

# Client Discharge Workflow Validation

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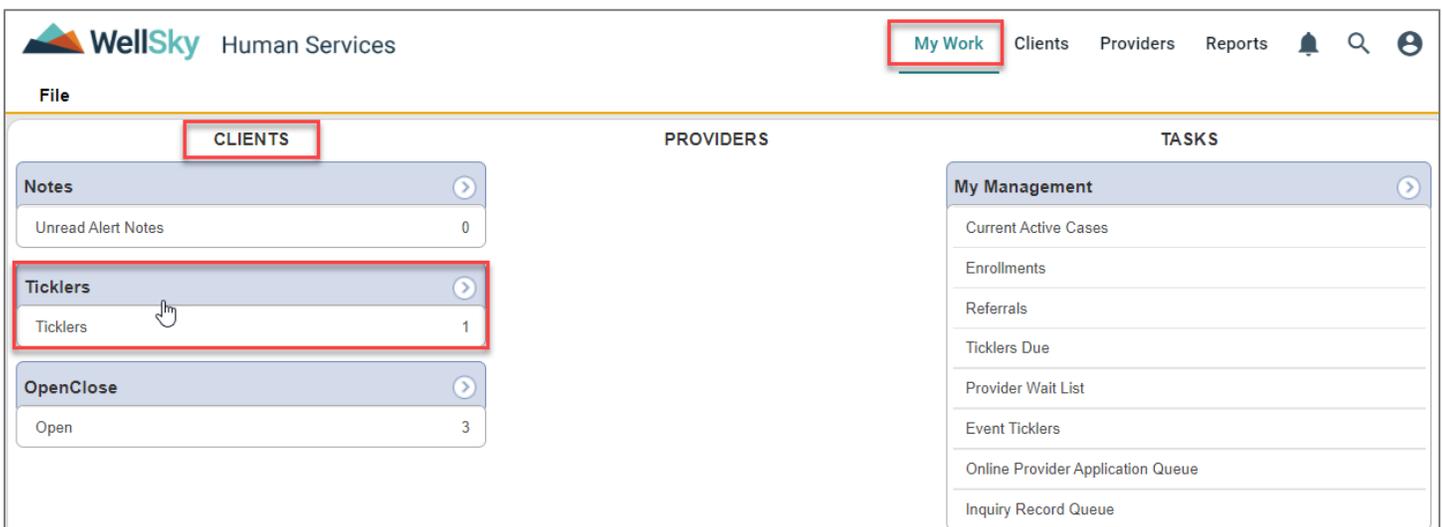
## Access the Client record

There are many ways to access the client record to begin the discharge process. Use only one of these options to locate the client record. Then proceed to the next section, [Add Client Discharge Summary form for TEDS](#).

First, be sure you are using the Provider Role. If you are unsure how to do this, please refer to the “Set Role” section of the Client Admission Workflow Validation document.

Option 1: Use Ticklers to find Clients that need to be discharged

1. The Provider user will be reminded to discharge this client via a message tickler 60 days after the **1. TEDS / SABG Data Collection** Assessment/form was saved with a status of “Complete”.
  - a. In the **My Work** chapter, under the **Clients** column click **Ticklers**.



Caption: screen shot showing the My Work chapter with the Clients column and Ticklers panel selected

**Tip**  
*The tickler will appear on the date it is due BUT if the due day hasn't arrived yet and you need to see it for testing, you must uncheck the "Apply Alert Days Before Due" box and click Search.*

b. Hover over the **black arrow** to the right of the row and click **View Client's Record**.

**File**

Filters

Status Equal To New AND ✕

CaseNo +

Apply Alert Days Before Due

Search Reset

2 Ticklers record(s) returned - now viewing 1 through 2

CaseNo	Client Name	Tickler Name	Date Created	Date Due	Date Completed	Status	
10003	Potter, Harry	Does this client need to be discharged?	12/07/2022	02/05/2023			▶
10003	Potter, Harry	Complete Client Discharge Summary form	12/07/2022	12/07/2022			▶

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Cancel

Reassign

Complete

View Clients Record

Caption: screen shot showing the tickler list with the Apply Alert Days Before Due and the View Clients Record selected

c. You are now on the client record.

Human Services
My Work Clients Providers Reports 🔔 🔍 ⌵

File Edit Reports Ticklers

Smith, Anne (10011)

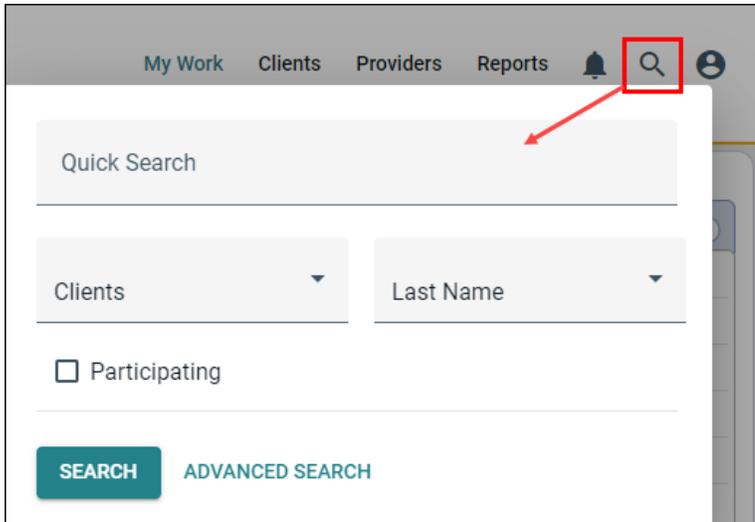
Demographics
Open/Close
Location/Episode
Assessments/Forms
Medications
Notes

Demographics	
Last Name	Smith
First Name	Anne
Middle Initial	
Also known as	
Referral Source	Employer/Employee Assistance Program (EAP)
Date of Birth	6/1/2000
Age	22.9
Gender	Female
Gender Identity	Female or Woman
Race	Asian
Hispanic Origin	Not of Hispanic or Latino Origin
Marital Status	Never married
Veteran	Not collected
Living Arrangement	Dependent Living - clients living in a supervised setting
Number of People in Household	3
Below 200% Poverty Level	N/A
Primary Language	English
SSN	XXX-XX-5555
Medicaid ID	123
Contact Information	
Address Type	
County	

Caption: Screen shot of a client's record

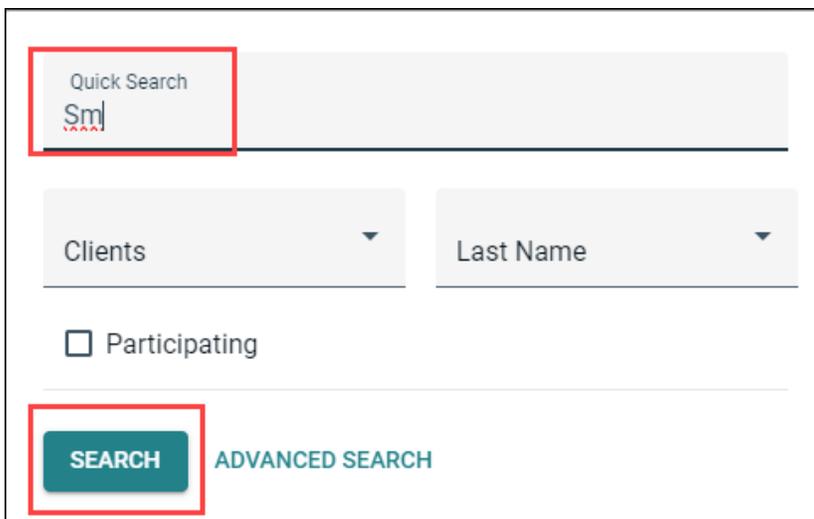
## Option 2: Quick Search

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

WellSky Human Services My Work Clients Providers Utilities Reports

**File**

2 Clients Quick Search Result record(s) returned - now viewing 1 through 2

	Case No	Last Name	First Name	Also known as	SSN	Medicaid ID	DOB	Status
<input type="checkbox"/>	10011	Smith	Anne				06/01/2000	Active
<input type="checkbox"/>	10013	Smurf	Jo		XXX-XX-3333	00123456789	02/15/1970	Active

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Caption: Screen shot of Quick Search results

d. You are now on the client record.

WellSky Human Services My Work Clients Providers Reports

**File Edit Reports Ticklers**

Smith, Anne (10011)

Demographics OpenClose Location Episode Assessments/Forms Medications Notes

**Demographics**

Last Name	Smith	Hispanic Origin	Not of Hispanic or Latino Origin
First Name	Anne	Marital Status	Never married
Middle Initial		Veteran	Not collected
Also known as		Living Arrangement	Dependent Living - clients living in a supervised setting
Referral Source	Employer/Employee Assistance Program (EAP)	Number of People in Household	3
Date of Birth	6/1/2000	Below 200% Poverty Level	N/A
Age	22.9	Primary Language	English
Gender	Female	SSN	XXX-XX-5555
Gender Identity	Female or Woman	Medicaid ID	123
Race	Asian		

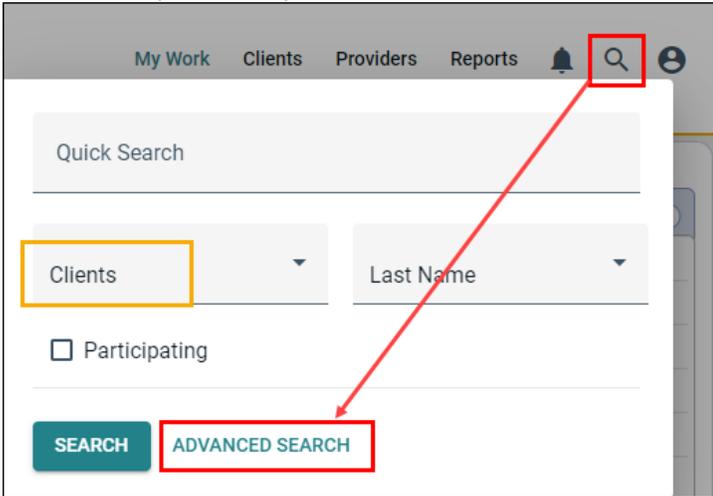
**Contact Information**

Address Type	County
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Caption: Screen shot of a client's record

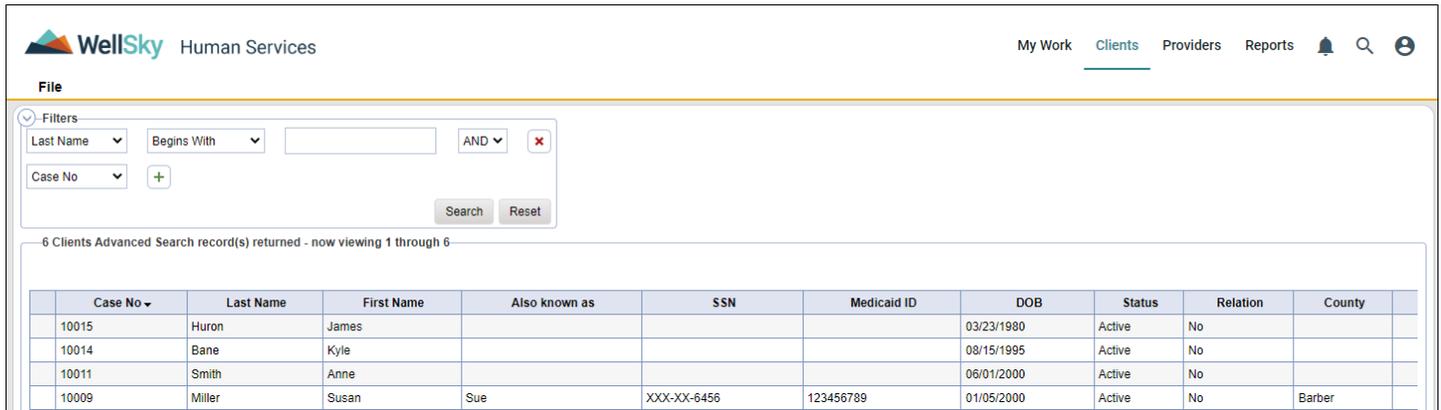
Option 3: Advanced Search

3. Access the client record through advanced search.
  - 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**.



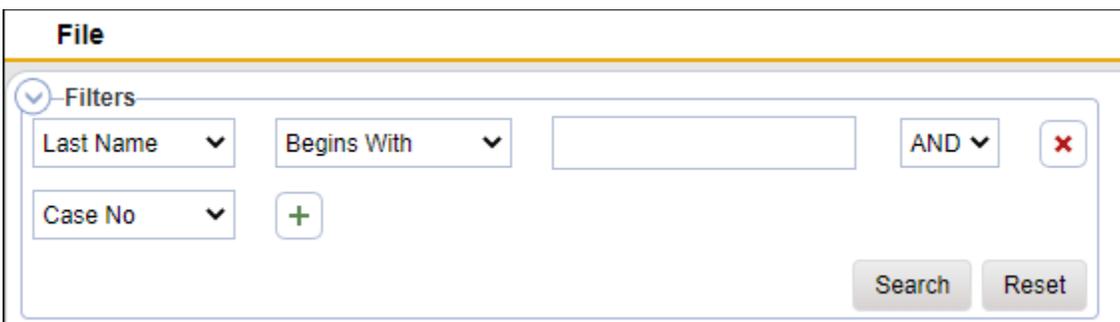
Caption: Screen shot of the search window when first opened

- 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.
- f. You are now on the client record.

Caption: Screen shot of a client's record

#### Option 4: My Work

- 4. Access the client record from the My Work dashboard.
  - a. Click on My Work
  - b. Under Clients, click on "Admitted/Open" under Enrollments.

Caption: Screen shot of My Work, with Clients and Admitted/Open enrollments indicated

- c. You will see a list of all your clients with this status.
- d. Once the correct record is found, **click anywhere within the row** to go to the client record.

WellSky Human Services Welcome, Dawn Tarzwell **Enrollments**  
2/24/2023 3:11 PM

**File**

Filters  
 Disposition Equal To Admitted/Open AND  
 Disposition +  
 Search Reset

3 My Work Enrollments record(s) returned - now viewing 1 through 3

Client	Case No	Provider	Provider Number	Disposition	Disposition Date	Enroll Date	Discharge Date	Primary Worker	LOS
Huron, James	10015	Sample Provider 1		Admitted/Open	2/16/2023 12:00:00 AM	02/16/2023		Tarzwell, Dawn	8
Miller, Susan	10009	Helping Hands Inc		Admitted/Open	2/7/2023 12:00:00 AM	02/07/2023		Tarzwell, Dawn	17
Miller, Susan	10009	Sample Provider 1		Admitted/Open	2/9/2023 12:00:00 AM	02/09/2023		Tarzwell, Dawn	15

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Caption: Screen shot of the list of clients in the selected disposition

e. You are now on the client record.

WellSky Human Services My Work Clients Providers Reports

**File Ticklers**

Leaf, Green (10030)

Demographics OpenClose **Location Episode** Assessments/Forms Medications Notes

Filters  
 Disposition Not Equal To AND  
 Provider Location +  
 Search Reset

1 Clients Location Episode record(s) returned - now viewing 1 through 1

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

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Caption: Screen shot of a client's record

## Add Client Discharge Summary form for TEDS

Now that you have accessed the correct client record we can begin the discharge process.

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

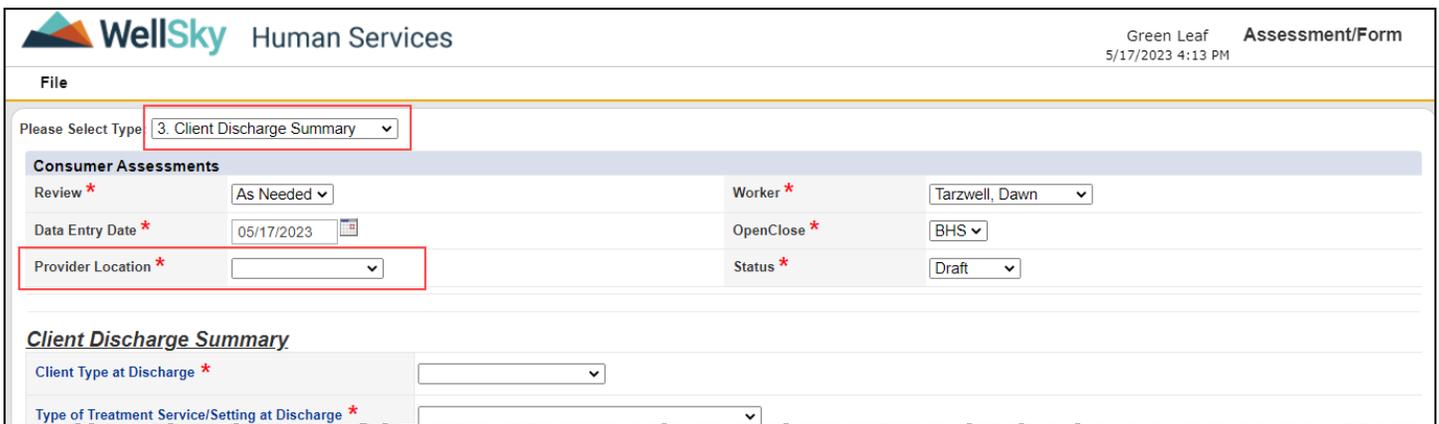


Caption: Screen shot of client's tabs

2. On the **File** menu, click **Add Assessment/Form**
  - a. In the **Please Select Type:** dropdown, select **3. Client Discharge Summary**.
  - b. Fill out the header section.
    - i. Select the correct provider location from the dropdown.

	<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>
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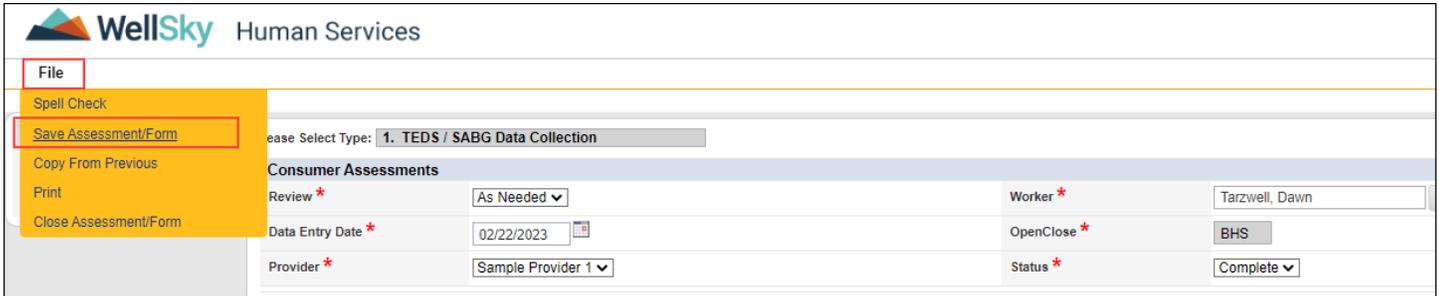
- ii. Worker defaults to current worker (person collecting the data). *(If this needs to change, click the ellipse (...) next to the field and search for the last name of the new worker)*
- iii. Leave Review and Data entry date as the default values.
- iv. Leave Status in Draft until data entry is finished.



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

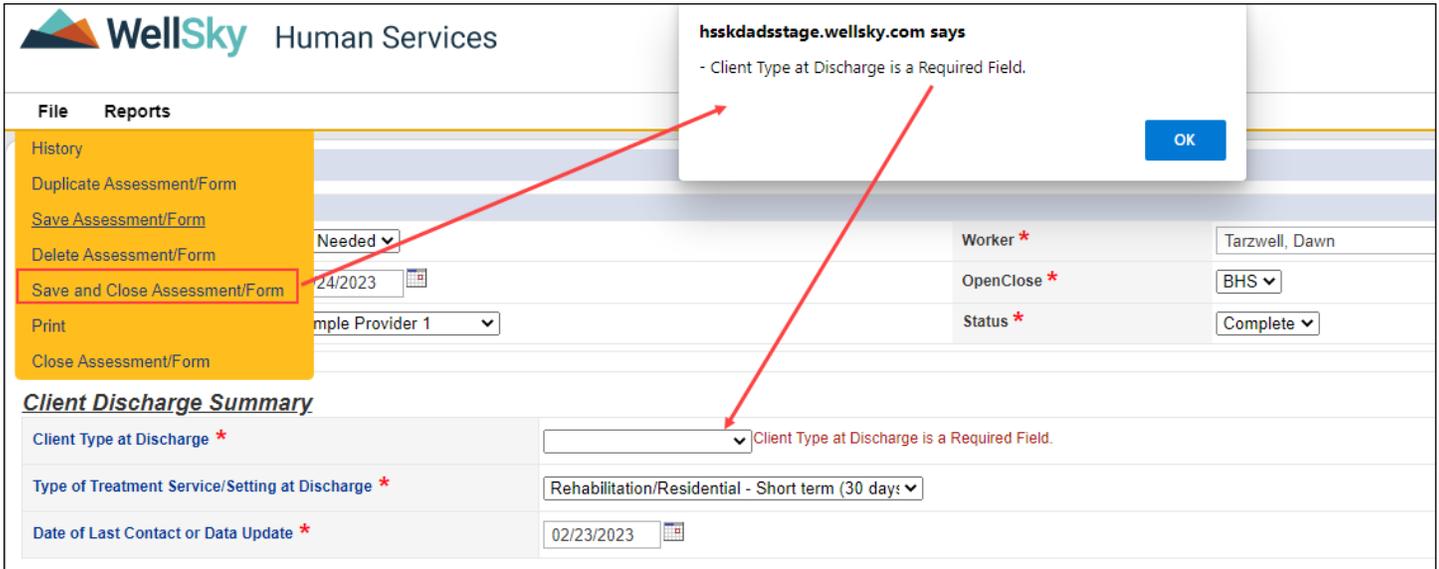
3. Fill out the rest of the form. Remember that a red asterisk after the question means an answer is required. All questions should be answered based on status at discharge. TEDS questions reported with the discharge data which are based on status at admission (e.g., DIS 13 through DIS 16) will automatically be pulled from the form "1. TEDS / SABG Data Collection" and do not need to be supplied here.
  - 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. When finished entering all of the data, go back to the top of the screen and change the **Status** to **Complete**.

- c. 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?”
- d. On the **File** menu, click **Save and Close Assessment/Form**.



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

- e. If you missed any required fields, they will be marked with a message in red like below. Correct these then attempt to save again.



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

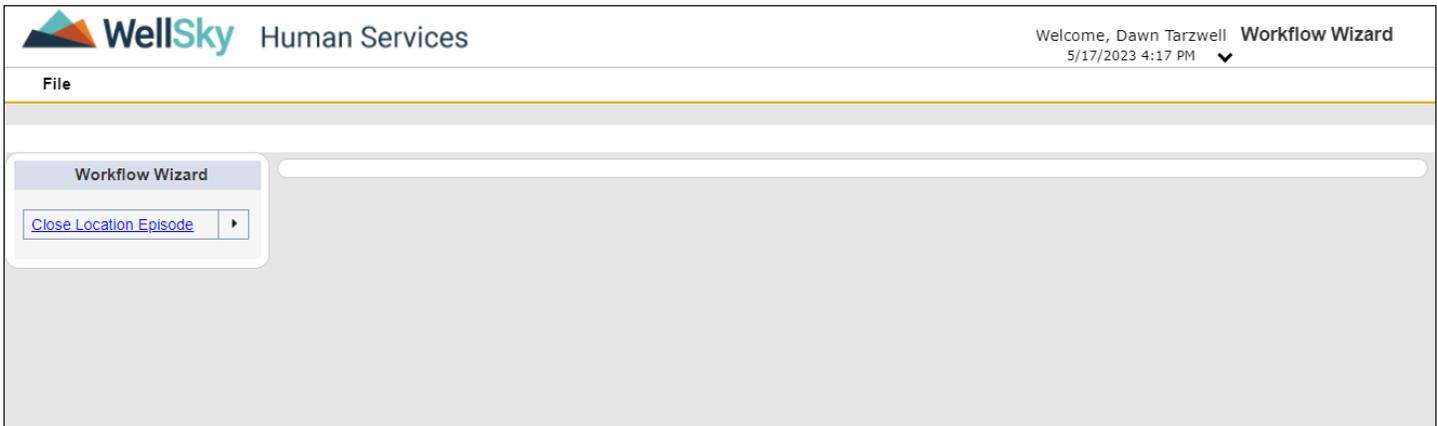
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*A workflow wizard will appear to take you through the final step to close/discharge the client.*

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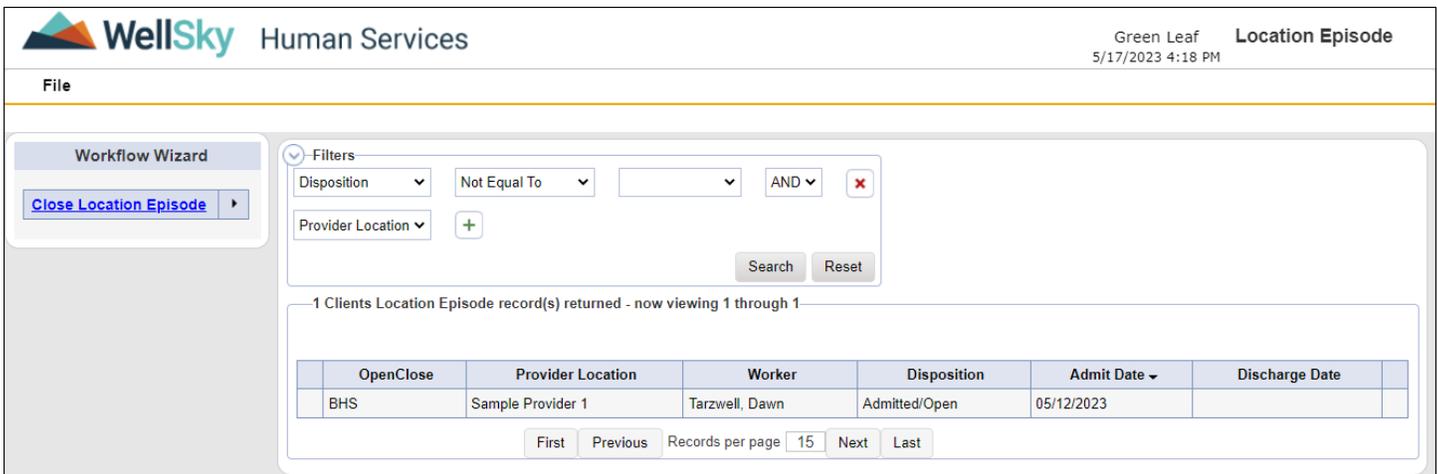
## Close/Discharge an Episode

1. A Workflow wizard screen will appear.



Caption: Screen shot of Workflow Wizard with 1 task

2. Click the task, **Close Location Episode**.
  - a. A list view showing all episodes for the client will appear.



Caption: Screen shot of Workflow Wizard with list view of Episodes showing

- b. Locate the current episode (there may be past episodes listed along with the current one). Click anywhere on that row to edit the Episode.

- i. Change the Disposition to “Discharged/Closed”.
- ii. The Discharge Date defaults to today, edit it as needed.
- iii. Answer any other needed questions.

WellSky Human Services Green Leaf Location Episode  
Last Updated by dtarzwel  
at 5/17/2023 3:54:33 PM

**File**

Location Episode

Workers

OpenClose \* BHS

Provider Location \* Sample Provider 1 [Details](#)

Enrollment Type \* Inpatient

**Disposition \*** Discharged/Closed

Disposition Date 05/17/2023

Wait List Date

Admit Date \* 05/12/2023

Expected Discharge Date

Comments

**Discharge Date \*** 05/18/2023

Caption: Screen shot of Episode record showing Disposition and Discharge Date fields

- c. From the **File** menu, select **Save and Close Location Episode**.

**File**

- History
- Spell Check
- Save Location Episode
- Delete Location Episode
- Save and Close Location Episode**
- Print
- Close Location Episode

Caption: Screen shot of File menu

- d. You will be returned to the Workflow Wizard screen with the list view showing all Location Episodes for the client. Note that the status is now showing as “Discharged/Closed”.

WellSky Human Services Green Leaf Location Episode  
5/18/2023 8:43 AM

**File**

Workflow Wizard

[Close Location Episode](#)

Filters

Disposition Not Equal To AND

Provider Location +

Search Reset

1 Clients Location Episode record(s) returned - now viewing 1 through 1

OpenClose	Provider Location	Worker	Disposition	Admit Date	Discharge Date
BHS	Sample Provider 1	Tarzwel, Dawn	Discharged/Closed	05/12/2023	05/18/2023

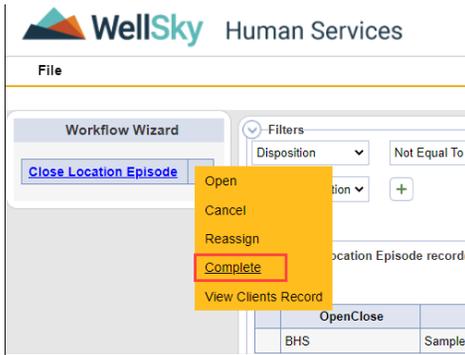
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Caption: Screen shot of Workflow Wizard with list view of Location Episodes showing

- e. Move your mouse pointer over the black triangle  to the right of the task “Complete Episode”. From the fly out menu, click **Complete**.

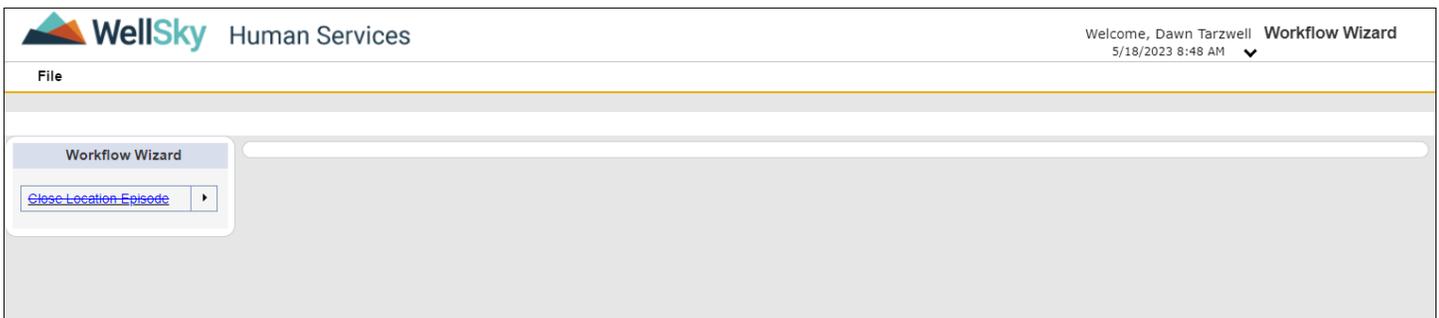


Caption: Screen shots of flyout menu



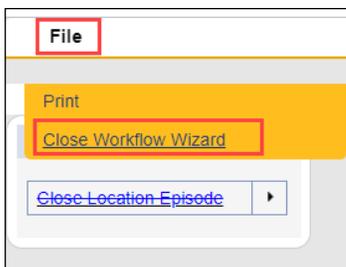
Caption: Screen shot of flyout menu once expanded

- f. The task will now be crossed out, indicating it is complete.



Caption: Screen shot of Workflow Wizard screen with the task crossed out

- g. On the **File** menu, click **Close Workflow Wizard**.



Caption: Screen shot of File menu

Client discharge is now complete.