can be routed to another worker; only notes with a pending status can be edited by other workers.

If a note is routed to a worker who does not have the corresponding section configured to show on their My Work desktop, they will not see the consumer note routed to them. For example, some users may not have the Consumers section exposed in their My Work desktop. If you route a consumer note to that user, they will not see the note in My Work. The user will be able to see the note in the Consumers chapter if they can view the Consumers chapter.

To route a note to a recipient using My Work

1. Navigate to the record and select the **Notes** tab. Existing notes are shown in the list view.
2. Select the note that you want to edit from the list view. The Note page opens.
3. Scroll down to the Notes Recipients field.
4. Use the search ellipsis to search for the worker recipient. Select the worker from the search window. The worker's name will display in the Recipient Name field.



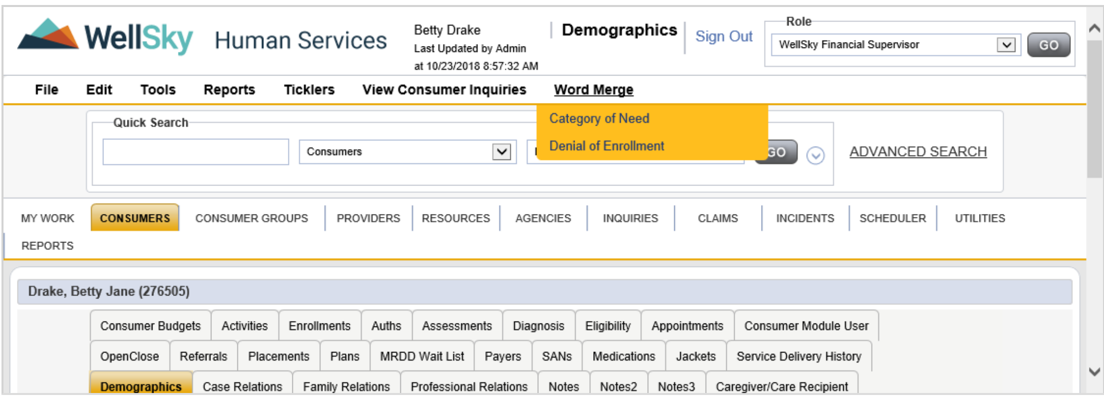
5. Select **Save and Close Notes** from the **File** menu when done. The note will appear in the worker's My Work.

Running a report or word merge

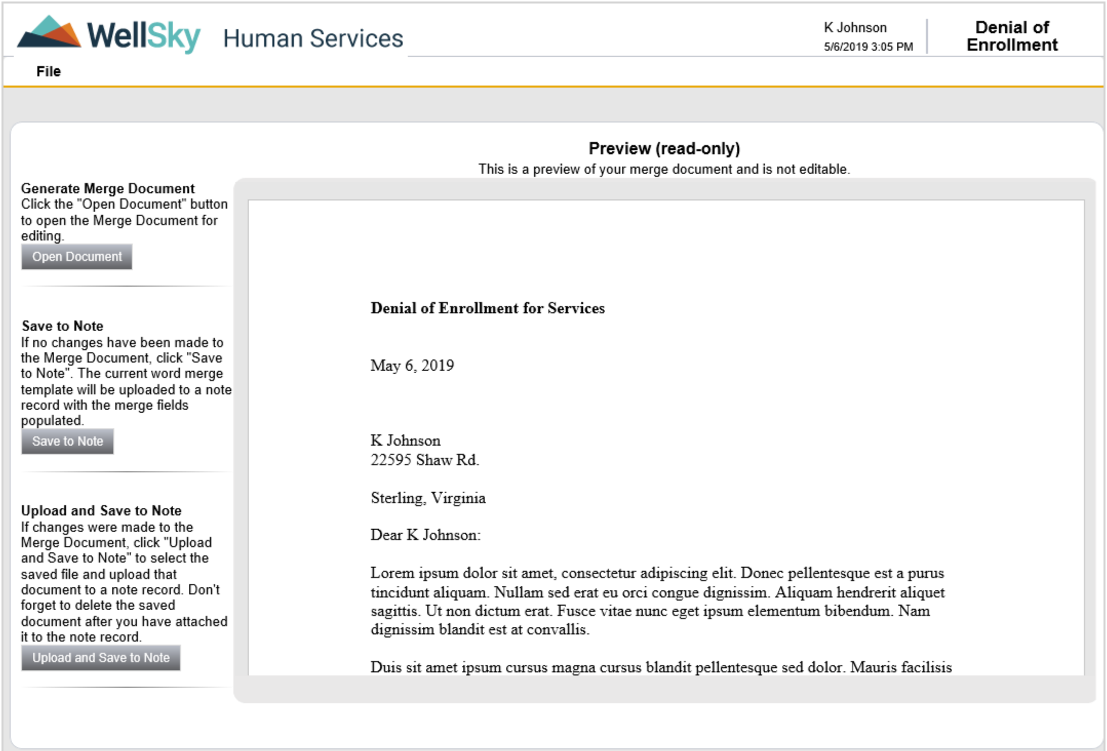
The Word Merge and Reports menus display in the menu bar when you can generate a report or word merge document that uses the data in the current record. Word merge documents can be configured to either allow or prevent editing.

Word merge menu

The Word Merge menu contains a list of Word Merge documents that are available to the current user. Word merge documents are setup by the system administrator using the Word Merge utility. The available documents may differ from one user to another based on user role configuration.



Select the word merge document from the list. It will open in a preview window and include data from the record.

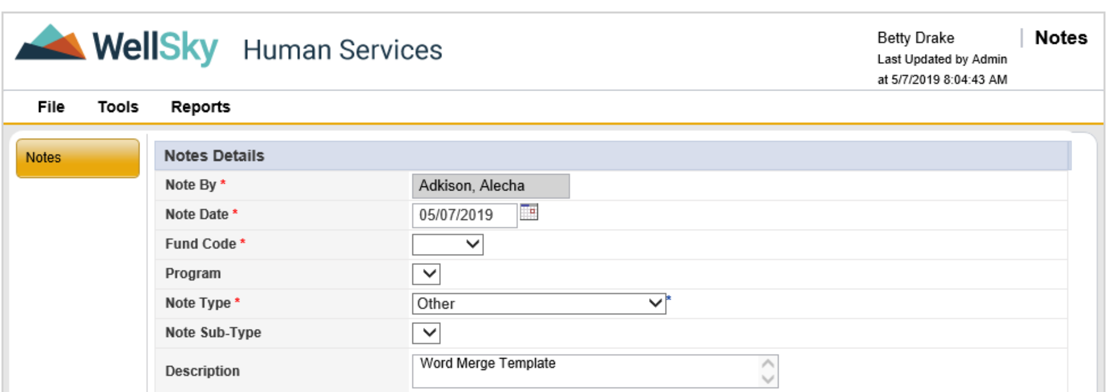


From the Word Merge preview window you can choose to open the document, save it to a note in WellSky Human Services, or upload the edited version and save it as a note.

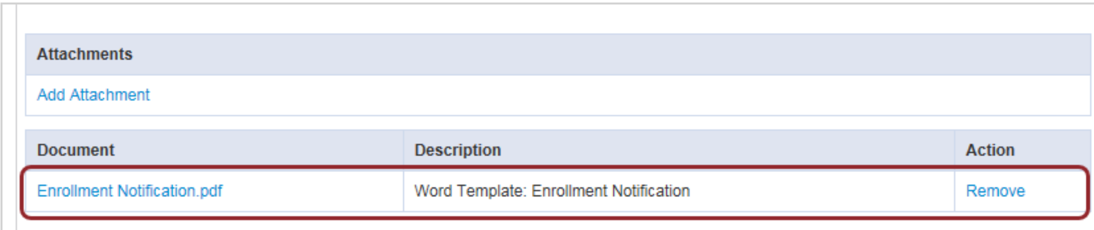
Open the document in Microsoft Word

If you choose to open the document, it will open in Microsoft Word where you may be able to edit it. You may have to save the document before it fully opens. After you complete your edits, save the document and then choose the Upload and Save to Note option.

Word merge saved to note

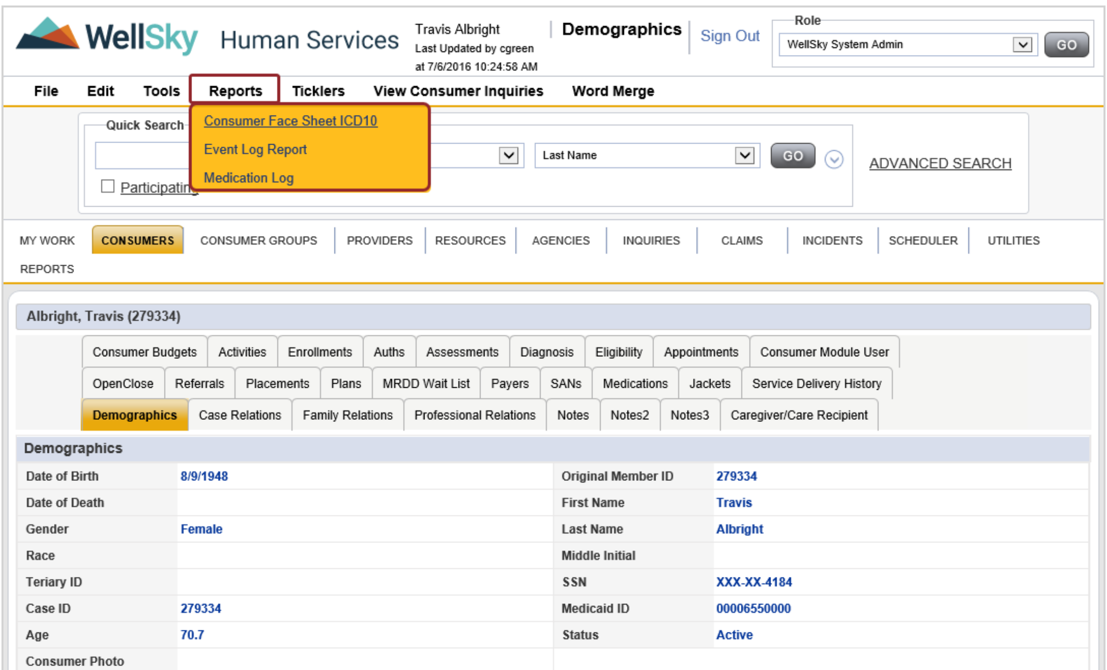


The attachment section in the note record shows that the word merge document is attached. Click this link to preview the attached PDF document.

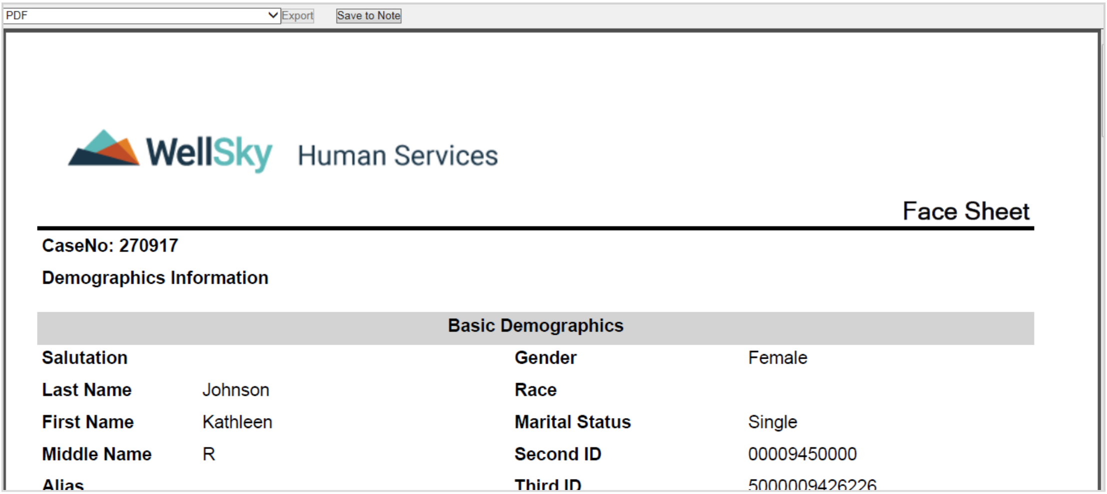


Reports menu

The Reports menu contains a list of reports available to the current user role. System administrators can configures which reports display in each area of the application.



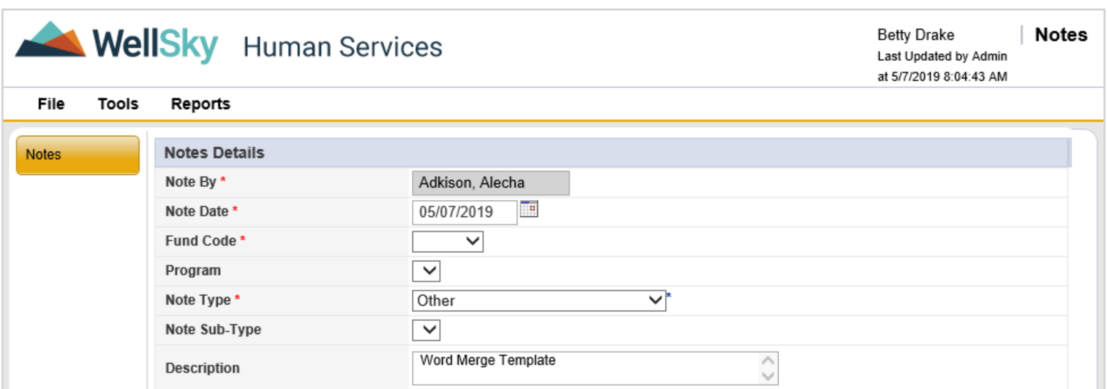
When you select a report from the menu it opens in a new window.



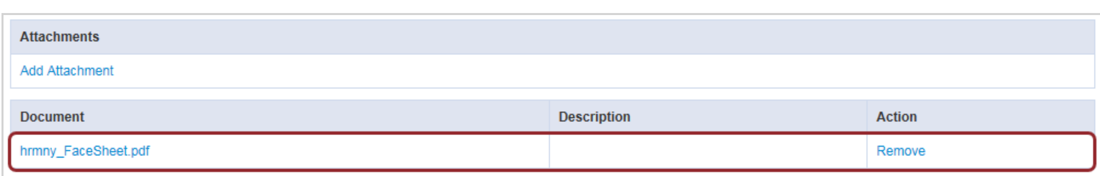
Save a report as a note

Some reports may be configured so you can save the report as a note in the consumer record. When you are able to save the report as a note, you will see a **Save to Note** button in the preview window.

The Notes page will open. Document additional details about the attached report in this page.



The attachment section in the note record shows that the report document is attached. Click this link to preview the attached PDF document.



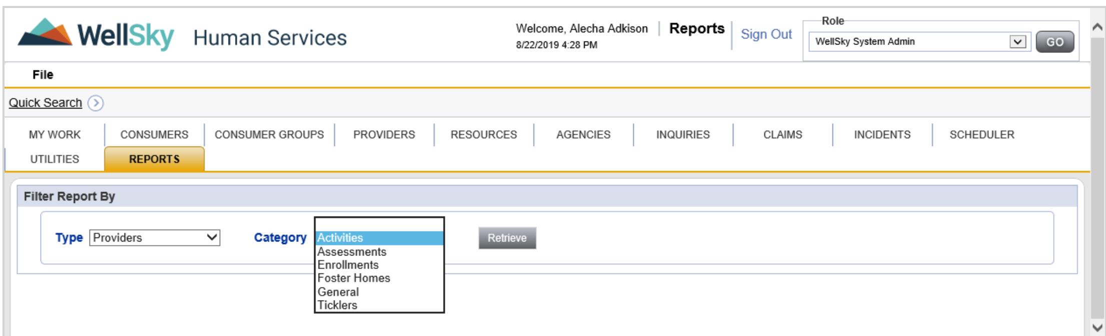
Running standard reports

You can access reports using the Reports chapter, through the Report menu within a chapter or page, or through a Workflow Wizard that is triggered as part of the business workflow. Reports that are available within the application chapters and pages are also available in the Reports utility.

To generate a report from the Reports chapter

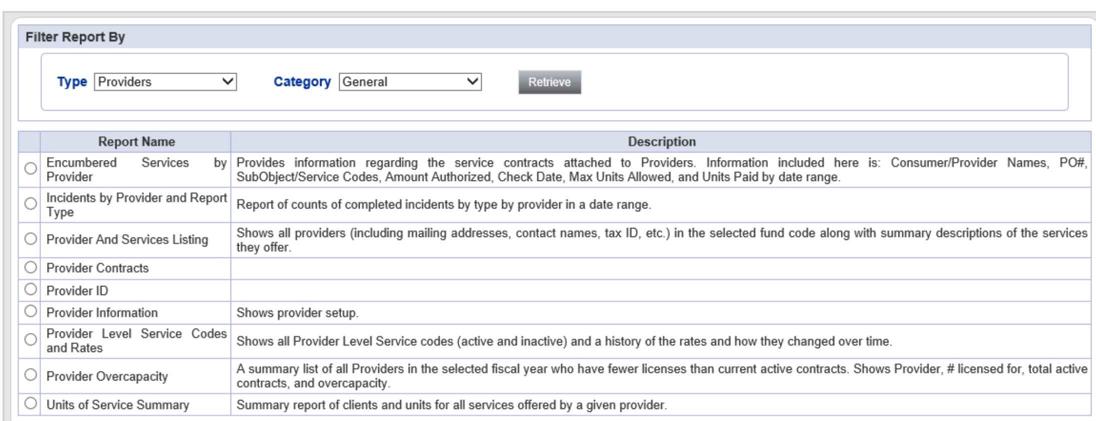
1. Open the **Reports** chapter. The Reports page displays. You will use the filter buttons to find a report.

2. Use the **Type** dropdown to select a report type. Use the **Category** dropdown to select a category. The report categories are specific to each report type. For example, the image below shows the list of report categories available for the provider report type.



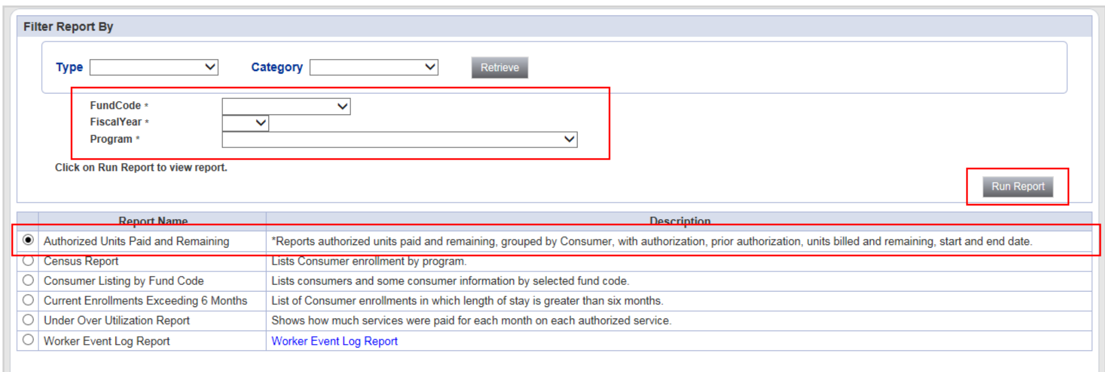
> **Note:** If you do not specify a report type and category, all reports will be listed.

2. Click **Retrieve** to display a list of reports.

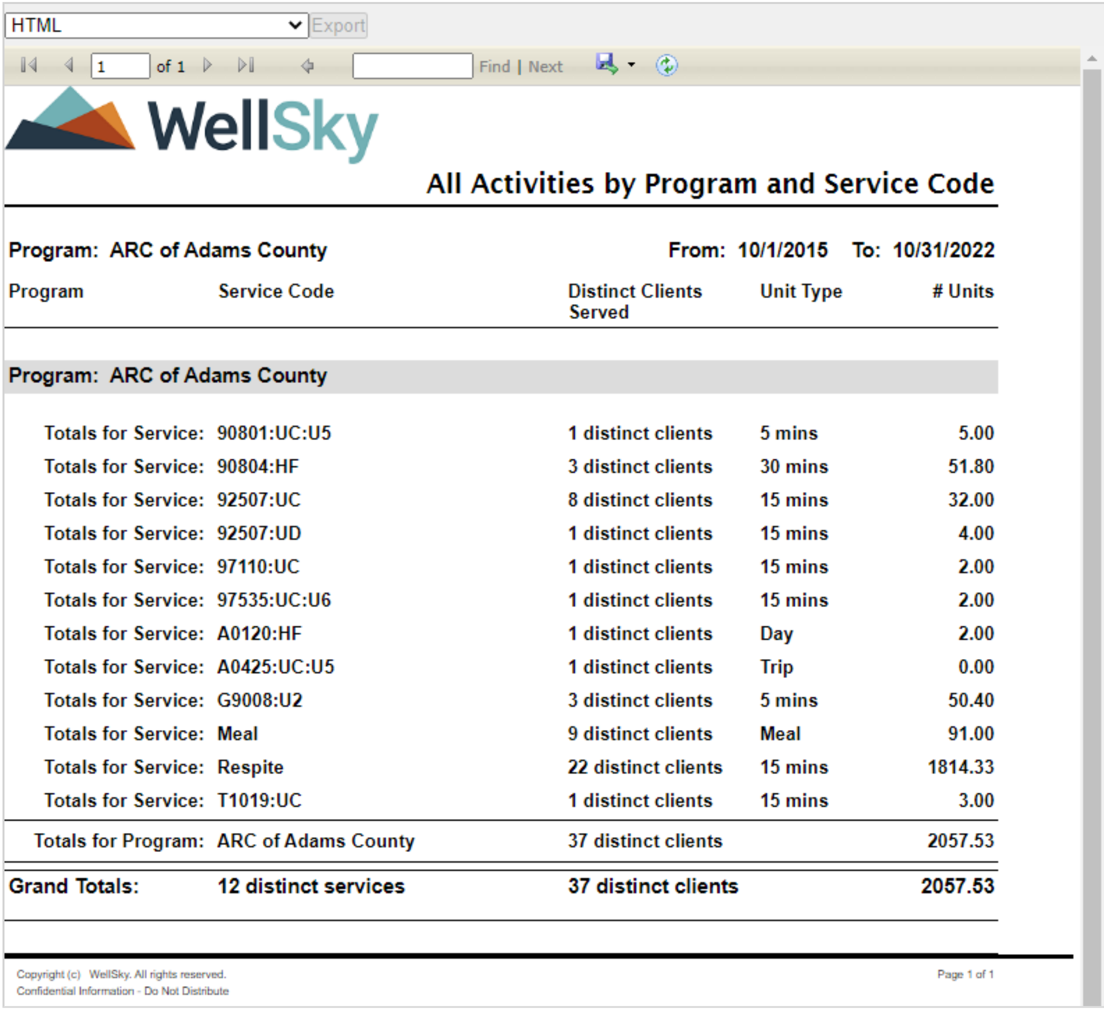


3. Click the radio button  next to a report to select it.

4. Complete any requested parameter information required to run the selected report. The parameter information may change from one report to another. Use these parameters to determine the scope of the data in the report.



5. Click **Run Report** to view the report selected.



HTML Export

1 of 1 Find | Next

WellSky

All Activities by Program and Service Code

Program: ARC of Adams County **From: 10/1/2015 To: 10/31/2022**

Program	Service Code	Distinct Clients Served	Unit Type	# Units
Program: ARC of Adams County				
Totals for Service:	90801:UC:U5	1 distinct clients	5 mins	5.00
Totals for Service:	90804:HF	3 distinct clients	30 mins	51.80
Totals for Service:	92507:UC	8 distinct clients	15 mins	32.00
Totals for Service:	92507:UD	1 distinct clients	15 mins	4.00
Totals for Service:	97110:UC	1 distinct clients	15 mins	2.00
Totals for Service:	97535:UC:U6	1 distinct clients	15 mins	2.00
Totals for Service:	A0120:HF	1 distinct clients	Day	2.00
Totals for Service:	A0425:UC:U5	1 distinct clients	Trip	0.00
Totals for Service:	G9008:U2	3 distinct clients	5 mins	50.40
Totals for Service:	Meal	9 distinct clients	Meal	91.00
Totals for Service:	Respite	22 distinct clients	15 mins	1814.33
Totals for Service:	T1019:UC	1 distinct clients	15 mins	3.00
Totals for Program:	ARC of Adams County	37 distinct clients		2057.53
Grand Totals:	**12 distinct services**	**37 distinct clients**		**2057.53**

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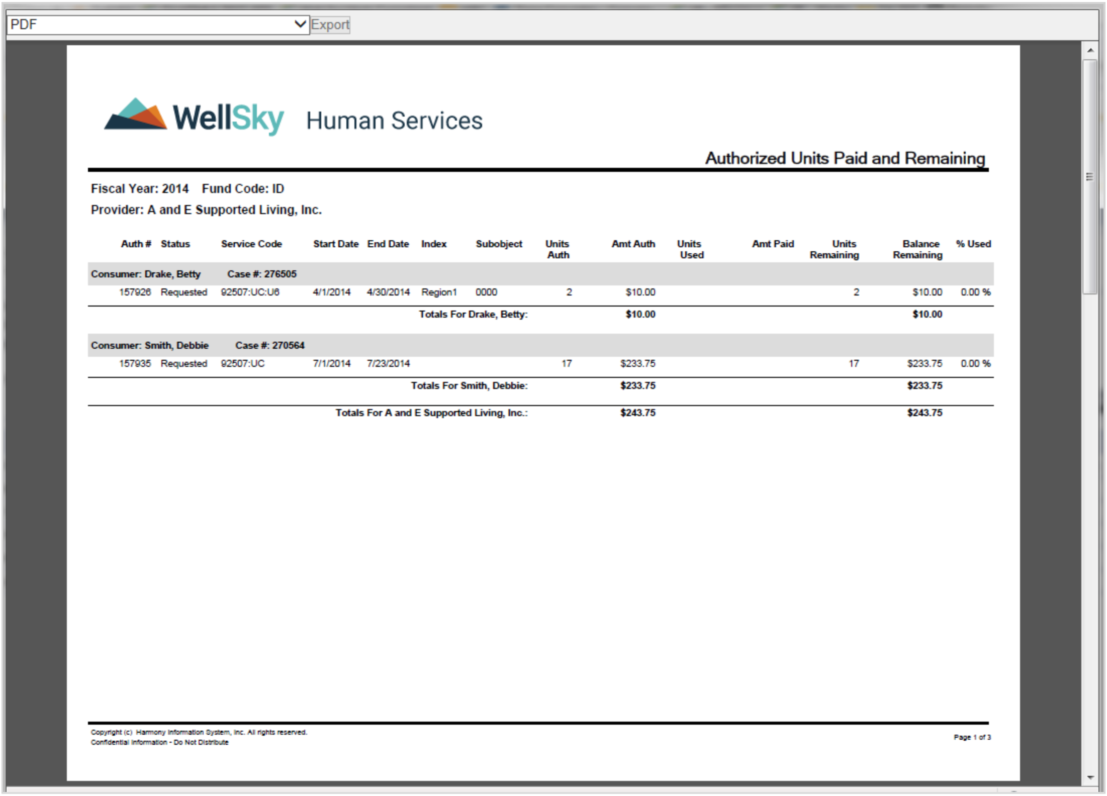

PDF Export

WellSky Human Services

Authorized Units Paid and Remaining

Fiscal Year: 2014 Fund Code: ID

Provider: A and E Supported Living, Inc.

Auth #	Status	Service Code	Start Date	End Date	Index	Subobject	Units Auth	Amt Auth	Units Used	Amt Paid	Units Remaining	Balance Remaining	% Used
Consumer: Drake, Betty		Case #: 276505											
157926	Requested	92507:UC:U6	4/1/2014	4/30/2014	Region1	0000	2	$10.00			2	$10.00	0.00 %
					Totals For Drake, Betty:			$10.00				$10.00	
Consumer: Smith, Debbie		Case #: 270564											
157935	Requested	92507:UC	7/1/2014	7/23/2014			17	$233.75			17	$233.75	0.00 %
					Totals For Smith, Debbie:			$233.75				$233.75	
					Totals For A and E Supported Living, Inc.:			$243.75				$243.75	

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6. Use the Export drop-down menu to select the report format. You can export the report to view in a variety of formats including CSV, PDF, Excel, and Word.