


# Client Admission Workflow Validation

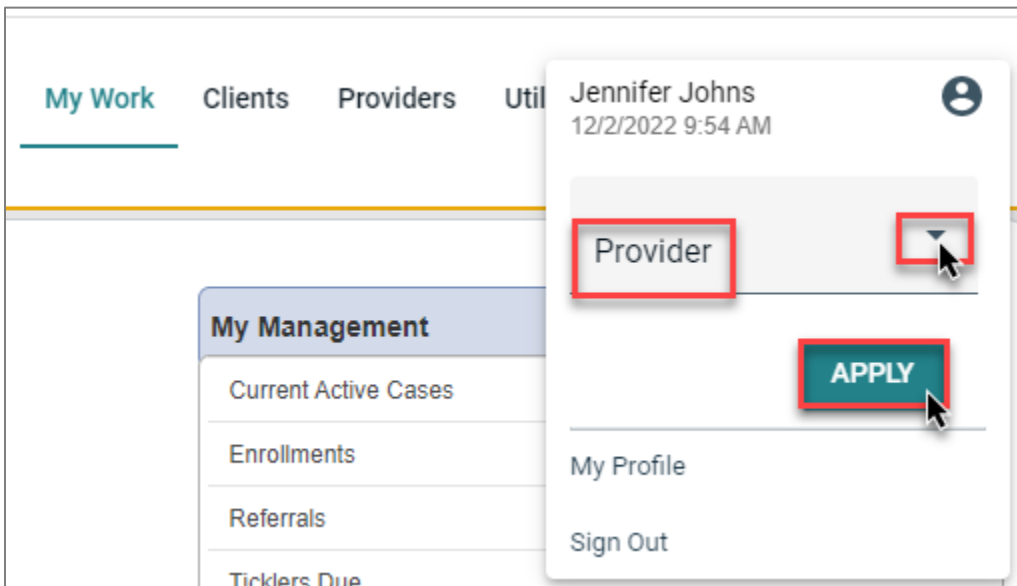
**NOTE: If you have not yet reviewed “Getting Started with WellSky Human Services” (Getting Started with WSHS.pdf) please do so before starting this workflow. Please be sure to turn pop-up blockers off or allow them for the WellSky Human Services site.**

## Table of Contents

Client Admission Workflow Validation .....	1
Set Role .....	1
Search for/add new client.....	2
Add Location Episode .....	6
Add Client Admission form for TEDS and SABG .....	7
Add OPTIONAL Kansas Assessment .....	13
Access existing client record .....	17
Alternate Workflow: Open a new Location Episode for an existing client .....	20


## Set Role

1. Set Role:
  - a. Click on the **profile icon**  in the upper right-hand corner of the screen.
  - b. Select **Provider** from the dropdown, then click **Apply**. (You may already be in the provider role)



Caption: screen shot of the role being applied to the page

## Search for/add new client

1. Search for/add new client:
  - a. Click the **search magnify glass** icon  in the upper right-hand corner of the screen.
  - b. In the box that opens, click **Advanced Search**

Caption: screen shot of the search dialog, showing the location of the Advanced Search link

- c. You will then see a listing of all clients associated to your Provider.
- d. Review the names to identify if your client already exists.
  - i. If you need to narrow the results you can type in the client's last name and click **Search**.

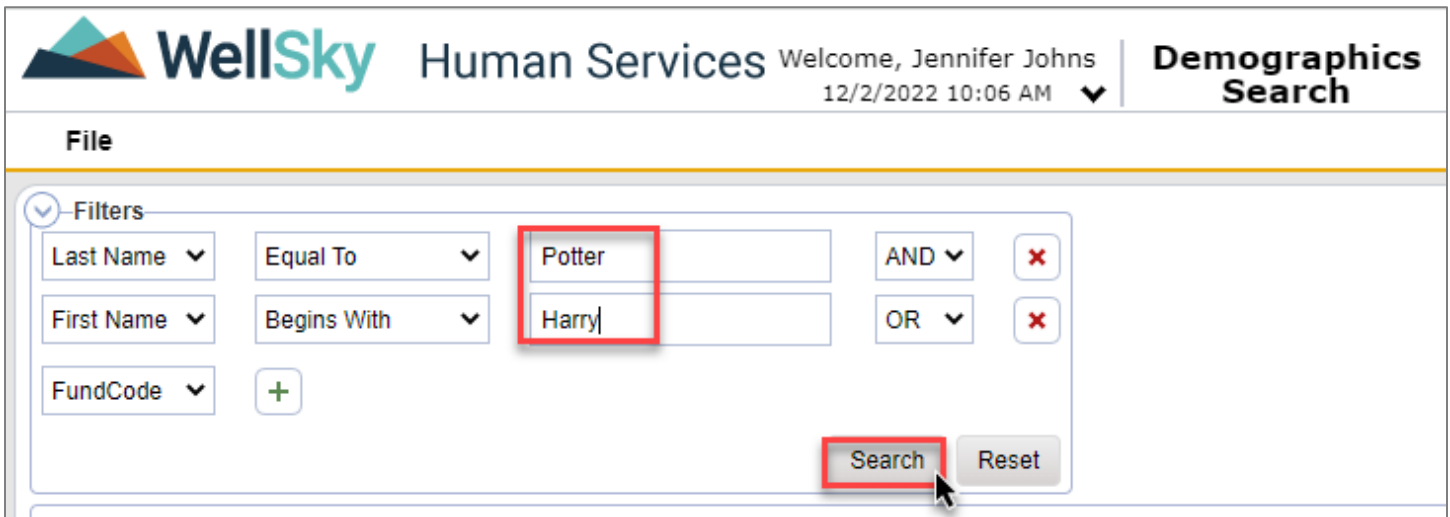
Case No	Last Name	First Name	DOB	Status	MemberID	Relation	ContactID	Identifier Type	Identifier Value
10001	Johns	August	08/16/1951	Active		No	10006	SSN	XXX-XX-5885
10002	Baggins	Bilbo	12/05/1990	Active		No	10020	SSN	XXX-XX-9189

Caption: screen shot showing a list of clients and the filter to narrow the results

- e. If the client exists, select them by clicking anywhere on their row in the results. Skip to [Alternate Workflow: Open a new Location Episode for an existing client.](#)
- f. Otherwise, On the **File** menu, select **Add New Demographic Search**.

Caption: screen shot showing Add New Demographic Search in the file menu

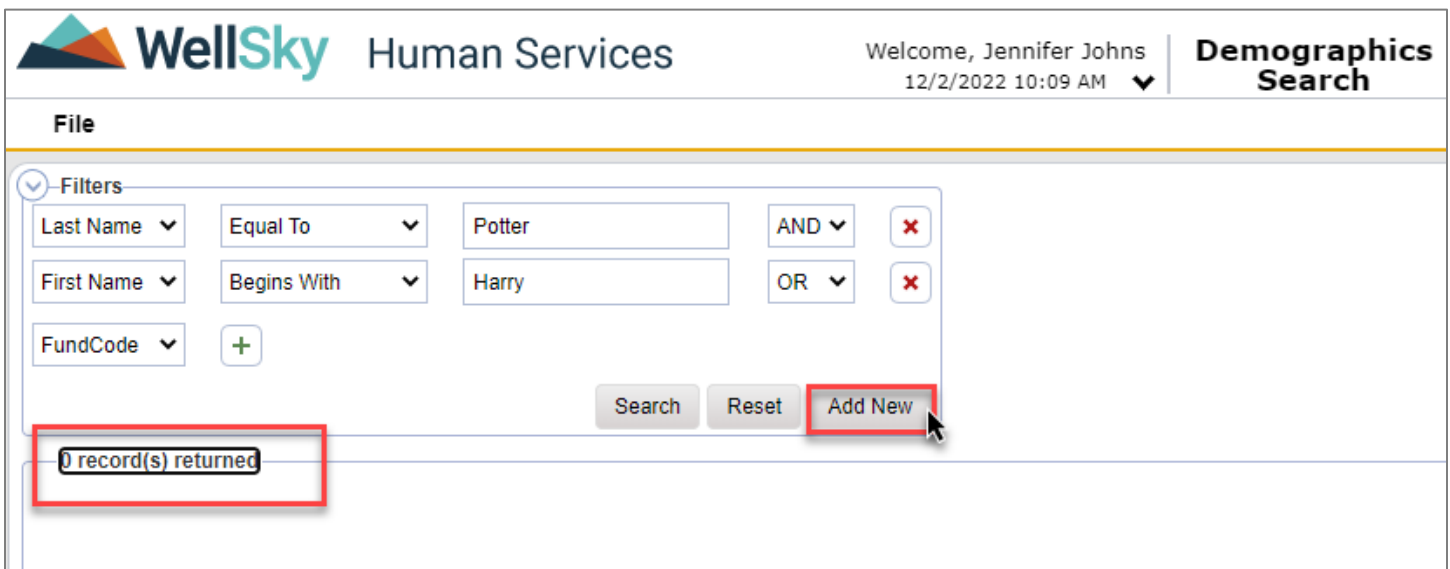
2. The Demographics Search window appears.
  - a. Enter the client's last name and first name into the search boxes and click **Search**.



The screenshot shows the WellSky Human Services Demographics Search interface. At the top, it says "WellSky Human Services" and "Welcome, Jennifer Johns 12/2/2022 10:06 AM". The page title is "Demographics Search". Below the header is a "File" section. The main area contains a "Filters" section with three rows of search criteria: "Last Name" set to "Equal To" with the value "Potter", "First Name" set to "Begins With" with the value "Harry", and "FundCode" with a "+" button. The search criteria are connected by "AND" and "OR" operators. At the bottom right of the filter section, there are "Search" and "Reset" buttons. The "Search" button is highlighted with a red box.

Caption: screen shot of new demographic search

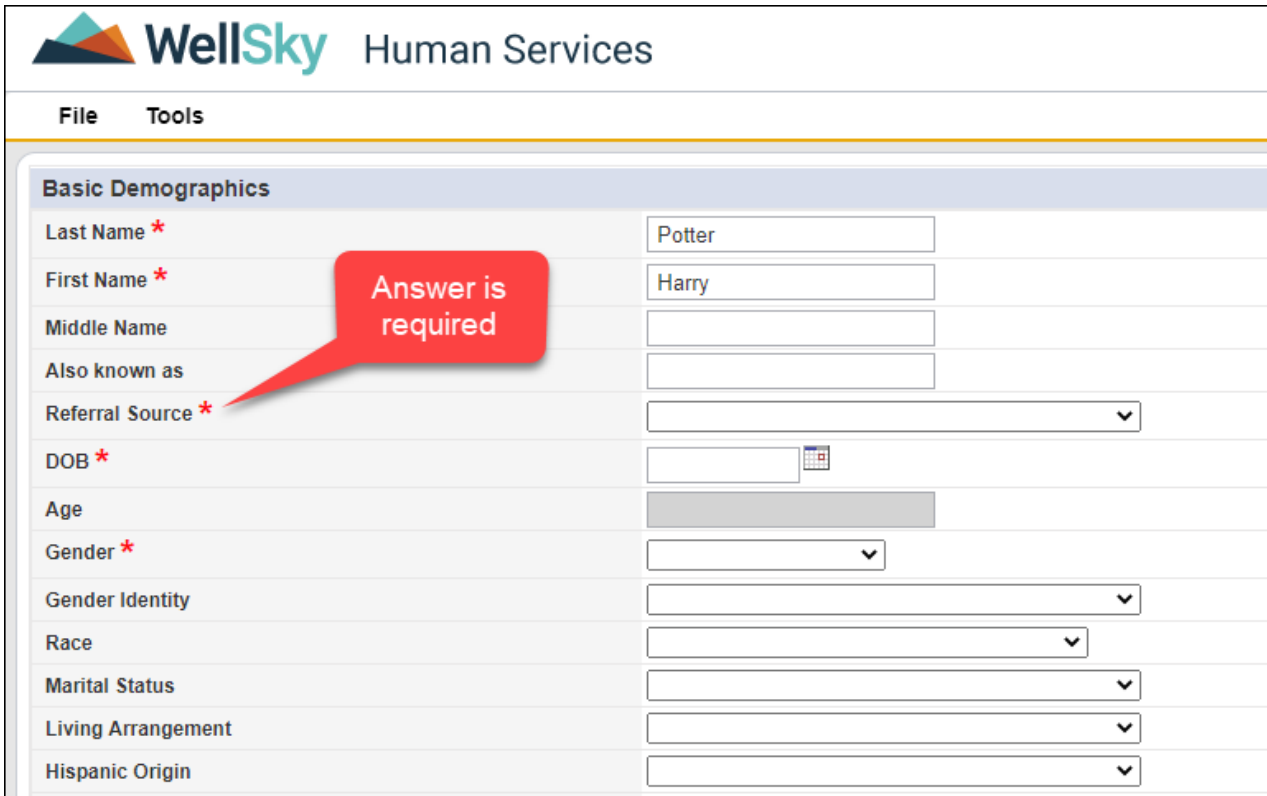
- b. If the client is not found, click the **Add New** button.
      - i. *If the client is found, click on the client and follow steps under Alternate Workflow: Open a new Location Episode for an existing client.*



The screenshot shows the WellSky Human Services Demographics Search interface after a search. The header and filters are the same as in the previous screenshot. The search criteria are "Last Name: Potter" and "First Name: Harry". At the bottom right of the filter section, there are "Search", "Reset", and "Add New" buttons. The "Add New" button is highlighted with a red box. Below the filter section, a red box highlights the text "0 record(s) returned" in the search results area.

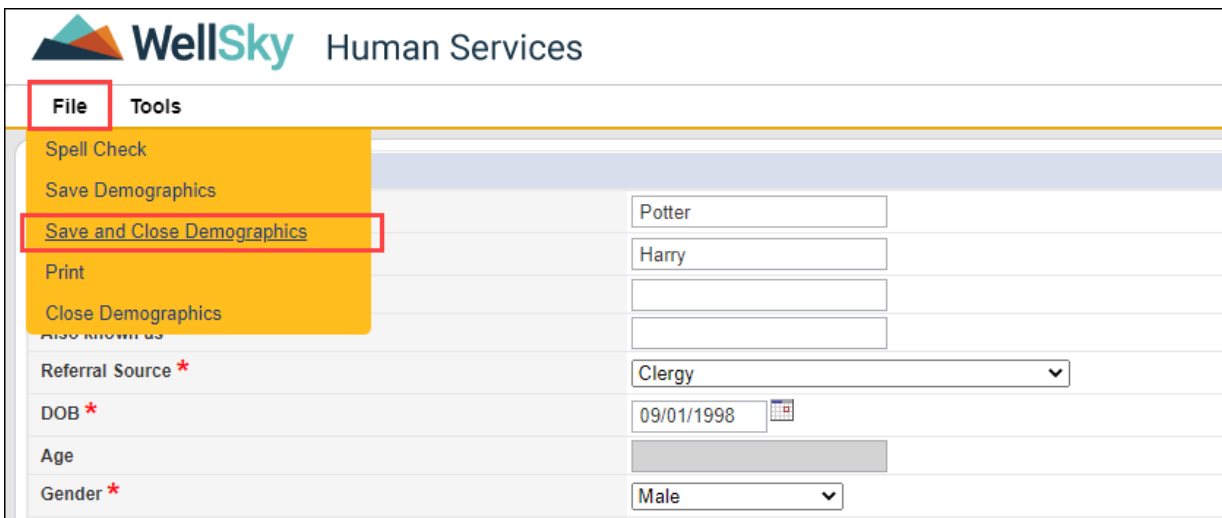
Caption: screen shot of step to Add New client

- The Demographics detail window appears. Enter information for the new Client while being aware that some fields require an answer while some do not. Required fields have a red asterisk appended to the question label.



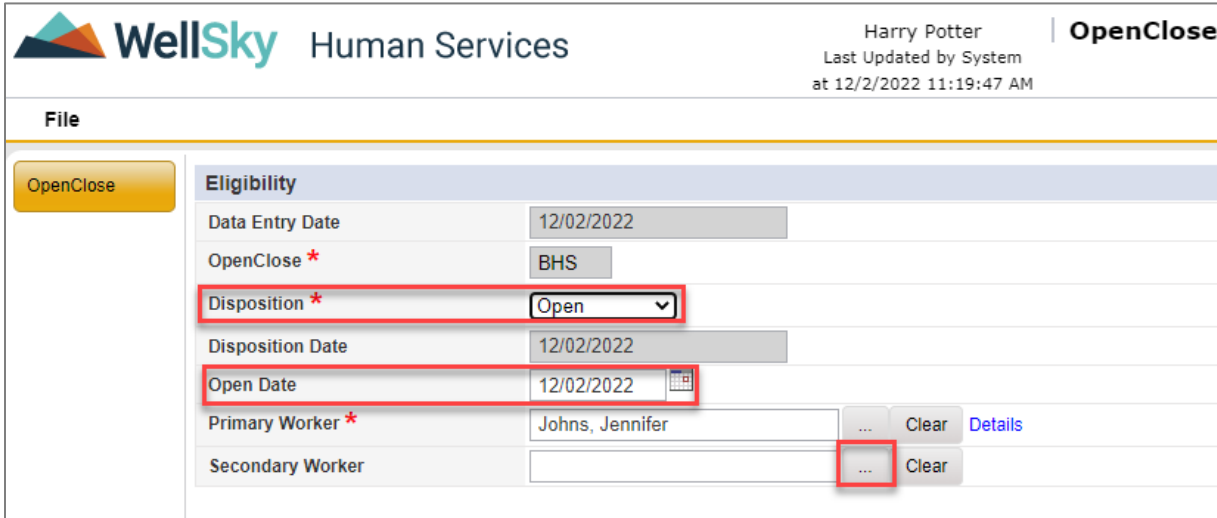
Caption: screen shot of Demographics page

- Once the demographic information has been entered. Select the **File** menu, then select **Save and Close Demographics**.



Caption: screen shot showing steps to Save and Close Demographics

4. The **OpenClose** page will automatically display.
  - a. Set **Disposition** = 'Open'.
  - b. Open Date defaults to "Today" but can be backdated if needed.
  - c. If a secondary worker is desired select the button shown below to look up and select the secondary worker.

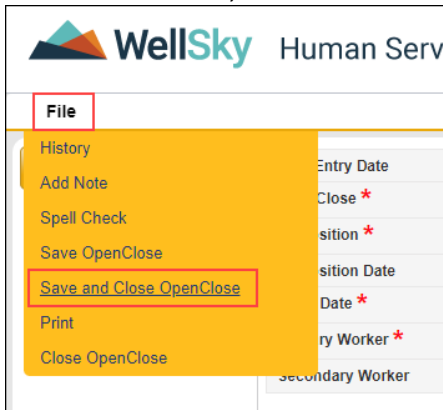


The screenshot shows the 'OpenClose' subpage in the WellSky Human Services interface. The page header includes the WellSky logo, 'Human Services', and user information for 'Harry Potter' with the text 'Last Updated by System at 12/2/2022 11:19:47 AM'. The 'OpenClose' title is in the top right. A 'File' menu is located on the left. The main form area is titled 'Eligibility' and contains the following fields:

- Data Entry Date: 12/02/2022
- OpenClose \*: BHS
- Disposition \*: Open (dropdown menu)
- Disposition Date: 12/02/2022
- Open Date: 12/02/2022 (calendar icon)
- Primary Worker \*: Johns, Jennifer (with '...' and 'Clear' buttons, and a 'Details' link)
- Secondary Worker: (with '...' and 'Clear' buttons)

Caption: screen shot of OpenClose subpage

- d. On the **File** menu, click **Save and Close OpenClose**.



The screenshot shows the 'File' menu open in the OpenClose subpage. The menu items are:

- History
- Add Note
- Spell Check
- Save OpenClose
- Save and Close OpenClose (highlighted with a red box)
- Print
- Close OpenClose

Caption: screen shot of OpenClose File menu

## Add Location Episode

1. After the previous step, a Workflow Wizard screen will appear.
2. Click on the link, **Add Location Episode**.

Caption: Screen shot of workflow wizard window after task is selected

3. Enter the enrollment details as appropriate.
  - a. OpenClose defaults to BHS.
  - b. Worker defaults to the current worker. *(If this needs to change, click the ellipse (...) next to the field and search for the last name of the new worker)*
  - c. Select the correct **Provider Location** from the list. There may be additional sites/locations listed, be sure to select the correct one.
  - d. Select the **Enrollment type**.
  - e. Select the appropriate **Disposition** from the dropdown. E.g., “Waiting List” or “Waiting List + Walk in Svc” or “Admitted/Open”, depending on scenario.
  - f. Disposition Date defaults to the current date, leave it as is.
  - g. Admit Date defaults to the current date but can be changed if needed.
  - h. If an expected discharge date is known, it can be entered.

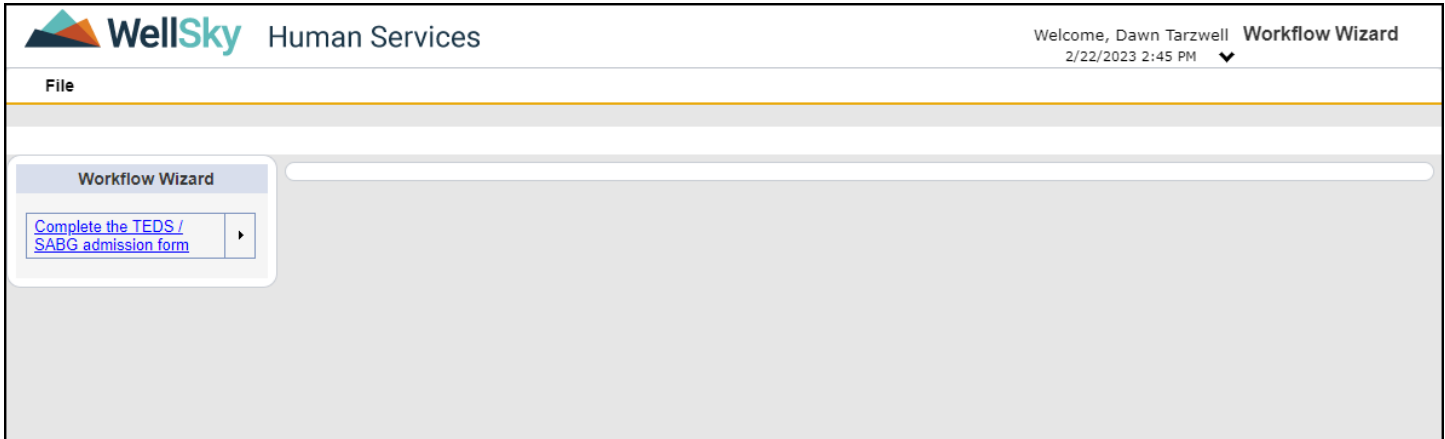
Caption: Screen shot of Location Episode fields and File menu

4. On the **File** menu, click **Save and Close Location Episode**.

If the disposition selected in the previous step was “Waiting List” then the client will stay on the waiting list until the disposition of the provider enrollment is changed. If “Waiting List + Walk in Svc” or “Admitted/Open” is chosen, then the workflow begins below. If a disposition of “Discharged/Closed” is selected, please refer to the Discharge Workflow document.

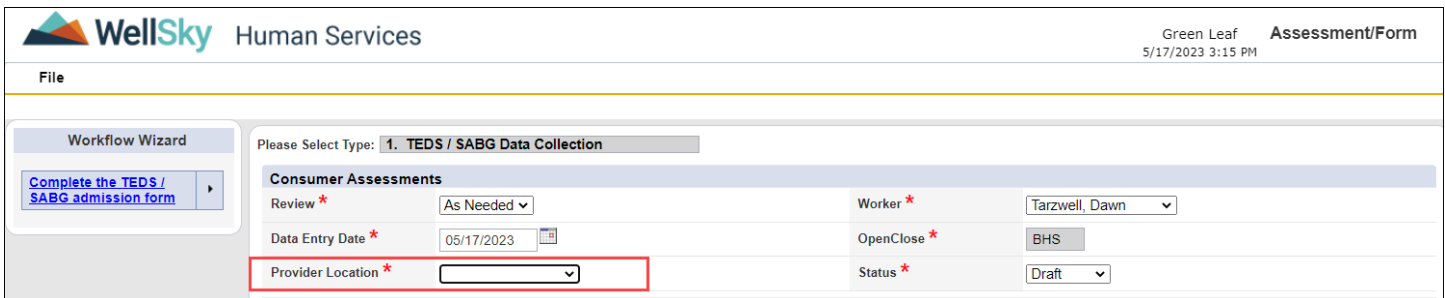
## Add Client Admission form for TEDS and SABG

1. After the previous step, a Workflow Wizard screen will appear.





Caption: Screen shot of workflow wizard window before task is selected

2. Click on the link, **Complete the TEDS / SABG admission form**. The form opens.
  - a. Note: If you are not ready to complete the form at this time you can close the window and access the tickler later from your My Work page.
3. Fill out the header section.
  - a. Select the correct provider location from the dropdown.
  - b. Worker defaults to current worker (person collecting the data). *(If this needs to change, click the ellipse (...) next to the field and search for the last name of the new worker)*
  - c. Leave Review and Data entry date as the default values.
  - d. Leave Status in Draft until data entry is finished.









































Caption: Screen shot showing header information on new assessment/form

	<p><b>Caution</b></p> <p>If you do not enter a provider location in the header you will NOT be able to save the form.</p>
---	---

4. Fill out all required fields in the form. A red asterisk indicates the field is required. *NOTE: Dimension 4 does not exist in this form.*
  - a. You can save this form in the status of “Draft” as often as you like without all required fields being filled in, but to “Complete” this form all required fields must be populated.
  - b. Fields with a circular arrow icon  on the right are synchronized fields. They will default with any data entered previously in the Demographics screen. Any data you enter into these fields will sync back to Demographics when you save the form.

Client Characteristics	
Date of Birth *	06/01/2000   ←

Caption: Screen shot showing one of the synchronized fields.

TEDS / SABG Data Collection	
<b>General Information</b>	
Client Transaction Type: *	Admission 
Client Type *	
Referral Source *	Employer/Employee Assistance Program (EAP) * 
Type of Treatment Service	
<b>Client Characteristics</b>	
Date of Birth *	06/01/2000  
Also known As	 
Race *	 
Hispanic Origin *	
Gender Assigned at Birth *	Female  
Gender Identity (GI) "How do you think of yourself as:" *	 
Sexual Orientation (SO) "Do you think of yourself as:" *	
Marital Status	 
Veteran *	 
Current Living Arrangement *	 
Street	 
State	Kansas  Clear 
County of Residence *	 Clear 
Home Phone	 
Yearly Household Income *	
Federal Poverty Level above or below 200% (Beacon Only)	 
Number of People in Household *	 
Do you have children in home you care for? *	
Number of Children at Risk in House *	
DCF Custody	

Caption: Screen shot showing details of the TEDS/SABG Data Collection form



Primary Source of Income *	<input type="text"/>
Funding Source *	<input type="text"/>
Health Insurance	<input type="text"/>
Payment Source, Primary (Expected or Actual) *	<input type="text"/>
Education Level *	<input type="text"/>
Employment Status *	<input type="text"/>
Detailed Not in Labor Force *	<input type="text"/>
Medicaid Number	<input type="text"/> <input type="button" value="↻"/>
DOC No (Department of Corrections number)	<input type="text"/>
ASO Number	<input type="text"/>
<b>DIMENSION 1 - ACUTE INTOXICATION AND/OR WITHDRAWAL</b>	
During the past 12 months, have you become restless, irritable, or anxious when trying to stop/cut down on gambling? *	<input type="text"/>
During the past 12 months, have you tried to keep your family or friends from knowing how much you gambled? *	<input type="text"/>
During the past 12 months did you have such financial trouble as a result of your gambling that you had to get help with living expenses from family, friends or welfare? *	<input type="text"/>
Tobacco / Nicotine Use? *	<input type="text" value="Smoked"/> <input type="text" value="Chewed"/> <input type="text" value="Vaped"/> <input type="text" value="None of the above"/>
Has client used tobacco/nicotine products in last 30 days? *	<input type="text"/>
Is the client participating in Medication-Assisted Opioid Therapy? *	<input type="text"/>
<b>Primary</b>	
Substance Use - Primary *	<input type="text"/>
Detailed Drug Code, Primary *	<input type="text"/>
Age at first use: Code Newborn as 00; Not Applicable as 96; Unknown as 97; Not Collected as 98.	
Age of First Use - Primary *	<input type="text"/>

Caption: Screen shot showing details of the TEDS/SABG Data Collection form

Frequency of Use - Primary *	<input type="text"/>
Route of Administration - Primary *	<input type="text"/>
<b>Secondary</b>	
Substance Use - Secondary *	<input type="text"/>
Detailed Drug Code, Secondary *	<input type="text"/>
Age of First Use - Secondary *	<input type="text"/>
Frequency of Use - Secondary *	<input type="text"/>
Route of Administration - Secondary *	<input type="text"/>
<b>Tertiary</b>	
Substance Use - Tertiary *	<input type="text"/>
Detailed Drug Code, Tertiary *	<input type="text"/>
Age of First Use - Tertiary *	<input type="text"/>
Frequency of Use - Tertiary *	<input type="text"/>
Route of Administration - Tertiary *	<input type="text"/>
Primary Diagnostic Code (ICD 10)	<input type="text"/> ...
<b>DIMENSION 2 - BIOMEDICAL CONDITIONS AND COMPLICATIONS</b>	
Pregnant? *	<input type="text"/>
<b>TB Risk Assessment Questions</b>	
Has client ever had a positive TB test or been told by a medical provider they have TB? *	<input type="text"/>
Is this person at higher risk for being infected with TB bacteria, or developing Active TB Disease based upon criteria outlined in KDADS policy or CDC guidance? *	<input type="text"/>
<p>If the person is considered higher risk, the client should be evaluated for the following symptoms of TB disease within the last month: feelings of sickness or weakness, weight loss, fever, night sweats, coughing, chest pain, and the coughing up of blood.</p> <p><a href="https://www.cdc.gov/tb/publications/factsheets/general/tb.htm">https://www.cdc.gov/tb/publications/factsheets/general/tb.htm</a></p> <p>▲ Hide Text</p>	
If the client is exhibiting symptoms described above, has this person been reported to the local health department or a primary care physician for TB screening, evaluation and treatment? *	<input type="text"/>
Has the client been given education about TB infection and disease? *	<input type="text"/>

Caption: Screen shot showing details of the TEDS/SABG Data Collection form

Is your facility providing case management (or care coordination) to the person in need of TB services (45 CFR 96.127)? \*

SUD providers should report all suspected or confirmed cases of TB Disease, TB suspect, and Latent TB Infection to the State TB Office via phone call (877-427-7317) or fax (785- 559-4224) within 4 hours of suspicion or confirmation and in accordance with Federal and State Confidentiality requirements.

Hide Text

Have you tested positive for HIV/AIDS \*

**DIMENSION 3 - EMOTIONAL, BEHAVIORAL OR COGNITIVE CONDITIONS**

Is the client currently being treated for any mental health issues? \*

Co-occurring Mental and Substance Use Disorders

Prescribed Psychotropic Medications \*

**DIMENSION 5 - CONTINUED PROBLEM POTENTIAL**

Has the client participated in self-help groups or support groups (e.g. AA, NA, etc.) in the last 30 days? \*

Client Has Treatment History \*

Days waiting: Enter number of days as 000–996. Code Unknown as 997 and Not Collected as 998.

Days waiting to Enter Substance Use Treatment

**DIMENSION 6 - LIVING ENVIRONMENT**

Arrest Record

Number of Arrests: Enter number of arrests as 00–96. Code Unknown as 97 and Not Collected as 98.

Number of Arrests in Last 30 days \*

Detailed Criminal Justice Referral \*

Caption: Screen shot showing details of the TEDS/SABG Data Collection form

5. When finished entering all of the data, go back to the top of the screen and change the Status to **Complete**.
  - a. Click OK to the message stating “By changing the status of this record, all required fields must be completed before the record can be saved. Do you want to continue?”
  - b. On the **File** menu, click **Save and Close Assessment/Form**.

Caption: Screen shot showing the Save and Close Assessment/Form menu option

- c. If you missed any required fields, they will be marked with a message in red like below. Correct these then repeat step b above.

Number of People in Household \*

Number of People in Household is a Required Field.

Caption: Screen shot showing an example of a required field missing

- d. Click **OK** to the message stating, “The save was successful and demographics data has been updated.”
6. When the **1. TEDS / SABG Data Collection** Assessment/form is saved with a status of “Complete”, a workflow wizard will trigger 60 days later to remind the user to discharge the client.
7. Data will be sent to TEDS automatically in the next submission.

## Add OPTIONAL Kansas Assessment

If you are not already in the client's record, access it now, using the steps under [Access existing client record](#).

1. Click the **Assessments/Forms** tab.

The screenshot shows the WellSky Human Services interface for client 'Smith, Anne (10011)'. A menu bar includes 'File', 'Edit', 'Tools', 'Reports', and 'Ticklers'. Below the menu, a row of tabs is visible: 'Demographics', 'OpenClose', 'Provider Enrollments', 'Episodes', 'Assessments/Forms' (highlighted with a red box), 'Diagnosis', 'Medications', and 'Notes'.

Caption: Screen shot of client's tabs

2. On the **File** menu, click **Add Assessment/Form**
  - a. In the **Please Select Type:** dropdown, select **2. Kansas Assessment**
  - b. Fill out the header section.
    - i. Select the correct provider from the dropdown.
    - ii. Worker defaults to current worker (person collecting the data). *(If this needs to change, click the ellipse (...) next to the field and search for the last name of the new worker)*
    - iii. Leave Review and Data entry date as the default values.
    - iv. Leave Status in Draft until data entry is finished.

The screenshot shows the 'Add Assessment/Form' header in WellSky Human Services. The 'Please Select Type:' dropdown is set to '2. Kansas Assessment'. Below this, the 'Consumer Assessments' section contains several fields: 'Review \*' (As Needed), 'Data Entry Date \*' (05/17/2023), 'Provider Location \*' (highlighted with a red box), 'Worker \*' (Tarzwell, Dawn), 'OpenClose \*' (BHS), and 'Status \*' (Draft). The top right corner shows 'Green Leaf Assessment/Form' and the date '5/17/2023 3:54 PM'.

Caption: Screen shot showing header information on new assessment/form

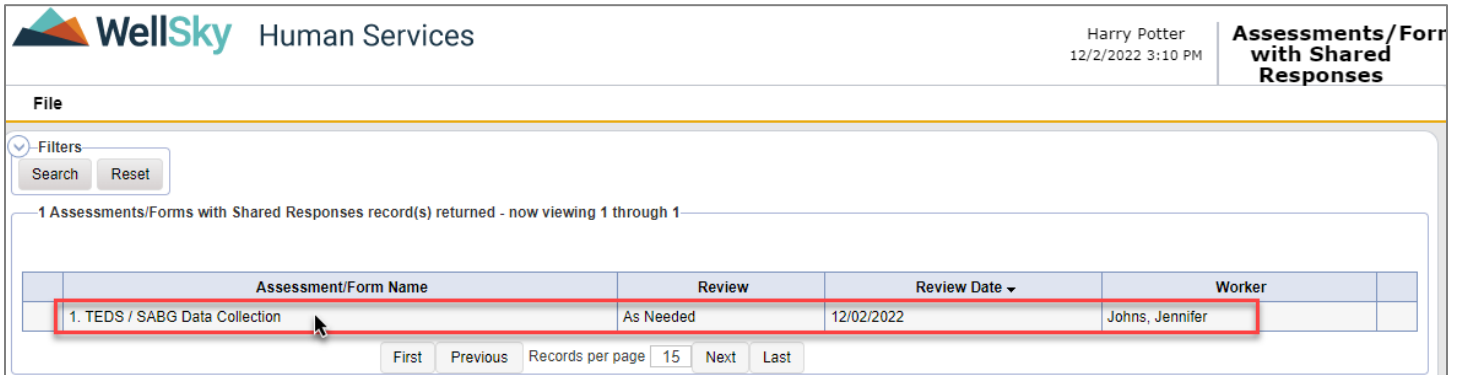
	<p><b>Caution</b></p> <p>If you do not enter a provider location in the header you will NOT be able to save the form.</p>
--	---

3. From the **File** menu, select **Copy Shared Response**.

The screenshot shows the 'File' menu in WellSky Human Services. The 'Copy Shared Response' option is highlighted with a red box. Other menu items include 'Spell Check', 'Save Assessment/Form', 'Save and Close Assessment/Form', 'Copy From Previous', 'Print', and 'Close Assessment/Form'. Below the menu, the 'KANSAS ASSESSMENT' header is visible, with fields for 'First Name: \*' (Anne) and 'Last Name: \*' (Smith).

Caption: Screen shot showing Copy Shared Response menu.

- a. Select the most recent **1. TEDS / SABG Data Collection** form.



WellSky Human Services

Harry Potter  
12/2/2022 3:10 PM

**Assessments/Forms with Shared Responses**

File

Filters  
Search Reset


1 Assessments/Forms with Shared Responses record(s) returned - now viewing 1 through 1

Assessment/Form Name	Review	Review Date ▼	Worker
1. TEDS / SABG Data Collection	As Needed	12/02/2022	Johns, Jennifer



First Previous Records per page 15 Next Last

Caption: Screen shot showing the assessments/forms with shared responses

- b. All the previously answered questions will be automatically populated in the new Assessment/Form.



**Tip**  
Copy Shared Response can be used to copy from previously completed forms, e.g., when the same client has a new treatment episode.

4. Fill out the rest of the form.
  - a. Fields with a circular arrow icon  on the right are synchronized fields. They will default with any data entered previously in the Demographics screen. Any data you enter into these fields will sync back to Demographics when you save the form.
  - b. Fields with a chain link icon  on the right have their answers pulled from a previous assessment if the question was answered there (Copy Shared Response).

Human Services

Anne Smith  
 Last Updated by dtarzwel  
 at 2/23/2023 1:51:05 PM

---

File Reports

---

**2. Kansas Assessment**

**Consumer Assessments**

Review *	As Needed ▼	Worker *	Tarzwel, Dawn	Clear Details
Data Entry Date *	02/23/2023	OpenClose *	BHS ▼	
Provider *	Sample Provider 1 ▼	Status *	Draft ▼	

---

**KANSAS ASSESSMENT**

First Name: *	Anne	↻	
Last Name: *	Smith	↻	

**General Information**

SSN: *	XXX-XX-5555	↻ Unmask	
Date of Birth: *	06/01/2000	↻	
Age at Screening: *	25		
Client Type *	Codependent/Collateral ▼	↻	
Payment Source, Primary (Expected or Actual) *	Blue Cross/Blue Shield ▼		
Medicaid Number: *	123	↻	
DOC No *	2356		
Referral Date: *	02/22/2023		
Referral Source: *	Employer/Employee Assistance Program (EAP) ▼	↻	
Gender Assigned at Birth: *	Female ▼	↻	
Gender Identify (GI): "Do you think of yourself as" *	Female or Woman ▼	↻	
Sexual Orientation (SO): "Do you think of yourself as" *	Straight or Heterosexual ▼	↻	

Caption: Screen shot showing details of the 2. Kansas Assessment

- c. You can save this form in the status of “Draft” as often as you like without all required fields being filled in, but to “Complete” this form all required fields must be populated.
5. When finished entering all of the data, go back to the top of the screen and change the **Status** to **Complete**.
    - a. Click OK to the message stating “By changing the status of this record, all required fields must be completed before the record can be saved. Do you want to continue?”
    - b. On the **File** menu, click **Save and Close Assessment/Form**.

Human Services

---

**File**  
 Spell Check  
**Save Assessment/Form**  
 Copy From Previous  
 Print  
 Close Assessment/Form

Please Select Type: **1. TEDS / SABG Data Collection**

---

**Consumer Assessments**

Review *	As Needed ▼	Worker *	Tarzwel, Dawn
Data Entry Date *	02/22/2023	OpenClose *	BHS
Provider *	Sample Provider 1 ▼	Status *	Complete ▼

Caption: Screen shot showing the Save and Close Assessment/Form menu option

- c. If you missed any required fields, they will be marked with a message in red like below. Correct these then repeat step b above.


Number of People in Household *	<input type="text"/>	Number of People in Household is a Required Field. 
---------------------------------	----------------------	--

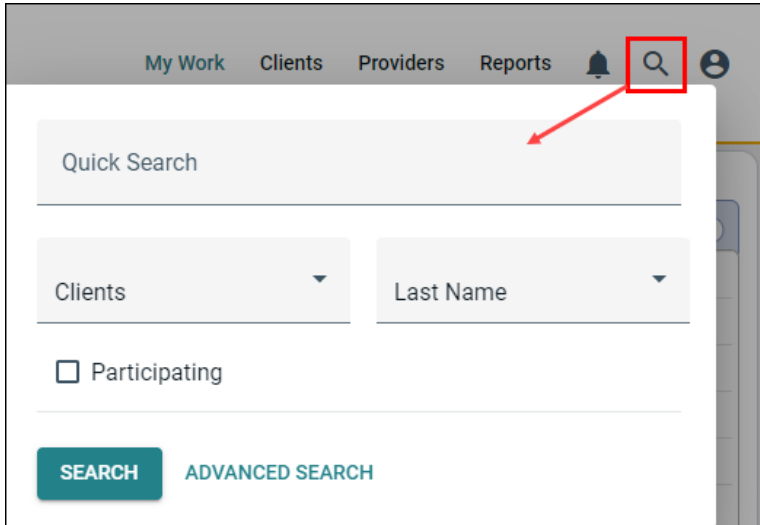
Caption: Screen shot showing an example of a required field missing

- d. If you get a message stating, “The save was successful and demographics data has been updated.”, click **OK**.



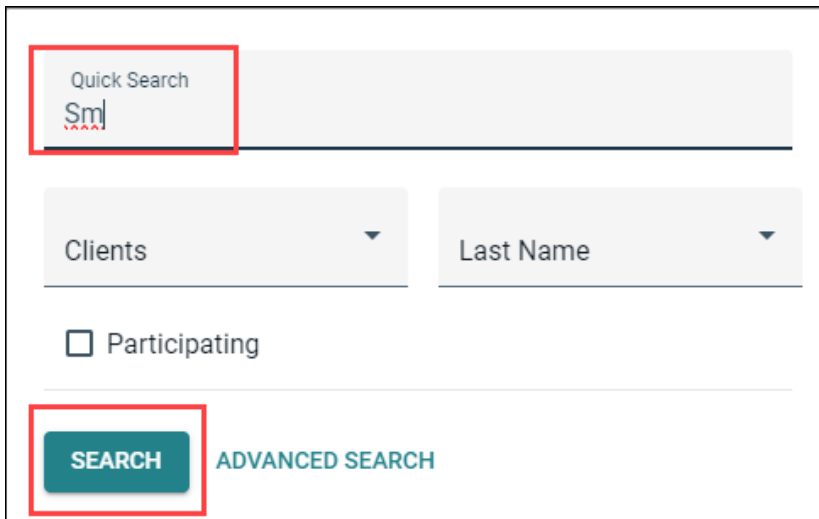
## Access existing client record

1. Access the client record through quick search.
  - a. Click the **search magnify glass** icon  in the upper right-hand corner of the screen. It should look like the screen below. If needed, change the dropdown in the middle of the screen to “Clients” and “Last Name”.



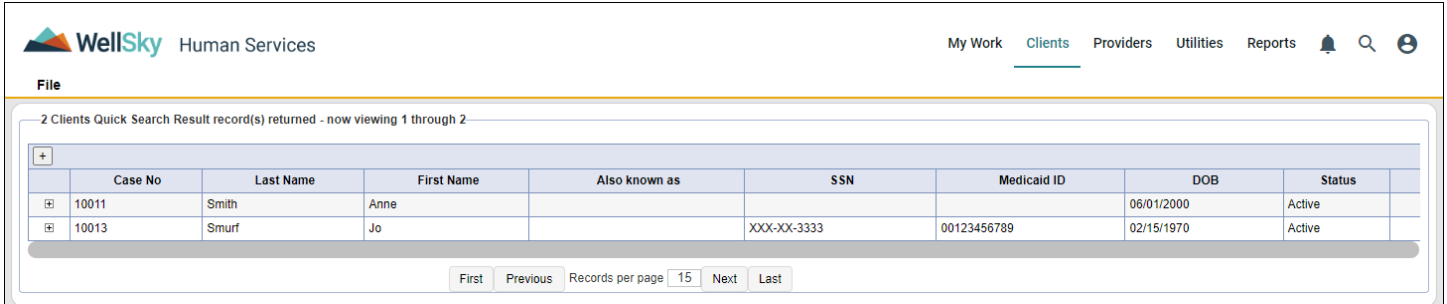
Caption: Screen shot of the quick search window when first opened

- b. Where it says “Quick Search” enter the first few letters of the client’s last name. Click **Search**.



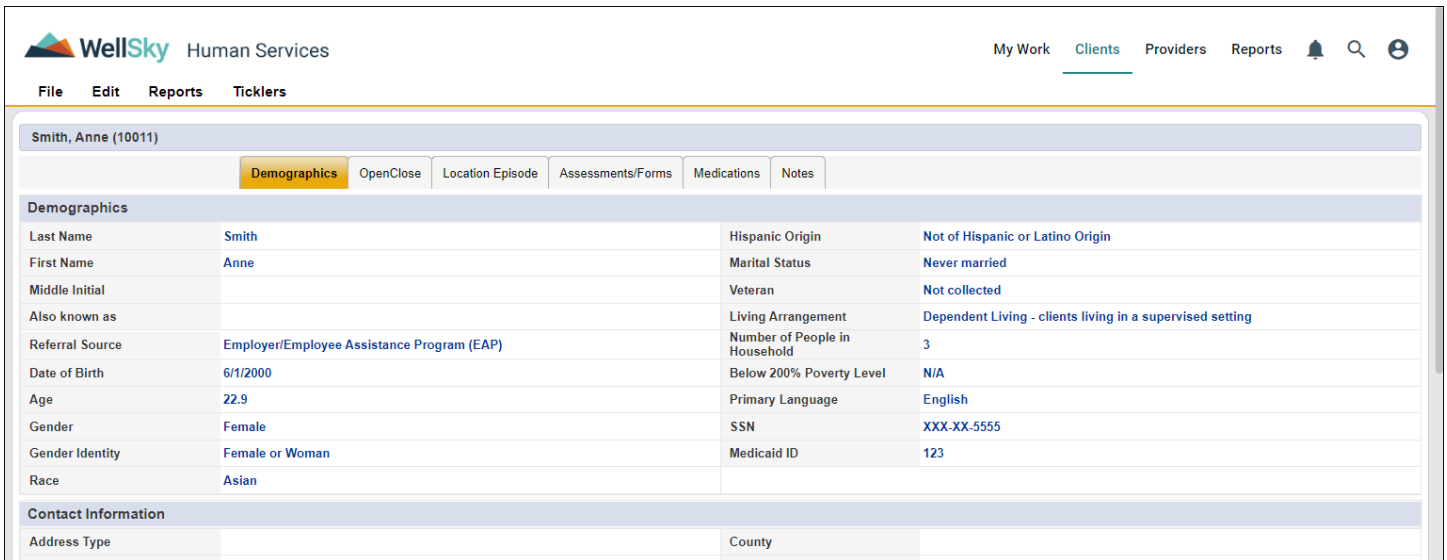
Caption: Screen shot of the quick search window with the start of a last name entered (“Sm”)

- c. If only one match is found, the system will automatically take you to the record, if not, a list of matches will be shown. **Select** the correct one from the list by clicking anywhere in the row.



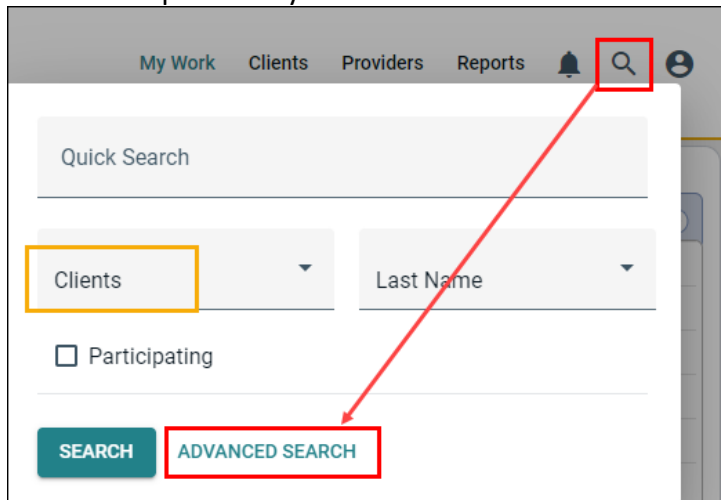
Caption: Screen shot of Quick Search results

- d. You are now on the client record.



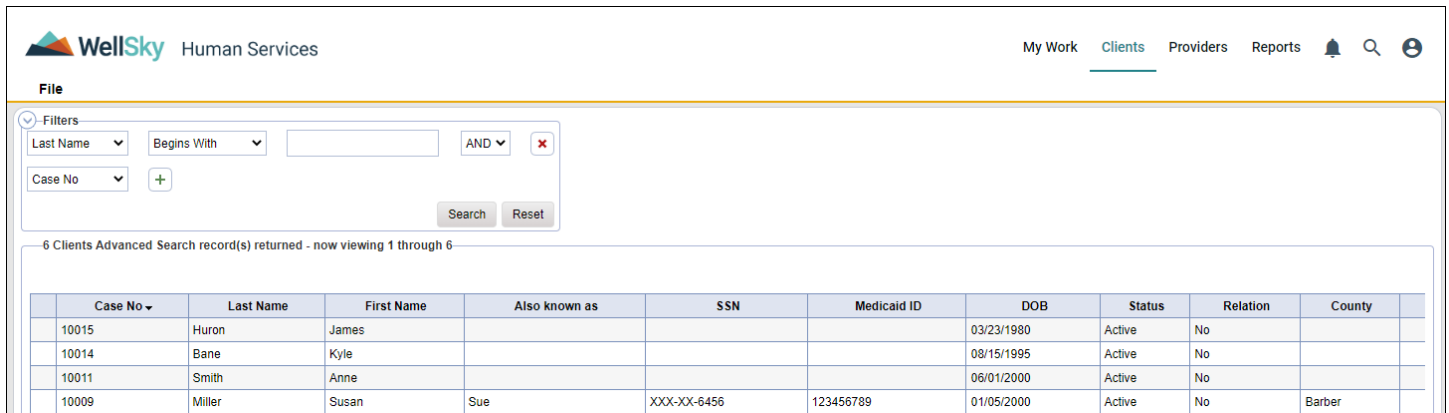
Caption: Screen shot of a client's record

- 2. Alternately, you can access the client record through advanced search. This can be helpful when the quick search returns too many potential matches, or when you only have partial information.
  - a. Click the **search magnify glass** icon in the upper right-hand corner of the screen. Be sure the first dropdown says "Clients". Click **Advanced Search**.



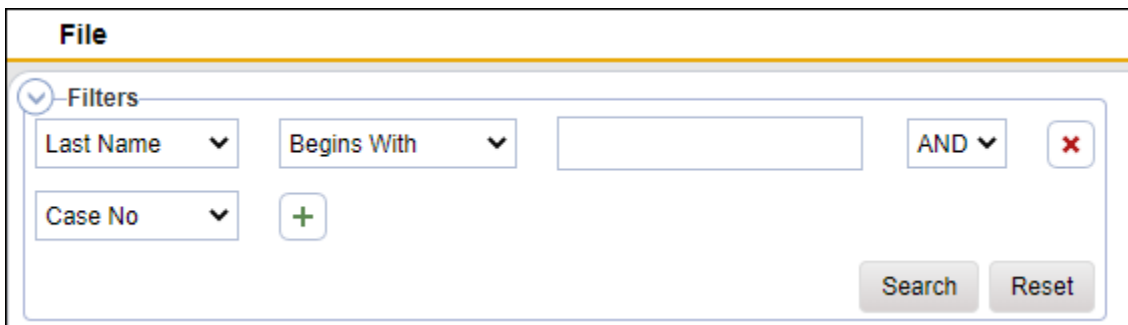
Caption: Screen shot of the search window when first opened

- b. The Advanced Search screen appears and by default shows all clients you have permission to see.



Caption: Screen shot of advanced search screen with results shown.

- c. The list can be filtered to show less records by using the filters section.



Caption: Screen shot of filter section of Advanced Search window

- d. Multiple filters can be used at once. Add additional fields with the plus sign **+** and remove them with the red X **X**.
- e. Once the correct record is found, click anywhere within the row to go to the client record.

## Alternate Workflow: Open a new Location Episode for an existing client

1. If you are not already in the client’s record, access it now, using the steps under [Access existing client record](#).
2. Click the **OpenClose** tab. Look at the Disposition.

The screenshot shows the WellSky Human Services interface for client Leaf, Green (10030). The 'OpenClose' tab is selected and highlighted with a red box. Below the tabs, there is a filter section with 'OpenClose' selected. The main table displays one record with the following data:

OpenClose	Open Date	Disposition	Close Date	Primary Worker	Secondary Worker
BHS	05/17/2023	Open		Tarzwel, Dawn	

Caption: Screen shot of OpenClose list view.

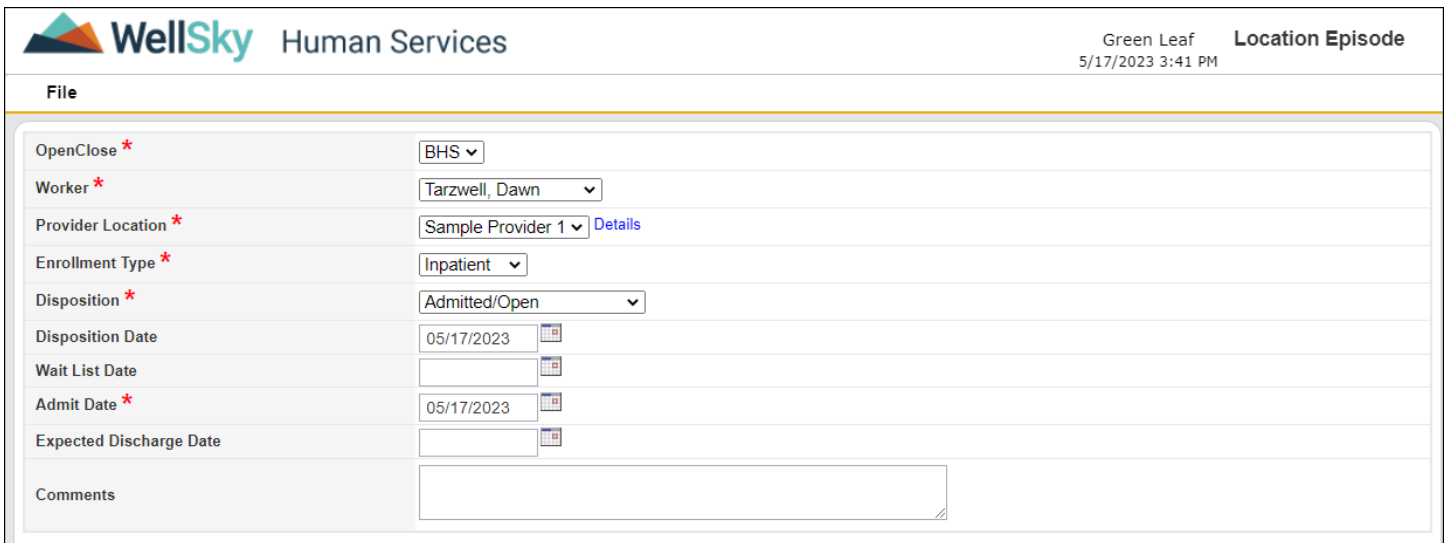
- a. If the Disposition = Open, skip to Step 3.
  - b. If the Disposition = Pending:
    - i. Click anywhere on the row to open the record
    - ii. Change Disposition to Open
    - iii. On the **File** menu, click **Save and Close OpenClose**.
    - iv. Continue to follow the workflow for a new client, starting at [Add Location Episode](#).
  - c. If the Disposition = Closed:
    - i. On the **File** menu, click **Add OpenClose**.
    - ii. Set OpenClose to BHS.
    - iii. Set Disposition to Open.
    - iv. Adjust the Open Date and worker if needed.
    - v. On the **File** menu, click **Save and Close OpenClose**.
    - vi. Continue to follow the workflow for a new client, starting at [Add Location Episode](#).
3. Click the **Location Episode** tab. There may or may not be records there already.

The screenshot shows the WellSky Human Services interface for client Leaf, Green (10030). The 'Location Episode' tab is selected and highlighted with a red box. Below the tabs, there is a filter section with 'Disposition' set to 'Not Equal To'. The main table displays one record with the following data:

OpenClose	Provider Location	Worker	Disposition	Admit Date	Discharge Date
BHS	Sample Provider 1	Tarzwel, Dawn	Discharged/Closed	05/12/2023	05/17/2023

Caption: Screen shot of Client record, Location Episode tab list view.

4. On the **File** menu, click **Add Location Episode**.
  - a. OpenClose will default to BHS.
  - b. Worker defaults to the current worker. *(If this needs to change, click the ellipse (...) next to the field and search for the last name of the new worker.)*
  - c. Select the correct **Provider Location** from the list. There may be additional sites/locations listed, be sure to select the correct one.
  - d. Select the correct **Enrollment Type** from the list.
  - e. Select the appropriate **Disposition** from the dropdown. E.g., “Waiting List” or “Waiting List + Walk in Svc” or “Admitted/Open”, depending on scenario.
  - f. Disposition Date defaults to the current date, leave it as is.
  - g. Admit Date defaults to the current date but can be changed if needed.
  - h. If an expected discharge date is known, it can be entered.



The screenshot shows the 'Location Episode' form in the WellSky Human Services application. The form is titled 'File' and contains the following fields:

- OpenClose \***: BHS
- Worker \***: Tarzwell, Dawn
- Provider Location \***: Sample Provider 1 (with a 'Details' link)
- Enrollment Type \***: Inpatient
- Disposition \***: Admitted/Open
- Disposition Date**: 05/17/2023
- Wait List Date**: (empty)
- Admit Date \***: 05/17/2023
- Expected Discharge Date**: (empty)
- Comments**: (empty text area)

The top right of the form displays 'Green Leaf' and the date/time '5/17/2023 3:41 PM'.

Caption: Screen shot of Location Episode fields.

- i. On the **File** menu, click **Save and Close Provider Enrollments**.
5. Continue to follow the workflow for a new client, starting at [Add Client Admission form for TEDS and SABG](#).