![WellSky logo]

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.

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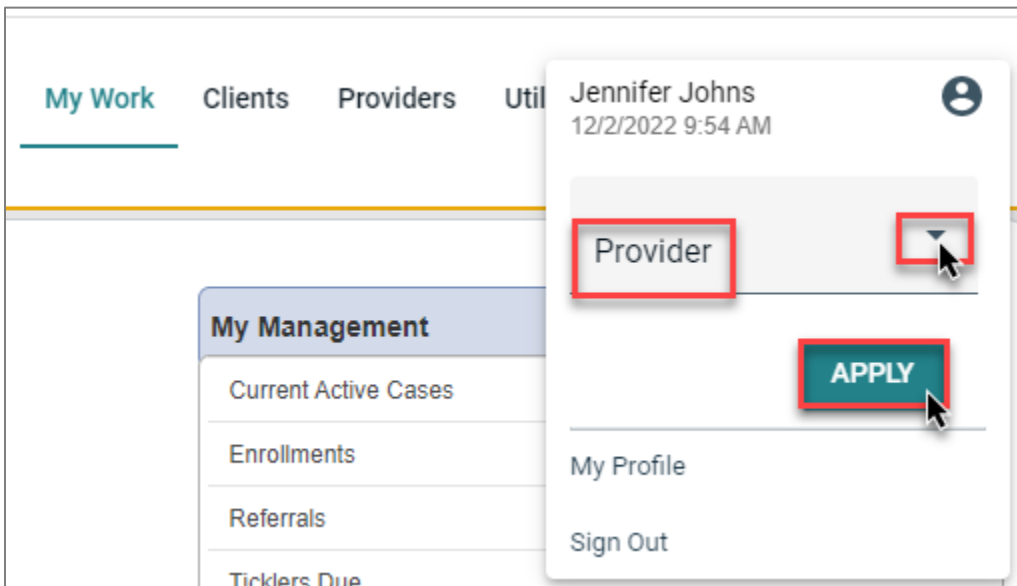
Caption: screen shot of the role being applied to the page

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.
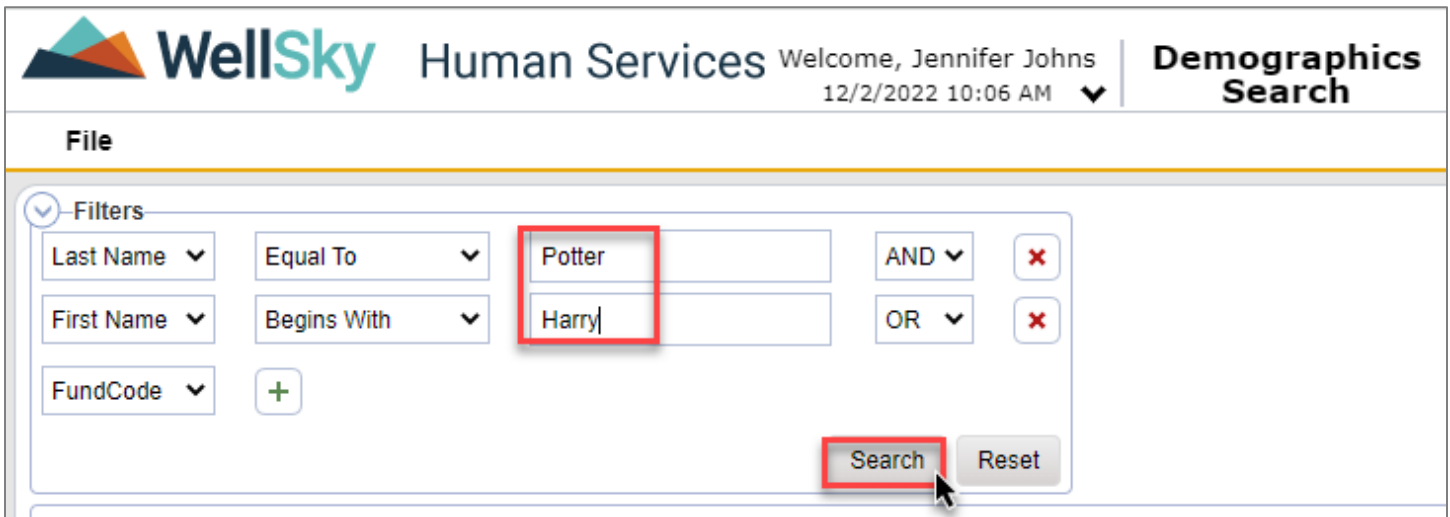   i.   If you need to narrow the results you can type in the client's last name and click **Search**.

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**.

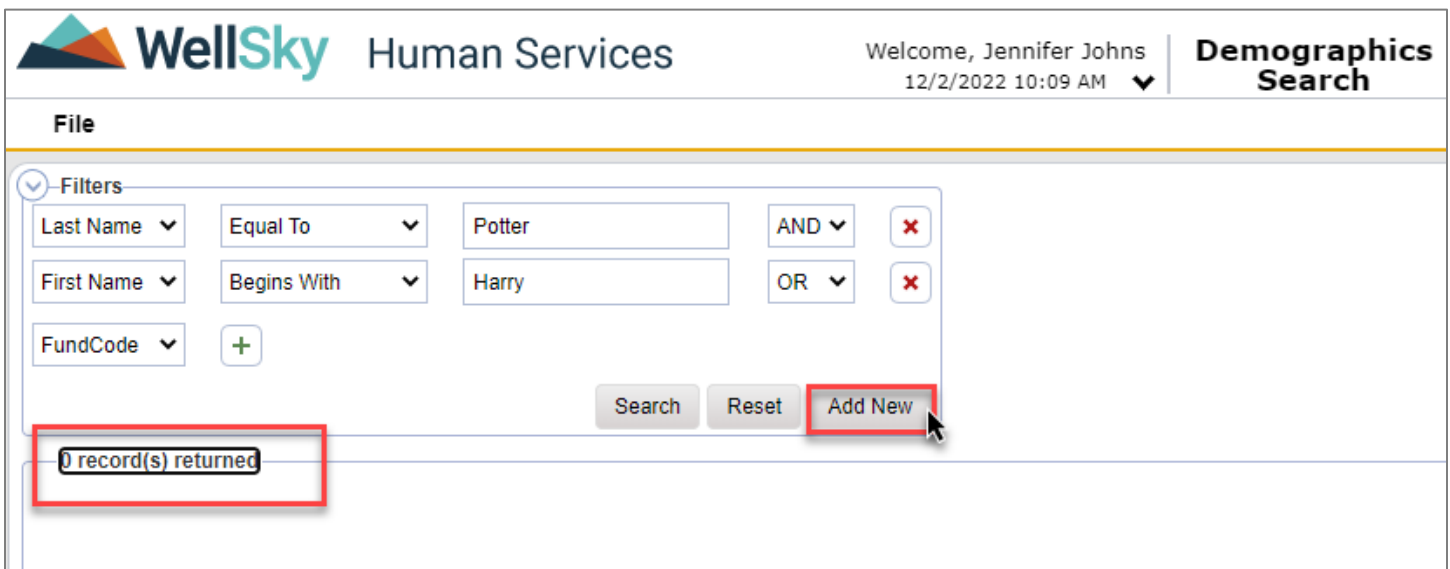Caption: screen shot showing Add New Demographic Search in the file menu

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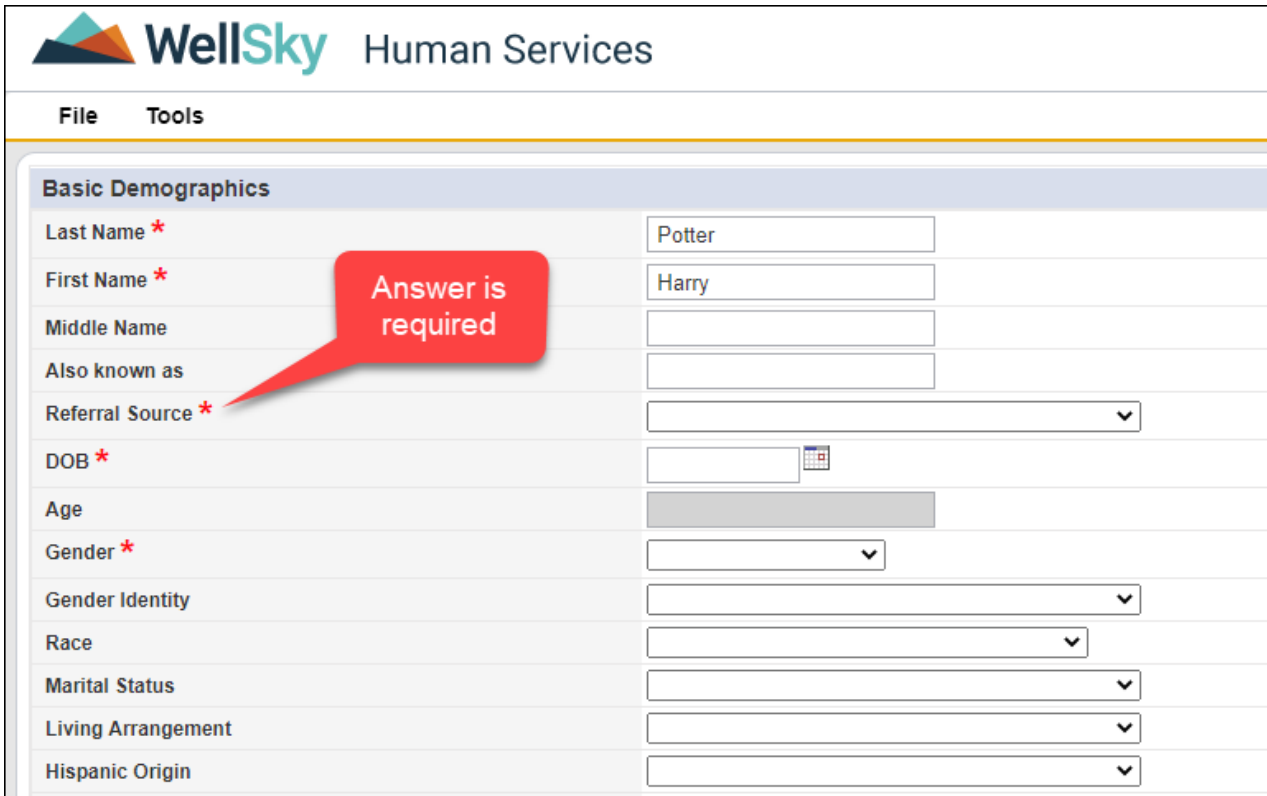

Caption: screen shot of new demographic search

   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.
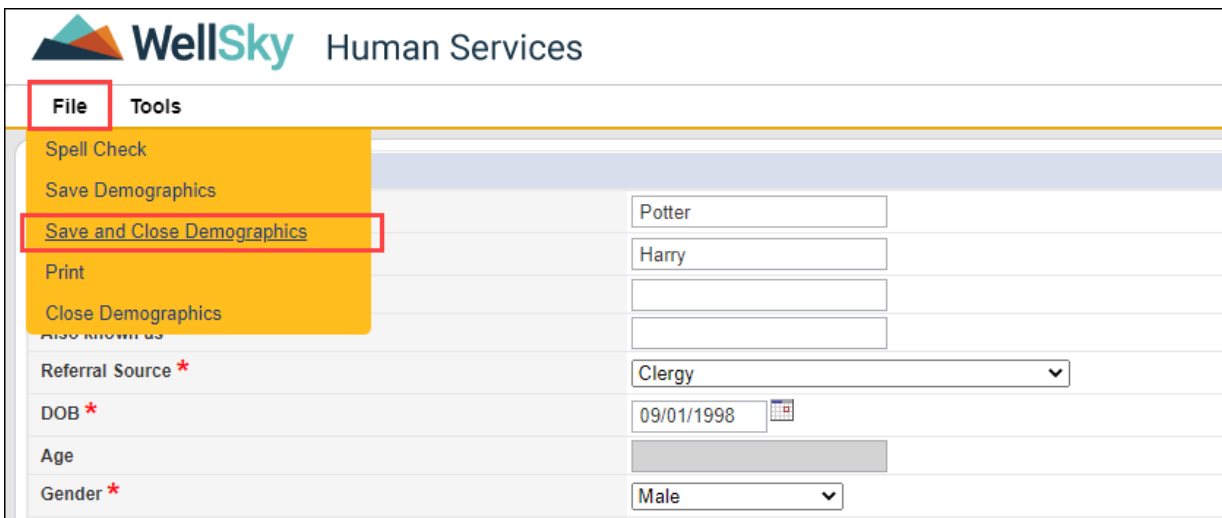

Caption: screen shot of step to Add New client

3. 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.
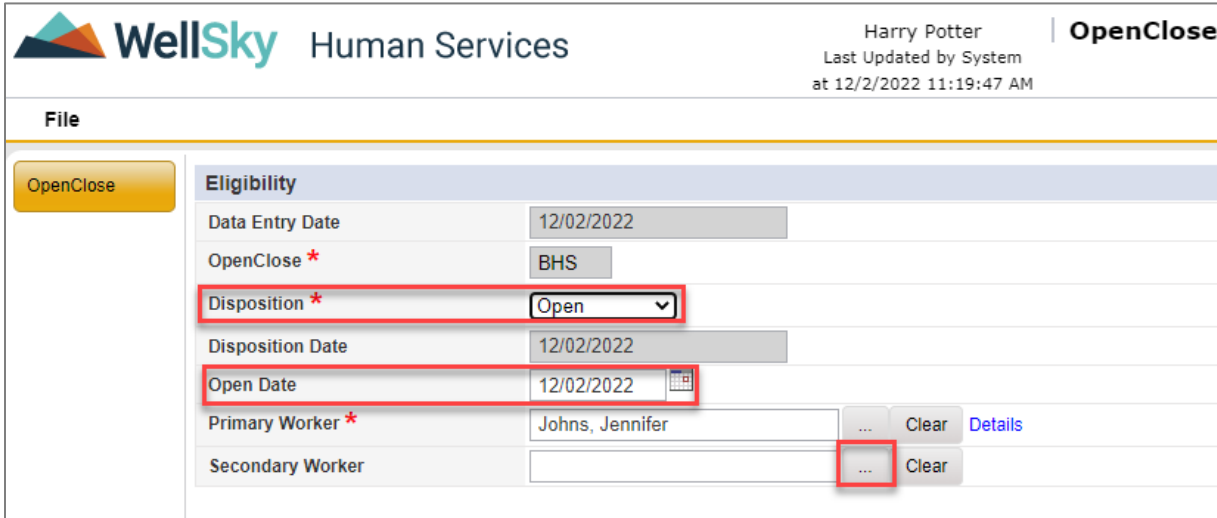

Caption: screen shot of Demographics page

   a. 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.
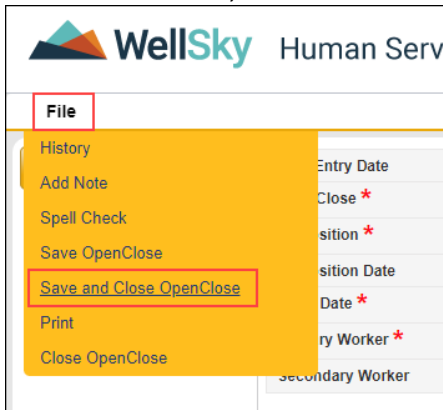   c. If a secondary worker is desired select the button shown below to look up and select the secondary worker.

Caption: screen shot of OpenClose subpage

    d. On the **File** menu, click **Save and 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.
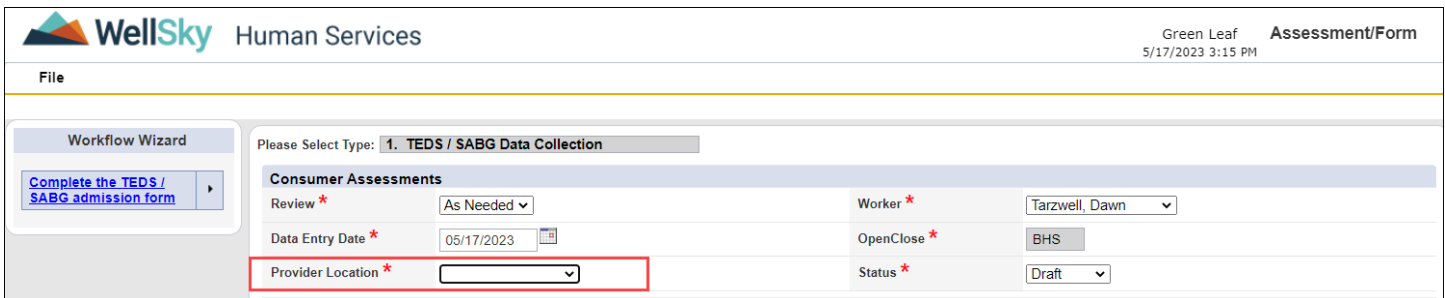
Add Client Admission form for TEDS and SABG

1. After the previous step, a Workflow Wizard screen will appear.
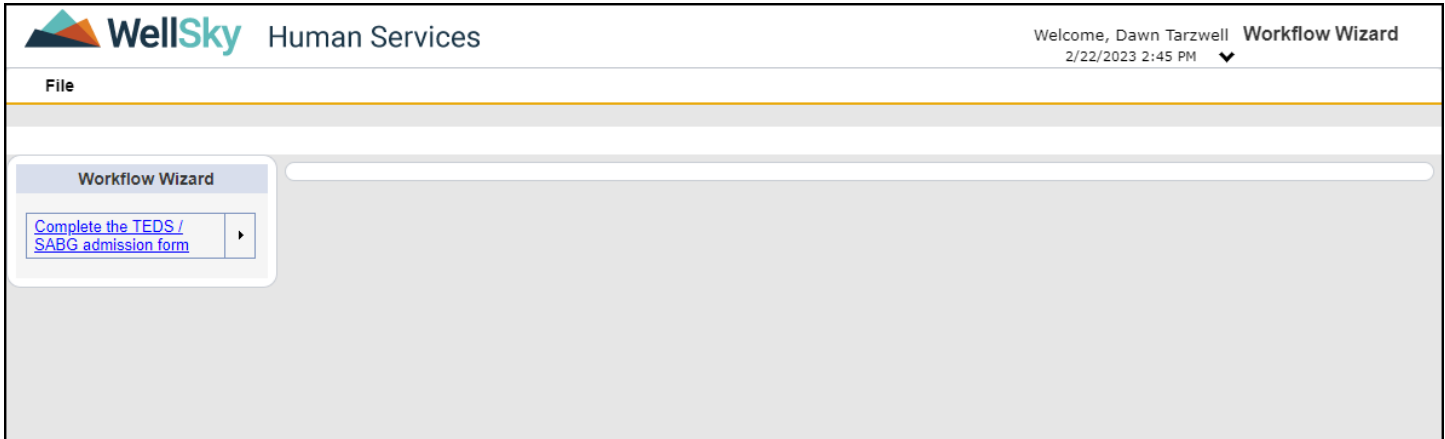
Caption: Screen shot of workflow wizard window before task is selected

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

⚠ CAUTION	**Caution**
	If you do not enter a provider location in the header you will NOT be able to save the form.

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

General Information

Client Transaction Type: *	Admission ▾
Client Type *	▾
Referral Source *	ployer/Employee Assistance Program (EAP ▾ *	↻
Type of Treatment Serv	▾

Answer is required (callout pointing to Client Transaction Type)

Client Characteristics

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	▾

Symbol indicates field is linked to Demographics (callout pointing to Date of Birth ↻)

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

Primary Source of Income *	⏷
Funding Source *	⏷
Health Insurance	⏷
Payment Source, Primary (Expected or Actual) *	⏷
Education Level *	⏷
Employment Status *	⏷ *
Detailed Not in Labor Force *	⏷ *
Medicaid Number	⟳
DOC No (Department of Corrections number)	
ASO Number	

DIMENSION 1 - ACUTE INTOXICATION AND/OR WITHDRAWAL

During the past 12 months, have you become restless, irritable, or anxious when trying to stop/cut down on gambling? *	⏷
During the past 12 months, have you tried to keep your family or friends from knowing how much you gambled? *	⏷
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? *	⏷
Tobacco / Nicotine Use? *	Smoked Chewed Vaped None of the above
Has client used tobacco/nicotine products in last 30 days? *	⏷
Is the client participating in Medication-Assisted Opioid Therapy? *	⏷

Primary

Substance Use - Primary *	⏷
Detailed Drug Code, Primary *	⏷

Age at first use: Code Newborn as 00; Not Applicable as 96; Unknown as 97; Not Collected as 98.

Age of First Use - Primary *	

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

| Frequency of Use - Primary * | [dropdown] |
| Route of Administration - Primary * | [dropdown] |

Secondary

Substance Use - Secondary *	[dropdown]
Detailed Drug Code, Secondary *	[dropdown]
Age of First Use - Secondary *	[text field]
Frequency of Use - Secondary *	[dropdown]
Route of Administration - Secondary *	[dropdown]

Tertiary

Substance Use - Tertiary *	[dropdown]
Detailed Drug Code, Tertiary *	[dropdown]
Age of First Use - Tertiary *	[text field]
Frequency of Use - Tertiary *	[dropdown]
Route of Administration - Tertiary *	[dropdown]
Primary Diagnostic Code (ICD 10)	[text field] [...]

DIMENSION 2 - BIOMEDICAL CONDITIONS AND COMPLICATIONS

| Pregnant? * | [dropdown] |

TB Risk Assessment Questions

| Has client ever had a positive TB test or been told by a medical provider they have TB? * | [dropdown] |
| 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? * | [dropdown] |

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.

https://www.cdc.gov/tb/publications/factsheets/general/tb.htm

▲ Hide Text

| 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? * | [dropdown] |
| Has the client been given education about TB infection and disease? * | [dropdown] |

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

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.

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.

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.

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

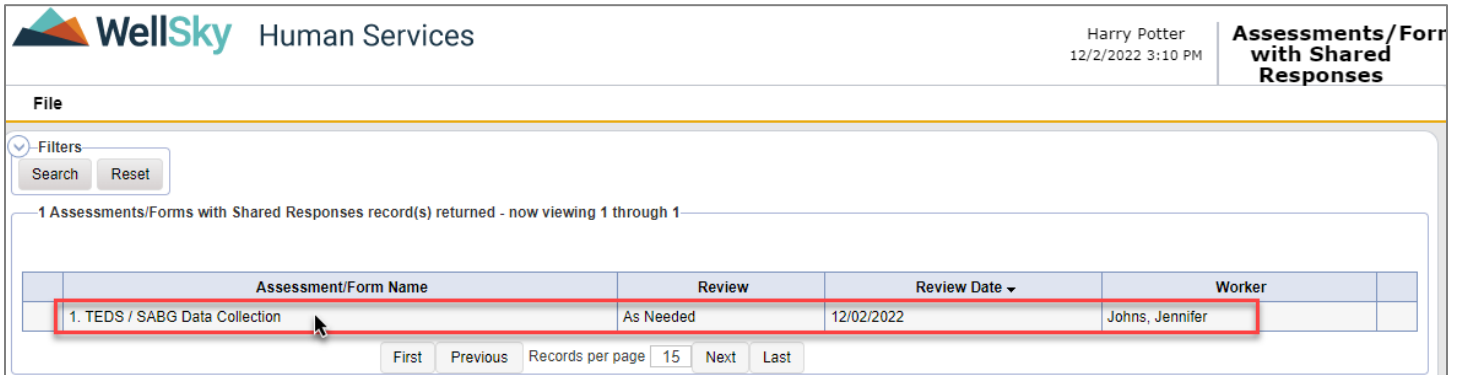| ⚠ CAUTION	**Caution**
	If you do not enter a provider location in the header you will NOT be able to save the form.

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

Caption: Screen shot showing Copy Shared Response menu.

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

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).

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**.

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

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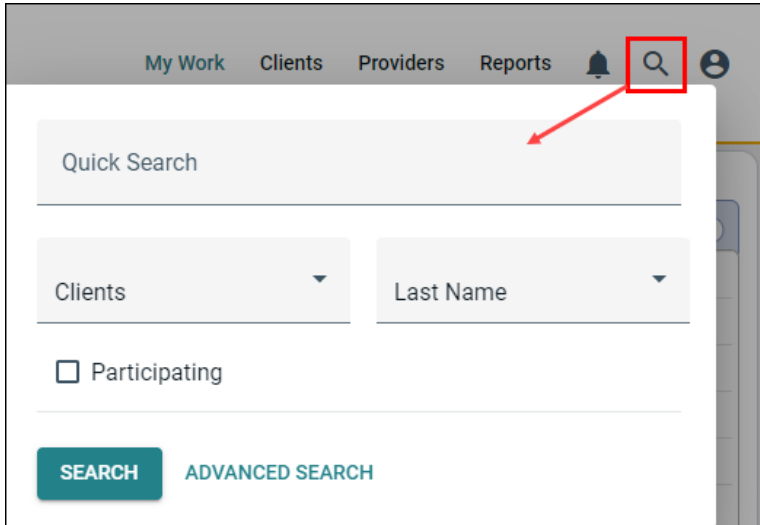
Caption: Screen shot of the quick search window when first opened

    b. Where it says "Quick Search" enter the first few letters of the client's last name. Click **Search**.
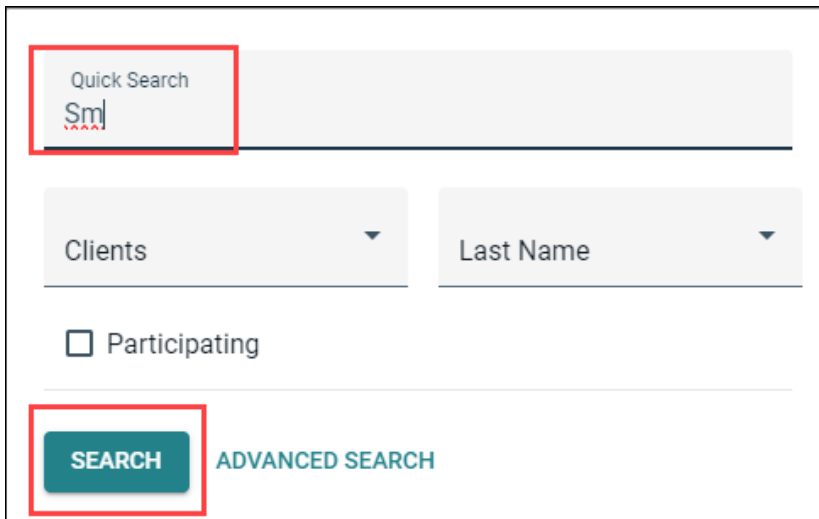
Caption: Screen shot of the quick search window with the start of a last name entered ("Sm")

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

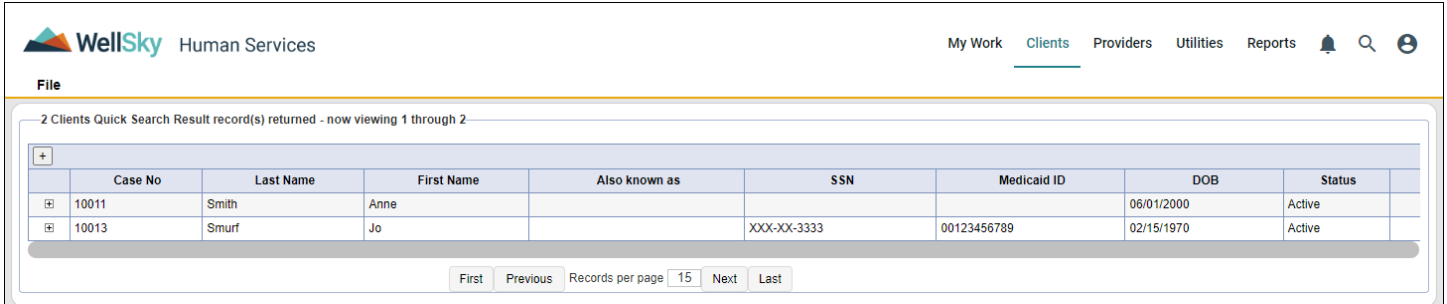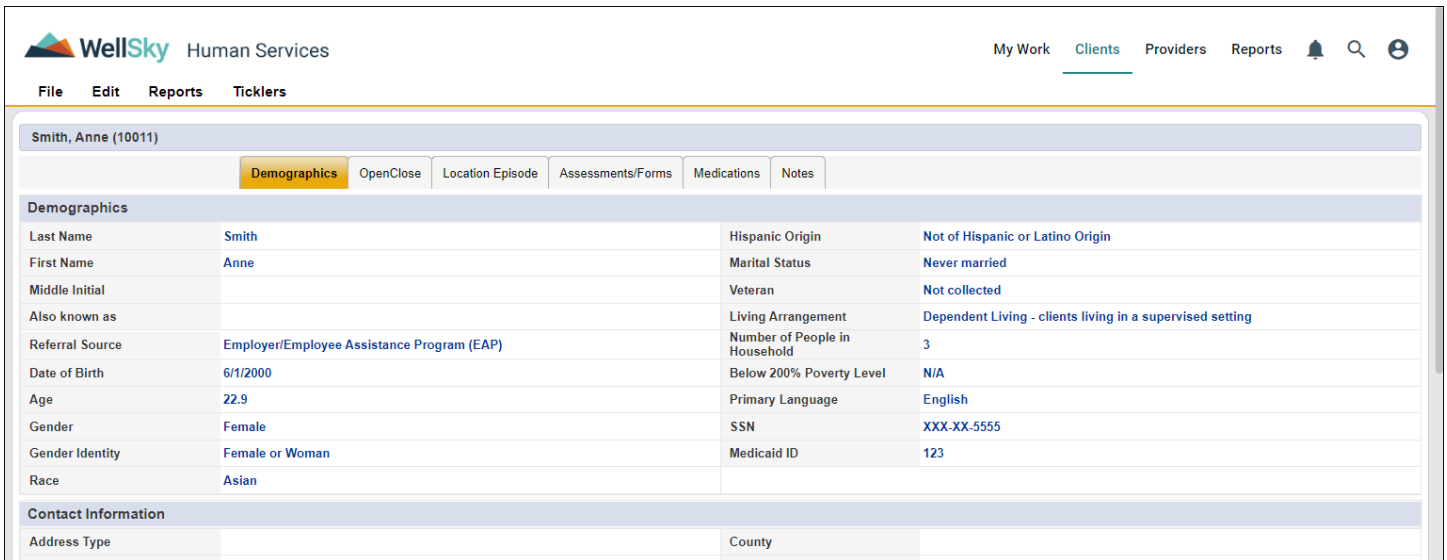d. You are now on the client record.

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**.
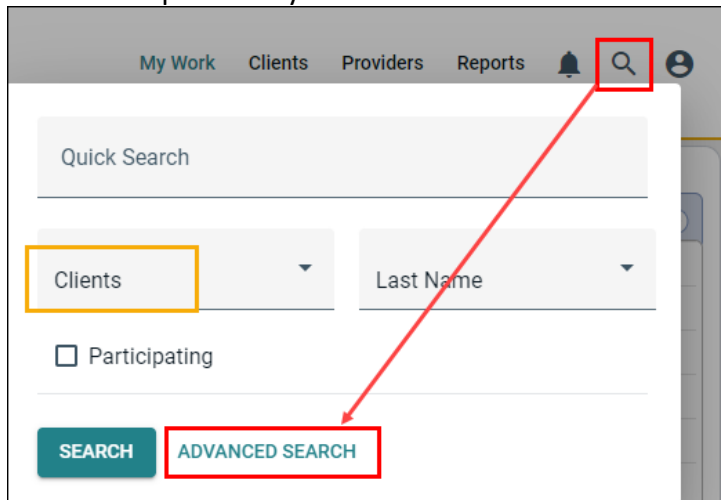
Caption: Screen shot of the search window when first opened

b. The Advanced Search screen appears and by default shows all clients you have permission to see.
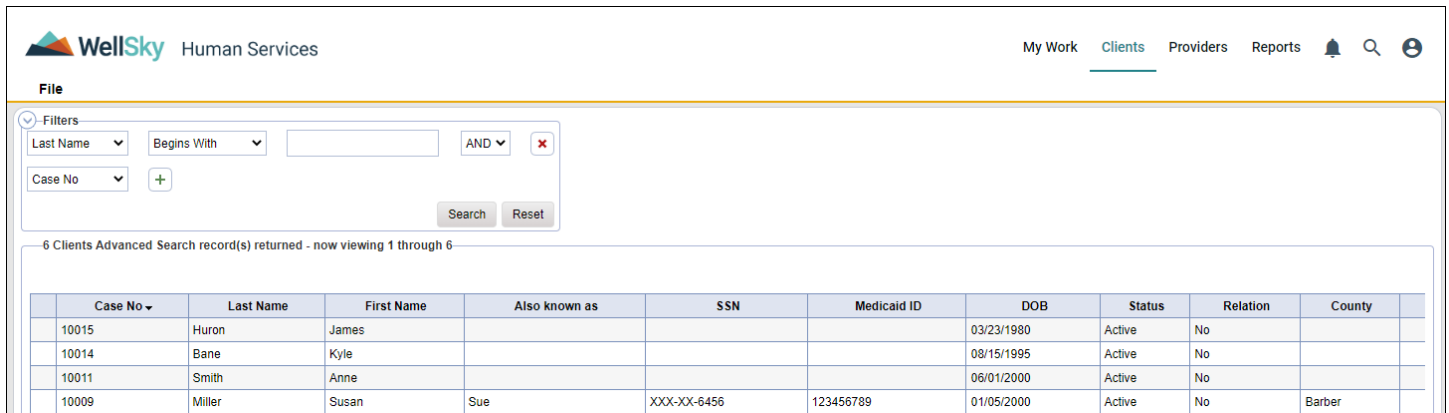
Caption: Screen shot of advanced search screen with results shown.

c. The list can be filtered to show less records by using the filters section.
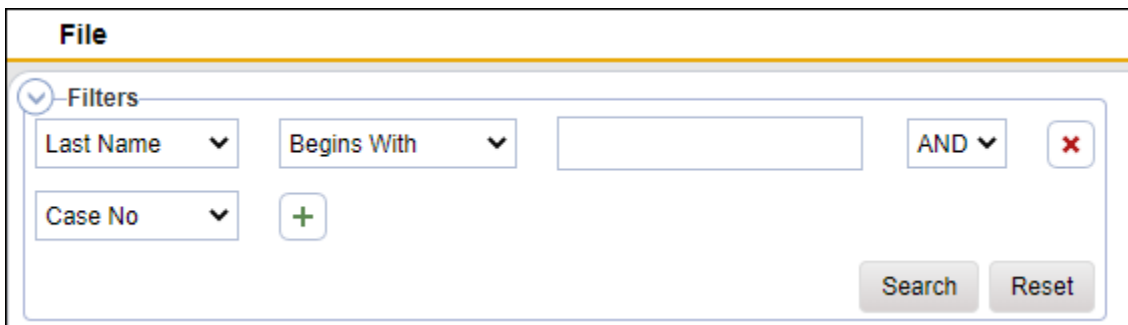
Caption: Screen shot of filter section of Advanced Search window

d. Multiple filters can be used at once. Add additional fields with the plus sign [+] and remove them with the red X [×] .

e. Once the correct record is found, click anywhere within the row to go to the client record.

![WellSky logo]

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.

Caption: Screen shot of OpenClose list view.
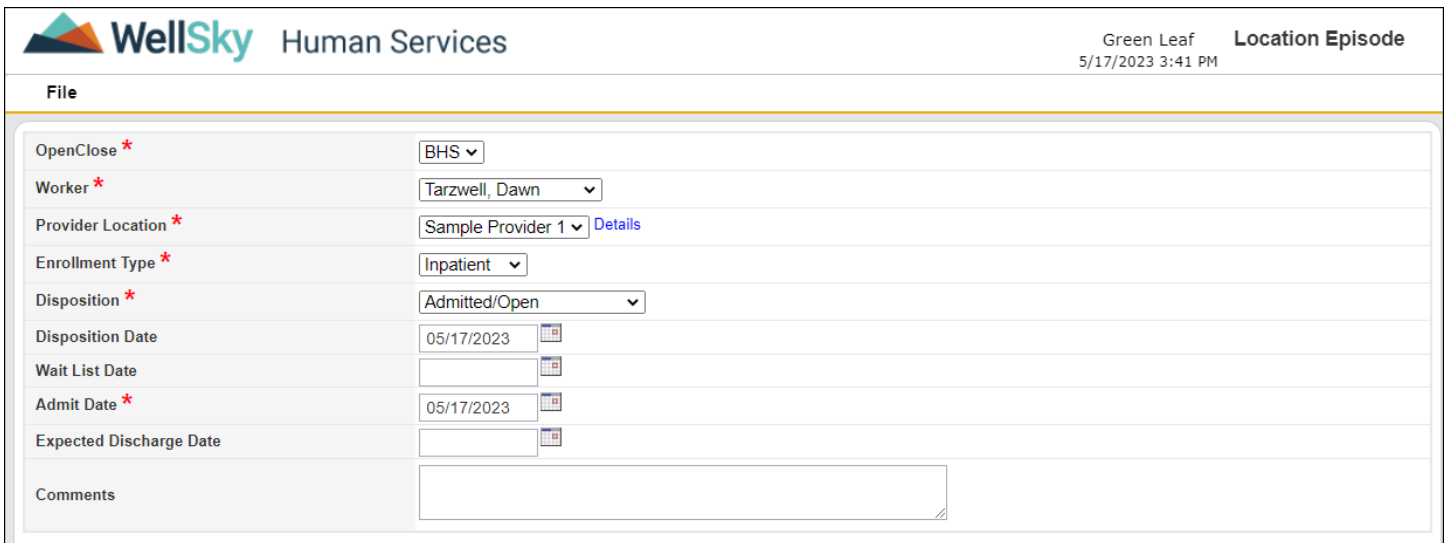
    a. If the Disposition = Open, skip to Step 3.
    b. If the Disposition = Pending:
        i. Click anywhere on the row to open the record
        ii. Change Disposition to Open
        iii. On the **File** menu, click **Save and Close OpenClose**.
        iv. Continue to follow the workflow for a new 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.

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.

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.