



Winter 2022

WellSky Human Services

Mobile Assessments User Guide

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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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Introduction

Welcome to WellSky Human Services Mobile Assessments, the tool you can use to conduct comprehensive assessments, either online or offline, using your mobile device: phone, tablet, or laptop. After you download assessment form and consumer information you can create assessments even where no internet connection is available. When you connect to the internet again, you can synchronize that assessment data with the WellSky Human Services application.

This powerful assessment tool lets you work from the field and eliminates redundant data entry and paper trails. You'll use Mobile Assessments much the same way you use the WellSky Human Services application, so the navigation and functions might be familiar. Simply download your consumers to your device, conduct your assessment, and synchronize the records when you are connected to the internet.

Note: Mobile Assessments works best with WellSky Human Services versions 8.3.4 and above. Earlier versions of WellSky Human Services will work with Mobile Assessments version 1.6.

Mobile device and browser compatibility

Mobile Assessments is compatible with the following devices and browsers. All internet browsers should be recent versions (within the past year). Use the same mobile device and internet browser while working with Mobile Assessments to ensure that all data is available.

- Windows/Mac/Linux devices:
 - Internet Explorer 11
 - Microsoft Edge
 - Google Chrome
 - Firefox
 - Safari
- Mobile devices using the Apple Operating System (iOS®), such as the Apple iPhone & iPad
 - iPhone 5+
 - iPad 4th generation+
 - iPad Mini
 - Safari

- Mobile devices using the Android™ Operating System
 - Chrome 38+
 - Firefox

Note:

Deleting your browser cache / temporary internet files will permanently remove all consumer and assessment data from your mobile device and will prevent you from working in offline mode. If you delete your browser cache, you must log into Mobile Assessments while connected to the internet before being able to use the offline mode again.

Use the same mobile device and internet browser while working with Mobile Assessments to ensure that all data is available.

Using the same device

You can use a variety of mobile devices to access Mobile Assessments, but you should not download the same consumer records to more than one device at a time. When you download consumer records, they are saved to the local device storage. Use the same mobile device to update these assessments or create new assessments to ensure that the data synchronizes correctly when you connect to the internet. After you synchronize your changes, updates to those records are saved to WellSky Human Services.

Starting with an application shortcut

Mobile Assessments is a web-based program. To use it offline, you must create a shortcut to it on your mobile device. After your first successful login, create a shortcut following the instructions for your particular operating system and browser.

Open the Mobile Assessments application

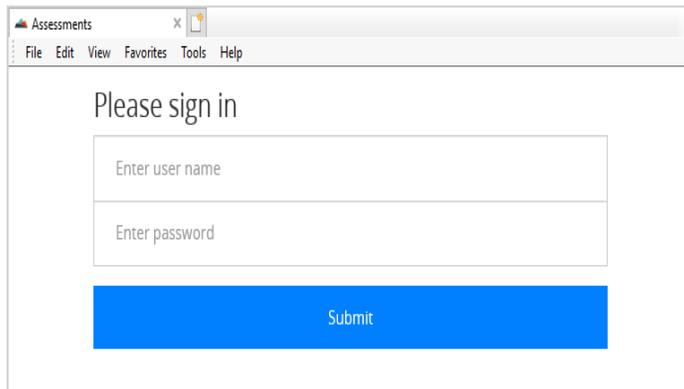
Use your device's internet browser to open the Mobile Assessments URL. To make access easier, save a browser bookmarks or URL shortcut before you need to use the application.

To open Mobile Assessments use the Mobile Assessments URL (or a bookmark or shortcut). Your system administrator should be able to provide this URL.

To sign In

1. Open the mobile assessment URL using an internet browser on your mobile device.
2. Enter your **User Name** and **Password**. This user name and password is the same one you use when you sign in to the WellSky Human Services application.

3. Click **Submit**.



When you log into Mobile Assessments, the application will automatically synchronize assessment files with the device to ensure that the necessary files and features are available for both online and offline use. These files include the following:

- Assessment Forms: The list of all screen designs (forms) that can be used based the user's Access Role and privileges.
- Downloaded Consumers: An update to all previously downloaded consumers, if any exist.

As system files are synchronized, a notification is displayed at the bottom of the screen.



A final notification will be displayed when synchronization is complete:

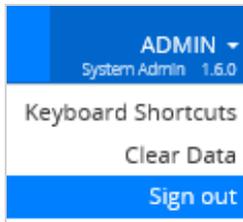


Note: Follow the same steps to sign in to Mobile Assessments when your device is not connected to the internet.

To Sign Out

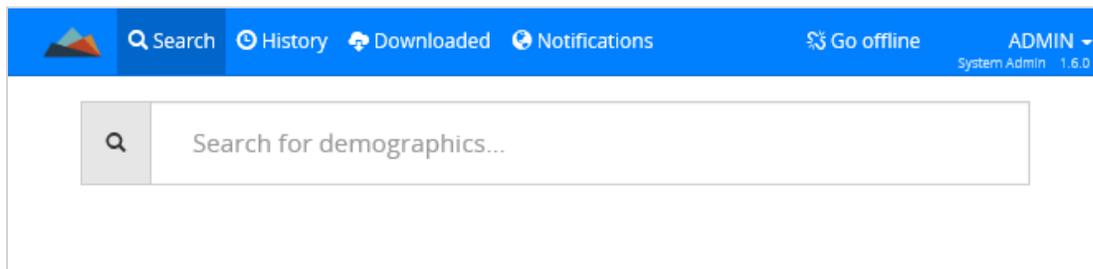
When you have finished using Mobile Assessments you will need to sign out of the application.

1. Click the down arrow next to your user name in the upper right portion of the screen.
2. Click **Sign Out**.



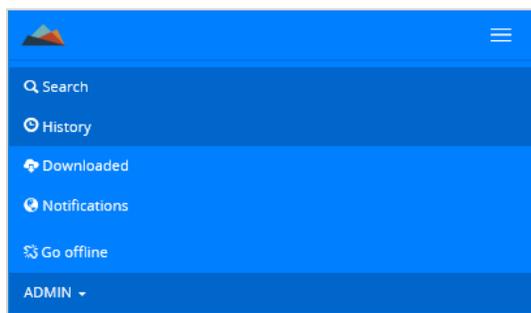
Getting Started

When the application is launched the menu bar, your user ID, and your application role are displayed at the top of the screen. The menu includes five options: Search, History, Downloaded, Notifications, and Go offline. At the right of the screen you will see your login name, role, and system version information.



Working with Smaller Screens

If you are working on a smaller screen, you will open the menu from the menu button in the upper right corner. Click the menu button  to open the menu. Click the menu button again to collapse it.



To Switch Between Online and Offline Mode

You can use Mobile Assessments in offline mode even when an internet connection is available. You might choose to work offline to check that consumer records are available offline, or to

continue working in offline mode until you are ready to synchronize your records.

- To work offline, click the **Go offline** button  on the menu bar. A confirmation message is displayed. Click **Yes**. The Go offline button toggles to display the Go online button.
- To return to work online, click the **Go online** button .

Download Consumer Records

Mobile Assessments provides the ability to temporarily store consumer and assessment information, so you can conduct face-to-face assessments from any location.

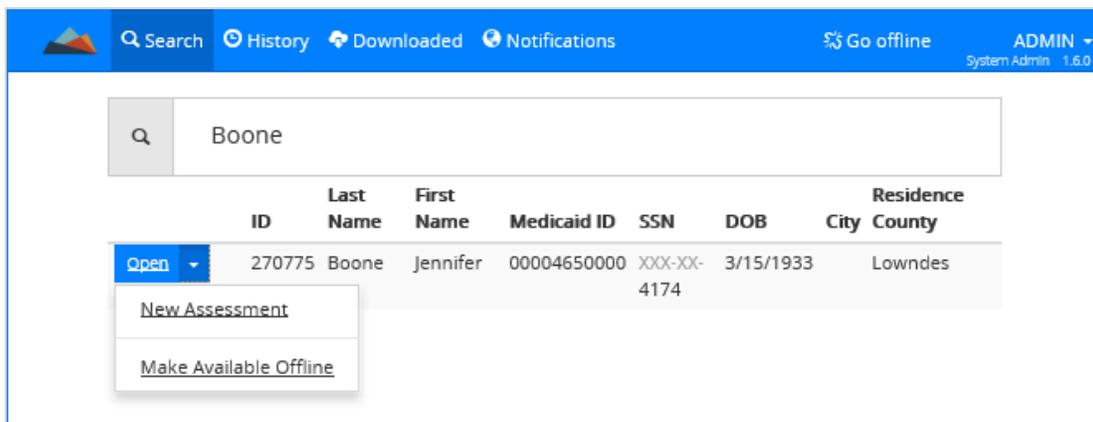
- Assessments that you conduct while your mobile device is connected to a cellular or network connection are synchronized with WellSky Human Services in real time.
- Assessments that you conduct while offline can be synchronized with a single click the next time the mobile device is connected to the internet.

Before you conduct an assessment, you must download the consumer onto the device. We recommend that you download this information before the assessment appointment even if you're planning to have an internet connection available. This will protect against unexpected internet connection problems while in the field.

Note: Use the same mobile device and internet browser when you work with downloaded consumer records to ensure that all data is available.

To download consumer records

1. Log in to Mobile Assessments while connected to the internet.
2. Select **Search** from the top menu bar.
3. Search for the consumer records by entering the case number, last name of the consumer, date of birth (DOB), social security number (SSN) or Medicaid ID.



4. Locate the consumer record in the search results.
5. Click the arrow next to the **Open** button.
6. Select **Make Available Offline**.

You will see system messages that confirm the record is downloaded and available for use.



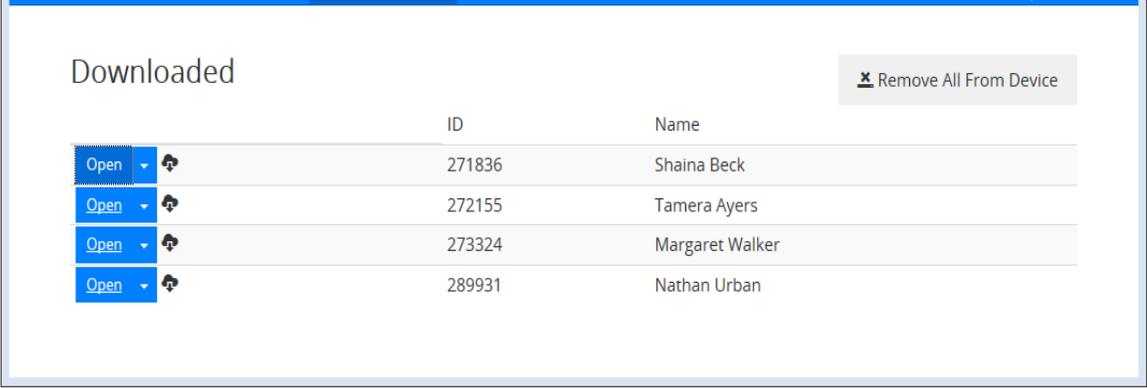
Downloading Assessment - Drake, Shelia (278180) - Criticality Summary - 11/10/2008...

7. The consumer files are now available for use on your mobile device.

Display Downloaded Records

To display records that have been downloaded.

1. On the Mobile Assessments menu bar, click **Downloaded**.
 - Downloaded files are displayed.
 - A downloaded icon  is displayed next to each record.



Downloaded		ID	Name
Open		271836	Shaina Beck
Open		272155	Tamera Ayers
Open		273324	Margaret Walker
Open		289931	Nathan Urban

Note: You will see the downloaded icon next to any record as you are navigating throughout Mobile Assessments (for example, Search and History).

View Consumer Assessments

1. **Sign in** to Mobile Assessments while connected to the internet.
2. Select **Search** from the top menu bar.
3. Search for the consumer records by entering the case number, last name of the consumer, date of birth (DOB), social security number (SSN) or Medicaid ID. Consumer records that

match your search criteria are shown in the results.

The screenshot shows a mobile application interface with a blue header bar containing navigation icons and the text 'Go offline' and 'ADMIN System Admin 1.6.0'. Below the header is a search bar with the text 'apple' and a search icon. Below the search bar is a table with the following columns: ID, Last Name, First Name, Medicaid ID, SSN, DOB, City, and Residence County. The table contains two rows of data:

	ID	Last Name	First Name	Medicaid ID	SSN	DOB	City	Residence County
Open	289907	Apple	Carmen	6543216541	XXX-XX-4321	10/23/1970	Fairfax	
Open	272112	Appleton	Jessica	00012250000	XXX-XX-4234	12/7/1991	Lauderdale	

Note: The cloud icon  indicates that the consumer assessments have been downloaded to the mobile device.

- Click the **Open** link next to a consumer record to view the assessments. The consumer assessments that are available on you mobile device are listed on the screen.

The screenshot shows a mobile application interface with a blue header bar containing navigation icons and the text 'Go offline' and 'ADMIN System Admin 1.6.0'. Below the header is a purple button labeled 'Make Available Offline'. Below the button is the title 'Consumer #289907 - Apple, Carmen'. Below the title is a table with the following columns: New, Review Date, Form, Rater, Last Updated, and Status. The table contains three rows of data:

New	Review Date	Form	Rater	Last Updated	Status
Open	7/11/2018	ADLs and IADLs Assessment	Adkison, Alecha	11/09/2018 10:43 am	Complete
Open	1/26/2010	Criticality Summary	Sims, Susanne	01/26/2010 10:01 am	Complete
Open	1/26/2010	Eligibility Assessment	Sims, Susanne	01/26/2010 10:01 am	Complete

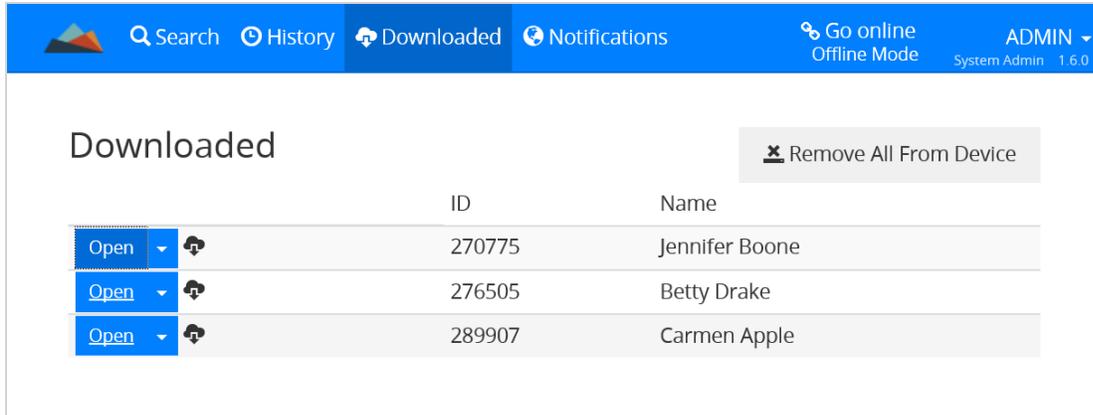
- Click the **Open** link to open an assessment.

Viewing Consumer Records

You can open consumer records to view or add assessments. You will see downloaded records on the download list or you can search for records.

To view a downloaded consumer record

- Click the **Downloaded** tab.
- Click **Open** next to the consumer record.



The screenshot shows the Mobile Assessments toolbar with the following elements:

- Search icon and text
- History icon and text
- Downloaded icon and text
- Notifications icon and text
- Go online / Offline Mode toggle
- ADMIN dropdown menu (System Admin 1.6.0)

The 'Downloaded' section displays a table with the following data:

	ID	Name
Open [dropdown] [lock icon]	270775	Jennifer Boone
Open [dropdown] [lock icon]	276505	Betty Drake
Open [dropdown] [lock icon]	289907	Carmen Apple

A 'Remove All From Device' button is located in the top right corner of the 'Downloaded' section.

Search for a Consumer Record

1. On the Mobile Assessments toolbar, select **Search**.
2. Begin typing the last name of the consumer, date of birth (DOB), social security number (SSN) or Medicaid ID and press **Enter**.
3. Find the consumer record in the list and click **Open**.

Working with Assessments

You can edit consumer assessments using either WellSky Human Services or Mobile Assessments on your mobile device. Each device has its own method of navigation. For laptops, the mouse and keyboard are used. Mobile devices, such as a smartphone or an iPad, use a standard set of device gestures, such as tap or swipe (unless connected to a Bluetooth keyboard). Use what is appropriate for your device.

The Assessment Form Window

The Assessment Form window includes a menu bar at the top, the assessment form on the left side of the screen, and navigation options on the right side of the screen.

Note: The navigation pane may not be visible when you are using a mobile device with a small screen.

Add Assessment Details

Each assessment form contains specific questions. Some questions require a single response while others allow you to select multiple answers. The table below show examples of different question types.

Question Response Types

- Single Select – Select a single response.

- Multi Select – Select multiple responses.

8.a. Is the client participating in any of the following services or programs?
 * All / None

A. Attendant services program B. Medicaid waiver C. Homemaker program

D. Home health aide E. Nursing F. Speech therapy

- Free-form Text – Type information into the field. Note that a character count is displayed as you type.

3. What is the name of the person conducting this assessment? 

Margaret Atkins

4. What is the name of the agency the assessor works for?
 Enter assessor agency

15 of 100

- Calendar – Select a date from the calendar or type it in the application.

1. What is the date of the assessment? 

1/16/2015

Note 



To complete an assessment question

- For each question, select the best response. A green checkmark is displayed to the right of the question when the question has been answered.
- Click **Save** to save the record.

Icons in the Assessment

While you are working in the Assessment window, many questions will include an icon that provides valuable information. These icons are described in the list below.

-  or **required** – The asterisk or red required text signifies required information.
- required** – The green required text signifies required information that contains an answer.
-  – The green check mark shows that question is completed.
-  – The link icon signifies questions that are linked to the Human Services consumer record.
-  – Click a calendar icon to select a date from the pop up calendar.
-  – Click a clock icon to select a time from the pop up.

-  — The green indicator icon signifies an indicator, field that automatically calculates based on data in other answers.

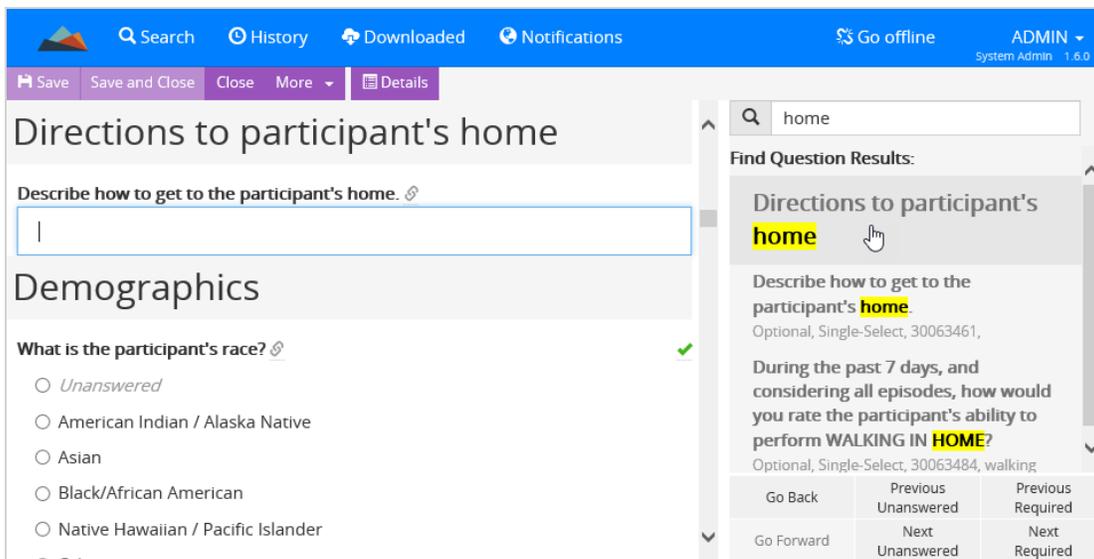
Navigating in the Assessment Window

The assessment navigation panes at the bottom right side of the screen give you options for quickly navigating to specific areas of the assessment form. You can search by keyword, jump to form topics by title, or navigate to previous and next questions using the buttons at the bottom of the screen. You can also scroll through the questions using the scroll bar to the right of the questions.

Navigate Using the Search Bar

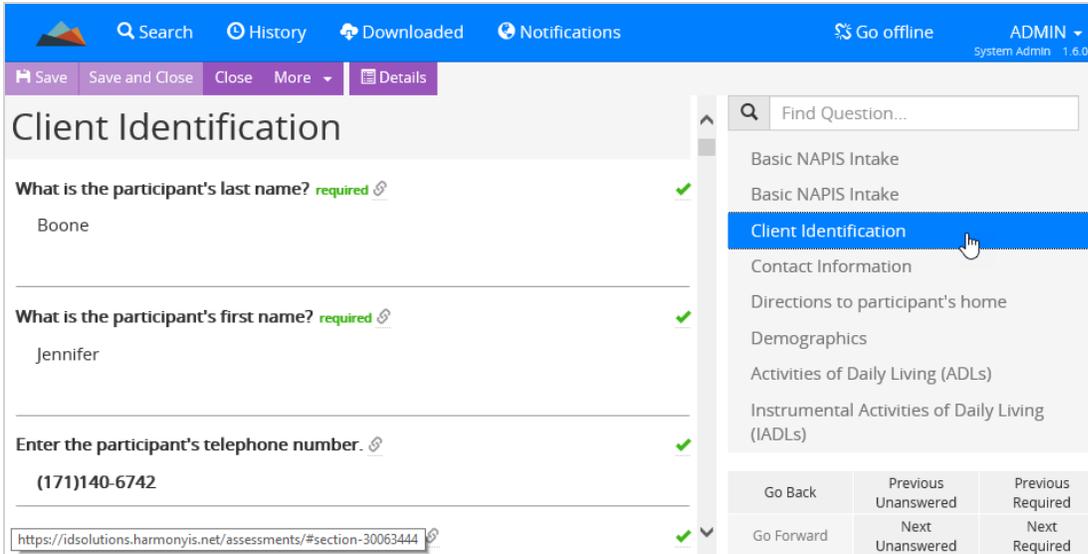
Use the search bar to search for an assessment question by keyword.

1. Type a keyword in the search bar. The search results are shown below the search bar.
2. Click a search result to navigate to the corresponding form topic.



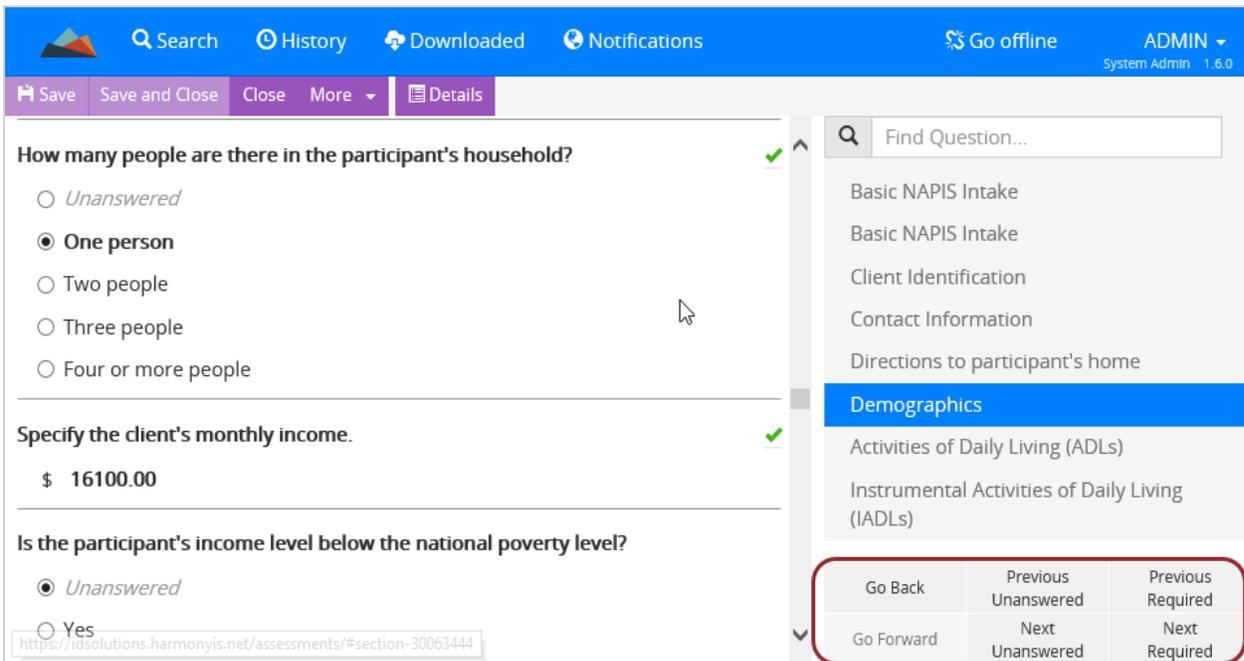
Navigate Using the Assessment Form Headers

The first navigation pane is located on the top right side of the screen. It displays the sections of the assessment form. To jump to another section, click the section header in the pane.



Navigate Using the Next and Previous Buttons

The lower right side of the assessment screen includes a menu to navigate to the next and previous questions. You can easily jump to questions that are unanswered or are required within the assessment.



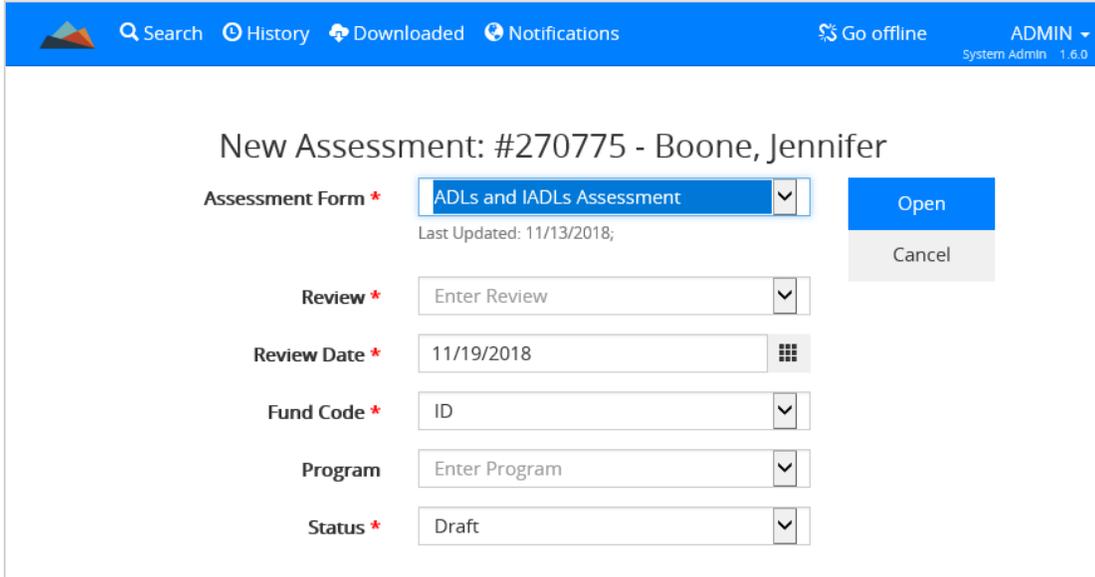
Create and Edit Assessments

When working in the Mobile Assessments application you can add new assessments for a specific consumer or edit an existing assessment.

Create a New Assessment

To create a new assessment

1. Open the consumer record.
2. Click the **New** button . The New Assessment screen is displayed.



The screenshot shows the 'New Assessment' screen for Jennifer Boone, assessment #270775. The screen has a blue header with navigation icons (Search, History, Downloaded, Notifications), a 'Go offline' button, and an 'ADMIN' dropdown menu. The main content area is white and contains the following fields:

- Assessment Form ***: A dropdown menu with 'ADLs and IADLs Assessment' selected. Below it, it says 'Last Updated: 11/13/2018;'. To the right are 'Open' and 'Cancel' buttons.
- Review ***: A text input field with 'Enter Review' and a dropdown arrow.
- Review Date ***: A date input field with '11/19/2018' and a calendar icon.
- Fund Code ***: A dropdown menu with 'ID' selected.
- Program**: A text input field with 'Enter Program' and a dropdown arrow.
- Status ***: A dropdown menu with 'Draft' selected.

3. Select the assessment form from the drop-down list.
 4. Complete all other required fields. Required fields are marked with a red asterisk.
 5. When finished, click **Open**.
- The Assessment window is displayed. Each assessment type has unique qualities, but the navigation and application options will be the same. See Working with Assessments on page 9 for information on working in the assessments window.

Edit Existing Assessments

If you're adding a new assessment, you can open it directly from the consumer record. To open an existing assessment, open the consumer record first.

To Open an Existing Assessment

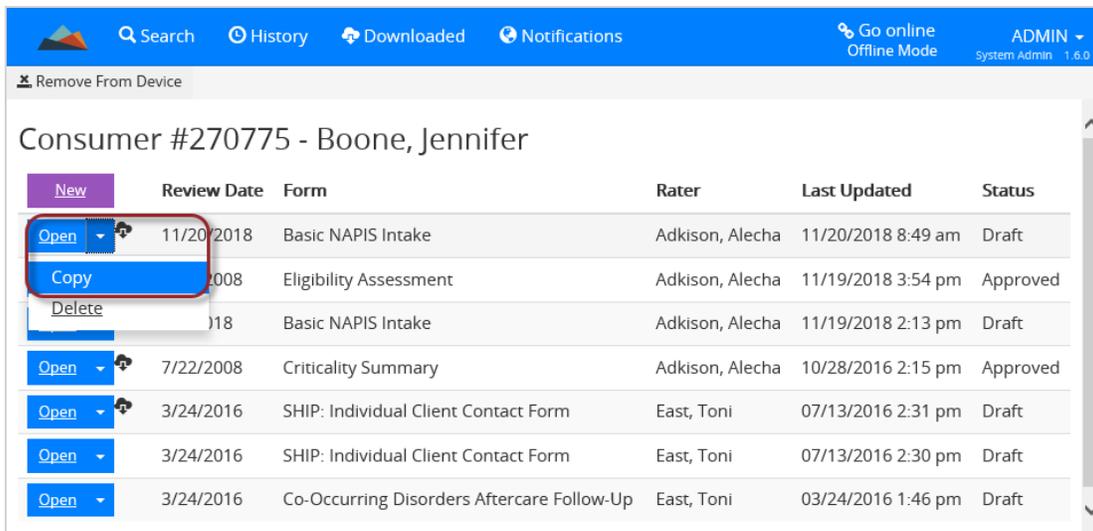
1. Within the consumer record, locate the assessment form.
 2. Click **Open**.
- You can then work with the assessment as usual. See Working with Assessments on page 9 for information on working in the assessments window.

Duplicate an Assessment

You can create a new version of an existing assessment by creating a duplicate. The duplicate is a new assessment that includes the answers from the previous assessment. Edit the form information to record changes in the consumer assessment.

To copy an assessment

1. Within the consumer record, locate the assessment form.
2. Click the drop-down arrow next to the **Open** link.
3. Select **Copy**.



	Review Date	Form	Rater	Last Updated	Status
Open ▾	11/20/2018	Basic NAPIS Intake	Adkison, Alecha	11/20/2018 8:49 am	Draft
Copy	11/19/2018	Eligibility Assessment	Adkison, Alecha	11/19/2018 3:54 pm	Approved
Delete	11/19/2018	Basic NAPIS Intake	Adkison, Alecha	11/19/2018 2:13 pm	Draft
Open ▾	7/22/2008	Criticality Summary	Adkison, Alecha	10/28/2016 2:15 pm	Approved
Open ▾	3/24/2016	SHIP: Individual Client Contact Form	East, Toni	07/13/2016 2:31 pm	Draft
Open ▾	3/24/2016	SHIP: Individual Client Contact Form	East, Toni	07/13/2016 2:30 pm	Draft
Open ▾	3/24/2016	Co-Occurring Disorders Aftercare Follow-Up	East, Toni	03/24/2016 1:46 pm	Draft

- You can then work with the assessment as usual. See Working with Assessments on page 9 for information on working in the assessments window.

Saving Assessment Records

Once the Assessment questions have been answered, the assessment must be saved.

1. On the Assessment toolbar, click **Save**  to save the record and keep it open, or **Save and Close**  to save the record and close it.
2. A save confirmation will display.

- If you are working offline a “Saved to Device Storage” message will display.

#10002 - Test, Apple - Risk Assessment - 4/17/2016 was saved to device storage.

- If you are connected to the internet a “Saved to the Database” message will display.

↻ #10002 - Test, Apple - Risk Assessment - 4/16/2016 was saved to the database.

3. If you make changes to the assessment and then try to close the form without saving the following “Action Required” message will display.

Action Required

"#270564 - Smith, Debbie - Basic NAPIS Intake - 7/9/2018"
has pending changes that must be saved or discarded
before continuing.

- Click **Save** to save the changes.
- Click **Revert** to save the original version of the assessment prior to your new changes.
- Click **Cancel** to return to the assessment form.

Note: Use the same mobile device and internet browser when you work with consumer assessments to ensure that all data is available.

Other Assessment Functions

Use the Assessment toolbar to save the form, view form details, revert to an earlier version of the form, and close.

View Form Details

Use the Details button to display the assessment header Information. Click again to return to the assessment form.

The screenshot shows the 'Details' screen of the WellSky Human Services mobile application. The top navigation bar includes 'Search', 'History', 'Downloaded', 'Notifications', 'Go offline', and 'ADMIN'. The 'More' menu is open, and the 'Details' option is highlighted. The form fields are as follows:

Assessment Form *	ADLs and IADLs Assessment	Last Updated: 11/13/2018;
Review *	Application	
Review Date *	7/11/2018	
Fund Code *	ID	
Program	Enter Program	
Status *	Pending	

Buttons for 'OK' and 'Cancel' are located on the right side of the form.

Revert to a Previously Saved Version

Select **Revert** from the **More** menu to revert to the previously saved version of the assessment form. This menu item becomes active after the assessment has been saved and responses have been changed.

The screenshot shows the 'More' menu of the WellSky Human Services mobile application. The 'Revert' option is highlighted. The background shows the 'ADLs and IADLs Assessment' form.

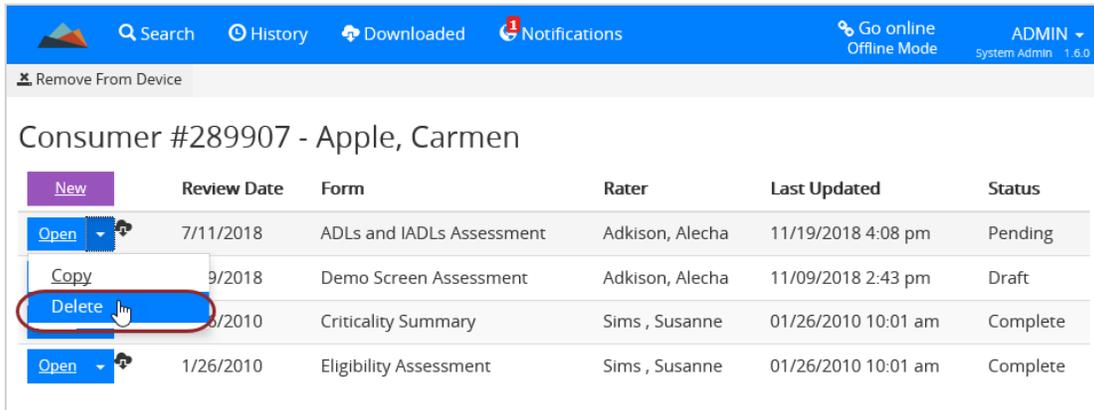
Deleting Assessment Records

Depending upon your role permissions within WellSky Human Services, you may be able to permanently delete consumer assessment records from the application using your mobile device. If you delete a record using Mobile Assessments that record is deleted from WellSky Human Services as well as from your mobile device.

To delete an assessment record

1. Open the downloaded consumer record.
2. Click the **Open** link to access the consumer's assessment.

3. Select **Delete** from the **Open** menu next to the consumer's name.



	Review Date	Form	Rater	Last Updated	Status
Open ▾	7/11/2018	ADLs and IADLs Assessment	Adkison, Alecha	11/19/2018 4:08 pm	Pending
Copy	9/2018	Demo Screen Assessment	Adkison, Alecha	11/09/2018 2:43 pm	Draft
Delete	3/2010	Criticality Summary	Sims , Susanne	01/26/2010 10:01 am	Complete
Open ▾	1/26/2010	Eligibility Assessment	Sims , Susanne	01/26/2010 10:01 am	Complete

5. A confirmation message is displayed. If you are sure you want to delete the consumer assessment from the Human Services application, click **Yes**.

Delete Basic NAPIS Intake - 7/9/2018

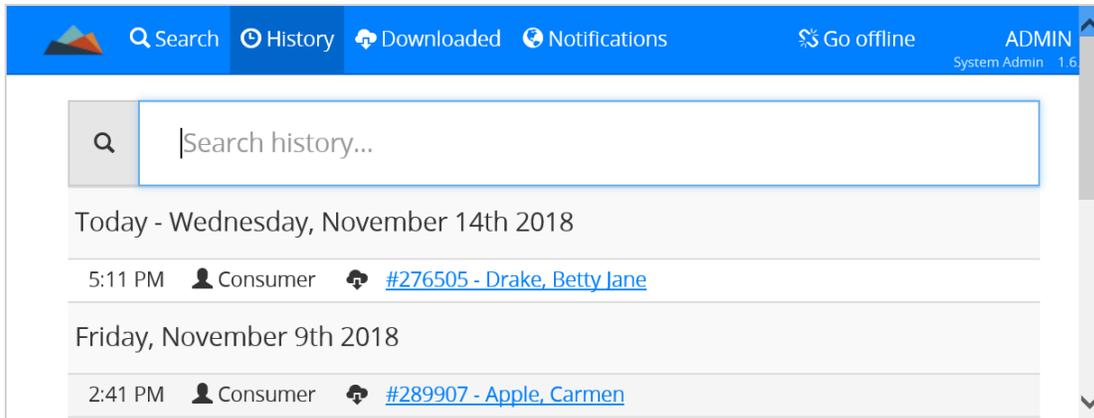
Are you sure you want to PERMANENTLY DELETE "Basic NAPIS Intake - 7/9/2018" from the database? This cannot be undone.

Viewing History

Select History from the top toolbar to see a history of all actions that have been completed on the mobile device. This allows users to quickly get back to recently opened consumers, assessments, or settings. In addition, when a large number of entries exist in the History area, use the Search field to quickly find what you are looking for.

To view the history

1. In the menu bar, click **History**.
2. A list of records is displayed, in order by date.



- To quickly find a record in a large list, use the **Search** field to find activity by keyword or consumer name.

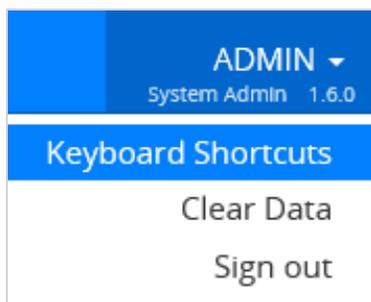
Note: Click the assessment record link to open the assessment.

Using Keyboard Shortcuts

Mobile Assessments has been designed for rapid data entry, allowing assessors to conduct comprehensive assessments, face-to-face, as quickly as possible. Assessors that like to work exclusively with a keyboard can take advantage of the embedded keyboard shortcuts to make data entry faster.

To view the keyboard shortcuts

- From the user menu in the upper right corner select **Keyboard Shortcuts**.



The list of keyboard shortcuts opens.

Application Area	Keyboard Shortcut	Action
Site-wide		

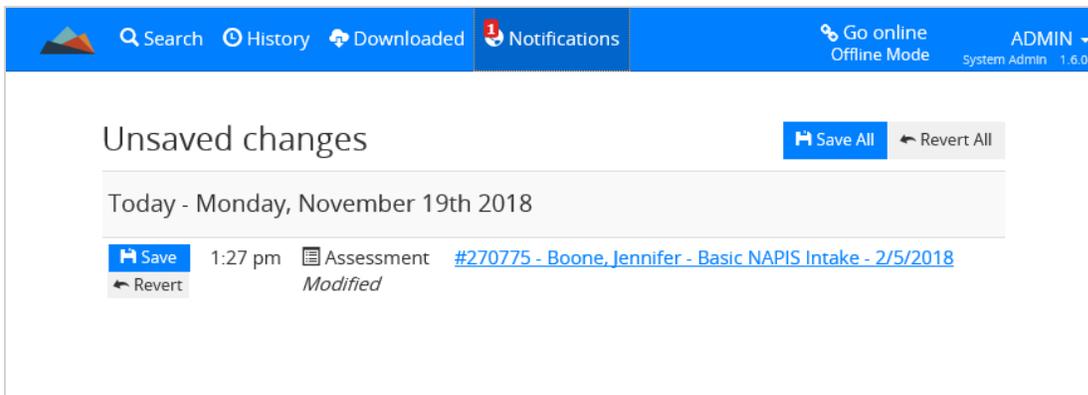
Application Area	Keyboard Shortcut	Action
	ctrl+k	Open the keyboard shortcuts page.
	ctrl+shift+b	Navigate to the previous page.
	ctrl+shift+s	Navigate to the search page.
	ctrl+shift+h	Navigate to the history page.
	ctrl+shift+d	Navigate to the downloaded consumers page.
	ctrl+shift+n	Navigate to the notifications page.
	ctrl+shift+z	Display debug information for developers.
Dialogs		
	enter	Submit the dialog.
	esc	Cancel the dialog.
Forms		
	ctrl+s	Save the record.
	ctrl+e	Close the record.
	ctrl+u	Revert all unsaved changes.
Assessments		
	ctrl+f	Focus the find question text box.
	ctrl+l	Focus the assessment section/subsection navigation list.
	tab, down	Navigate to the next question.
	shift+tab, up	Navigate to the previous question.
	ctrl+left	Navigate backwards in the question history.
	ctrl+right	Navigate forward in the question history.
	shift+down	Navigate to the next unanswered question.
	shift+up	Navigate to the previous unanswered question.
	ctrl+down	Navigate to the next required question.
	ctrl+up	Navigate to the previous required question.
	right	Navigate to the next choice (single and multi-select questions).
	left	Navigate to the previous choice (single and multi-select questions).
	ctrl+i	Edit the assessment properties.

Managing Notifications

Notifications are alerts that require attention, for example, when new assessments have been created and not yet synchronized to the server. When there is a notification, a red number is displayed on the Notifications tab.

To view notifications

1. In the menu bar, click **Notifications**.
 2. The record(s) is displayed. In the image below, a new assessment was created, but has not yet been synchronized.
- You can click **Save** to save changes to the record, or **Delete** to discard the assessment form, but to clear the notification you will have to synchronize records while in online mode.



3. Click **Go online** to synchronize changes with the server and clear this notification.

Synchronize Consumer Records

Synchronization plays an important role in ensuring that the consumer assessment records you have on your mobile device match the consumer assessment records in WellSky Human Services. When you add records to your mobile device, a copy of the record is saved to the device.

When you're in the field and do not have access to the internet, you can update consumer assessment records directly on your mobile device. The next time you connect to WellSky Human Services, the updated records from your mobile device are automatically copied to WellSky Human Services. Once this is done, both your mobile device and WellSky Human Services have the most current version of the record. The whole process can be described in three steps:

- Connect to Mobile Assessment via the internet and download the consumer records you need.
- Work with your consumers and update their records.

- Connect to WellSky Human Services to upload updated consumer assessment records.

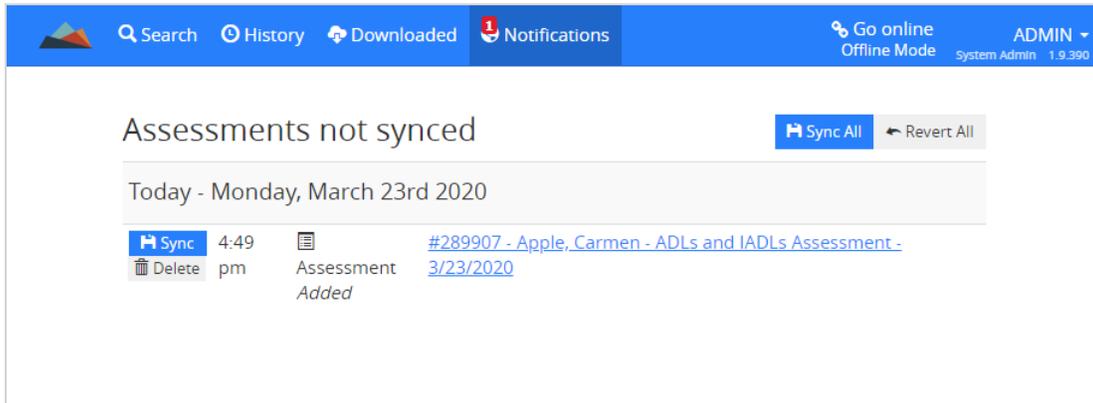
When you're ready to synchronize the data, switch to online mode. You don't need to do anything to synchronize consumer records other than connecting to WellSky Human Services. When the records have been synchronized, a message is displayed.

✔ Offline data synchronization complete.

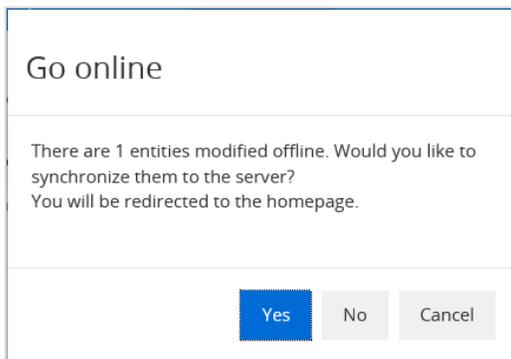
Note: As soon as you connect to WellSky Human Services, the Notifications area will prompt you to synchronize if records from your mobile device are ready to be uploaded.

To synchronize records

1. From the Mobile Assessments toolbar, open **Notifications**. If updated records exist on the mobile device that have not yet been synchronized, the Notifications tab will include a red icon that shows the number of records that are out of sync.



2. If necessary, click the **Go online** link. A confirmation message appears.



3. Click **Yes** in the confirmation message. The status bar will display message updates as consumer records are synchronized. When the synchronization is complete, the status bar

will show a confirmation message.



✓ Offline data synchronization complete.

Note: Use the same mobile device and internet browser while working with Mobile Assessments to ensure that all data is available.

Removing Consumer Records

It is important to manage the downloaded records on your mobile device. As a general rule, when you're finished working with your consumer and their assessments, and you have successfully synchronized data, remove the record from your mobile device. Removing records that you no longer need is significant for the reasons listed below.

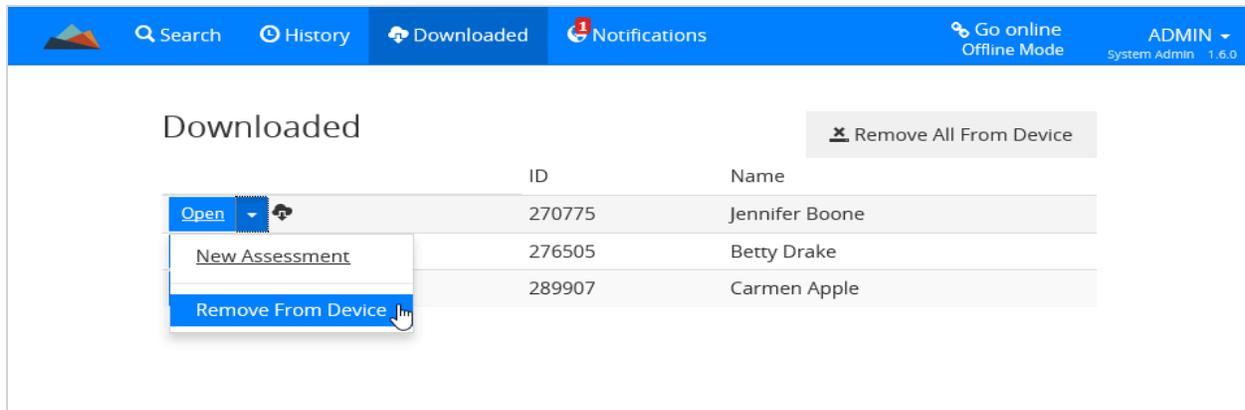
- Records contain confidential information that needs to be safeguarded.
- If you keep many records on your mobile device, it can be time-consuming to synchronize them.
- Records accumulate and can take up valuable space on your device.
- When using mobile devices, it is easier to scroll through short, rather than long lists.

To Remove One Consumer Record

You can remove one or many records from your mobile device. This does not affect the Mobile Assessments application, just the records belonging to consumers.

To remove a consumer record

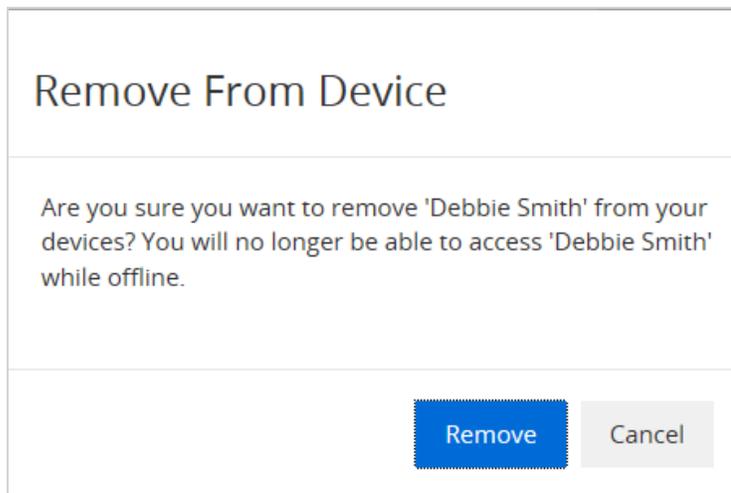
1. On the menu bar, click **Downloaded**.
2. Click the **Open** link next to the consumer's name.
3. Select **Remove From Device**.



The screenshot shows the 'Downloaded' section of the application. The top navigation bar includes 'Search', 'History', 'Downloaded', 'Notifications', 'Go online / Offline Mode', and 'ADMIN System Admin 1.6.0'. Below the navigation bar, the 'Downloaded' section is titled, and a 'Remove All From Device' button is present. A table lists three records:

	ID	Name
Open	270775	Jennifer Boone
New Assessment	276505	Betty Drake
Remove From Device	289907	Carmen Apple

4. A confirmation message is displayed. Click **Remove**.



Remove From Device

Are you sure you want to remove 'Debbie Smith' from your devices? You will no longer be able to access 'Debbie Smith' while offline.

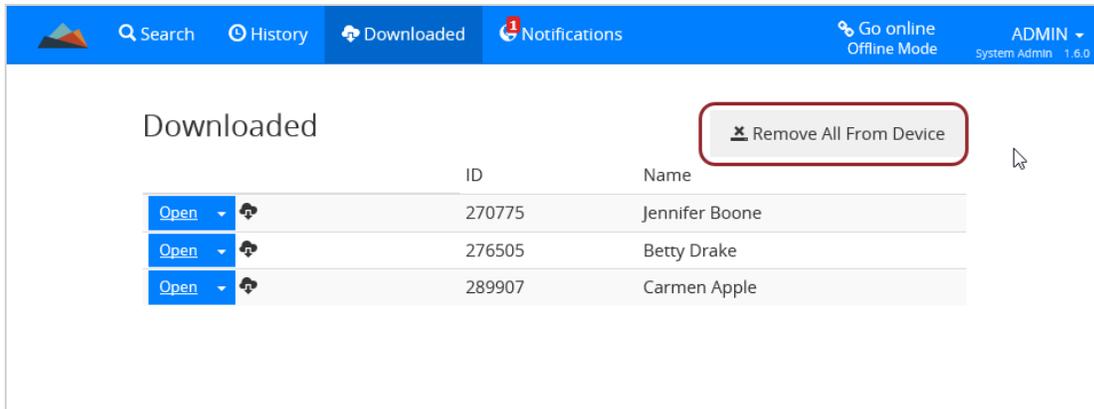
Remove **Cancel**

5. Once removed, the record will no longer display in the Downloaded list.

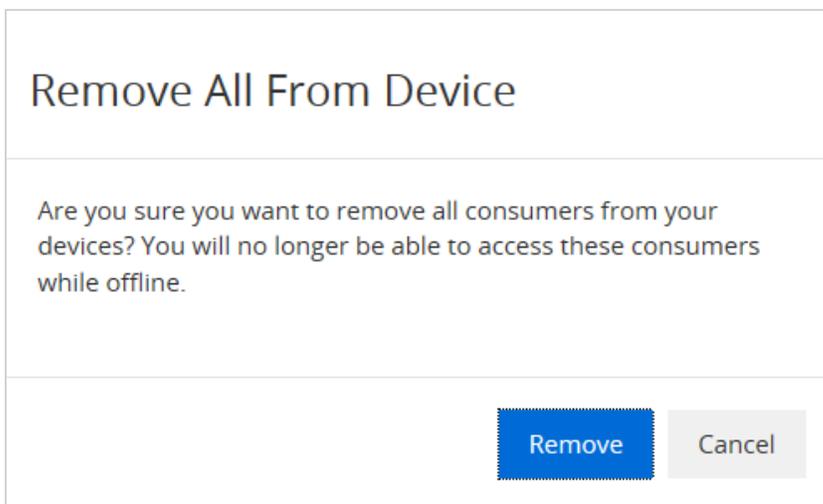
To Remove All Consumer Records

To remove all consumer records from your mobile device

1. Select Downloaded from the top menu bar.
2. Click Remove All From Device.



3. A confirmation message is displayed. Click **Remove**.



4. A message is displayed: Offline Data Synchronization complete.

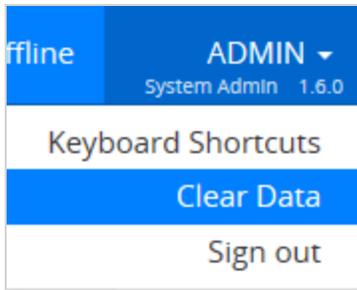


Note: Remember, you are not deleting consumer records from WellSky Human Services; you are only removing them from your mobile device. Best practices recommend that you check with your system administrator for record management guidelines.

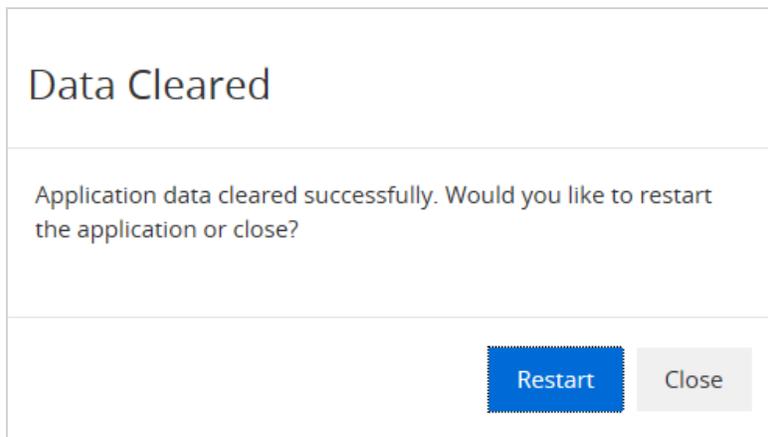
To Remove All Data and Records

If you are planning to replace your mobile device, you must remove all consumer records and the Mobile Assessments application data. The Clear Data feature will remove all consumer records and history from your account.

1. Click the drop-down menu next to your user name in the upper right corner of the Mobile Assessments application.
2. Select **Clear Data**.



3. A confirmation message will display asking if you are sure you want to remove all Mobile Assessment Data stored on this device, click **Yes**.
 4. Another confirmation message will display once the data has been cleared asking if you want to Restart or Close Mobile Assessment.
- Click **Restart** to restart the application and log back in.
 - Click **Close** to close the application and browser.



Configuring Mobile Assessments

The Mobile Assessments utility, available in the WellSky Human Services External Web Form Configuration utility, allows system administrators to configure Mobile Assessments for users.

The Mobile Assessments Utility

The Mobile Assessments utility works with WellSky Human Services. You'll use the External Web Form Configuration utility to access configuration points for Mobile Assessments.

You may need to expose the Mobile Assessments utility within the External Web Form Configuration utility before you use it for the first time. You will use the Group Setup utility to expose this page.

To expose the Mobile Assessments utility

1. From the **Utilities** chapter, select **Group Setup**.
2. From the **Select Group** drop-down list, select the group for which you are exposing this page.
3. From the **Chapters** tab, select the **Utilities** chapter.
4. From the **Pages** tab, select **Utility Main**.
5. From the **Sub-Pages** tab, navigate to the **Utility External Web Form Configuration** page. If necessary, clear the check mark from the Remove column to expose this page.
6. Select the **Utility External Web Form Configuration** page. From the Sub-Pages tab, navigate to the **Utility Mobile Assessments** page. Clear the check mark from the Remove column to expose this page.
7. From the **File** menu, select **Save and Close Group Setup**.

Configuring Mobile Assessments for downloaded forms

Offline mode in Mobile Assessments allows the user to retain access to recently used consumer forms. System Administrators can configure the types of forms that will be available for download, and how many forms will be available for offline use.

The Mobile Assessments utility allows you to configure two options, as follows:

- Type of forms to download in offline mode – select between the following two values:
 - Most recent, forms can repeat
 - Most recent, no repeated forms
- Number of forms to download in offline mode – select the number of forms that users will be able to download for use while offline.

To configure Mobile Assessments for offline forms

1. From the **Utilities** chapter, select the **External Web Form Configuration** utility.
2. From the **External Web Form Configuration** page, select **Mobile Assessments**. The Mobile Assessments page opens.

3. From the **Type of Forms to Download in Offline Mode** field, select one of the following options:
 - Most recent, forms can repeat
 - Most recent, no repeated forms
4. From the **Number of Forms to Download in Offline Mode** field, type the number of forms that will be available to users while they are not connected to the internet.

Note: WellSky Human Services does not limit the maximum number of forms that can be made available but it may be practical to set a limit to optimize device performance and storage capacity. For example, a system administrator may choose to select 15-20 forms as the maximum allowable number.

5. From the **File** menu, select **Save and Close Mobile Assessments**. The External Web Form Configuration page returns to view. Select **Close External Web Form Configuration** from the **File** menu.