WellSky Human Services – Navigation

Login/Password

1. To receive access to the WellSky Human Services system, you must complete the WellSky registration packet provided by KDADS. If you need assistance obtaining/completing the registration packet, talk to your supervisor or your organization's WellSky liaison if you know who that is.
2. WellSky Human Services login page: https://hssksdadsprod.wellsky.com/humanservices
3. You will be emailed your user name after your registration packet has been vetted and your account set up.
4. You will receive your temporary password for your first time login from your organization's WellSky liaison.
5. Your temporary password will expire and prompt you to change it.
6. Password requirements:
   - Password cannot be the same as the username
   - Password length must be 12 characters or more
   - Password cannot be reused
   - Password must contain characters from all of these categories:
     - uppercase characters (A through Z)
     - lowercase characters (a through z)
     - numbers (0 through 9)
     - special characters (! & # $ % etc.)
   - Passwords expire after 90 days
   - Account will be locked after 5 unsuccessful login attempts
     Tip: Use the Forgot Password option before the 5th login attempt.

   Complexity requirements are enforced when passwords are changed or created.

7. If you have any issues receiving your username or password, or logging in to WellSky Human Services, email the HS EBIT Technical Help Desk at ebitsm@ks.gov or call them at 785.296.4999 (toll-free 833.765.2001). A ticket will be created for you and a Help Desk technician will respond via email or phone. While you can report an issue this way 24/7, the Help Desk technician will return your call between 7 AM and 5 PM Monday through Friday. Help Desk Technicians are not available on State holidays.
8. The **Change Password** link will ask for your username and current/old password, and your new password/confirm new password.
9. After it is changed you will return to the WellSky Human Services login page where you will login with your new password.
10. You will get an email from noreply@wellsky.com notifying you of your password change.
11. The **Forgot Password?** link asks for your username and email address. It uses two factor authentication to confirm your identity:
    a. noreply@wellsky.com emails you a verification code, which you will enter in the WellSky app.
    b. Asks you one of the security questions from your "My Profile" settings (covered in next section).
    c. Prompts you to enter/re-enter a new password.
    d. Once the password is successfully changed you will be returned to the default WellSky Human Services login page, where you will login with your new password.
    e. You will get an email from noreply@wellsky.com notifying you of your password change.

TIP: Security best practice is to not use the save/autofill data in your browser. This goes for your username/password and for fields within the application – names, addresses, etc. Autofill within WellSky forms can cause unexpected/unintended results.

User Info/Profile

You should update your User Profile immediately after your initial login to WellSky Human Services. You will set up your security Questions here.

1. Click on the profile icon ( ) and select "My Profile"
2. Choose three different Security Questions and enter responses. You can only see the responses when you are first creating them – click on the eye icon ( ) to unmask your responses. Future access to review/edit your Security Questions/Responses will always show the responses masked.
3. File > Save and Close My Profile to save your Security Questions and Responses.
4. Click outside of the Profile pop-up to close it.

TIP: If you have a password keeper application, this would be a good place to record your Security responses in case you forget them.

Navigation

Terminology/navigating home page

1. Chapters (My Work, Clients, Providers, Reports)
   - My Work – default or "home" page – shortcuts to get to various pages in the application. As you get more familiar with navigating through the application, you will learn which shortcuts work best for where you want to end up.
   - Clients – first access after logging in you will get your client list. Once a client record has been opened, the Clients chapter will take you back to Demographics page of the most recent client you accessed.

     TIP: Use Search ( ) > Advanced Search to access your client list at any time.

   - Providers – you will see the Provider Locations you are associated with.
   - Reports – access reports that can be viewed in multiple formats (HTML, PDF, Excel, TIFF, CSV).
2. Notification bell icon ( ) – Notifications from WellSky or KDADS are accessed here.
3. Search ( ) – search for specific client or provider
   - Quick Search – search by single field only: Client ID, Last Name, SSN, Medicaid ID, or DOB
   - Advanced Search – allows searches using filters for multiple fields of your choice
4. Profile ( )
   - See who is logged in with date/time
   - My Profile – add/update Security Q&A
   - Sign Out of WellSky Human Services application

Menu Bar [context-sensitive]

Menu bar choices are determined by what app window/page you are in – for example, Demographics displays different menu options than Location Episodes. Most common options are File and Edit.

My Work chapter

1. **Clients** pane – this pane contains shortcuts to different pages of client records. Most shortcuts are filtered as indicated – for example, you can choose to see a list of your Admitted/Open Location Episodes or your Discharged/Closed ones.
2. **Providers** pane – Currently this pane is empty.
3. **Tasks** pane – The "My Management" shortcuts provide additional links to get to other areas of the application. There are similar shortcuts here and in the Clients pane, but they differ in that they are filtered differently so may display different data. For example, choosing "Location Episodes" from the Tasks pane brings up all episodes for all providers you are associated with – regardless of episode status or the associated assessor (Primary/Secondary Worker). But you are limited to seeing just the Location Episode page for the selected client.

Choosing one of the Location Episode shortcuts in the **Clients** pane will take you to the selected client's full data set – Open/Close, Location Episodes, Assessments/Forms, etc.

Saving/Closing

WellSky Human Services opens new windows when a new client page is accessed. It is easy to get lost amongst multiple open pages if you do not close them when you are done with them. These are suggested best practices for closing pages in WellSky Human Services.

1. Use File > Close and Save to ensure you have saved your changes on the pages you are closing.
   - If you make changes on the page and use File > Close and Save, changes are saved automatically and the page is closed.
   - If you make changes on the page and use File > Close, you will be warned that there are unsaved changes and you can still save them.
   - If you make changes on the page and use the browser window's "X" in the upper right corner of the window, *you will not be prompted to save and the window will close without saving anything*.
2. To close the window you are in, get in the habit of using the menu File > Close and Save [tab name] to close the window. Or File > Close if you want to be sure NOT to save any changes that might have been made.
3. If you get a message that pops up when you close a window, make sure you read the message to be sure you are responding in the correct manner.

NOTE: If you are in a window that you know you did not update, or you know you do not want to save anything you might have inadvertently changed, you can use the X to close the window. The most important thing is to be aware of the differences of File > Close and "window X" close.

Spell Check

There is a spell check feature that can be used on pages with text boxes. If it is available on the page you have open, it can be found under File > Spell Check.

Workflow Wizards and Ticklers

1. Workflow Wizards are triggered automatically based on certain functions that are completed. For example, after creating a new Location/Treatment Episode, a wizard will start for creating a new TEDS/SABG assessment form, because a Location Episode must have a TEDS/SABG assessment.
2. When a wizard displays, the name of the wizard is on the left side of the window with a (⏵) at the end of the wizard name – click on the arrow to open the "fly-out" menu to choose what your action will be for that wizard. If you just want to run the wizard (open it) you can just click on the Wizard name itself and skip the fly-out menu.
3. Ticklers are reminders to complete tasks – they may be future tasks like discharging an open episode, or current tasks like completing a required form you left in Draft status.

   TIP: If you cancel a wizard, a reminder to finish that item may not show up as a Tickler. For example, canceling a wizard to complete a TEDS/SABG assessment form for a new Location Episode will not show up as a Tickler. If you get a wizard that you are not ready to complete yet, just close the wizard (File > Close) instead of canceling it.

Clients/Search/Filter

1. If you have not accessed any client detail yet, clicking on the **Clients** chapter will take you to a list of all clients you have access to (i.e., associated with the Provider Locations you are associated with).
2. Default sort is by last name, ascending.
3. Bottom of list – shows Records per page (15 by default). You can change the number of records that display by entering a new number in the box and pressing enter. You can also use the First/Previous – Next/Last buttons to scroll back and forth between pages.
4. If you have a large list of clients, using Advanced Search probably makes the most sense –

   a. To access Advanced Search, click on the Magnifying glass icon ( ) > ADVANCED SEARCH link
   b. Use the Filters to find the client you are looking for
      i. Choose column name to search
      ii. Choose the search operand (Begins With, Equal To, etc.)
      iii. Enter the text you are searching for, keeping in mind what operand you chose (if you chose Equal To and enter a partial name, you won't get a match)
      iv. To search more than one column, click on the + to add the operand, text box, and Boolean search for the second/additional column.
      v. Choose the Boolean search for the additional columns you are searching – AND or OR
      vi. Click on the Search button to find the client.
5. Add a New Client
   a. The ONLY way you can add a new client is to use Advanced Search > File > Add Demographics Search
   b. Search for the client like you do with Advanced Search.
   c. If the client is not found, an "Add New" button will display.
   d. Click the "Add New" button to open a new blank Basic Demographics page to fill out.
   e. Complete all required fields and any desired optional fields for the Basic Demographics client information.
   f. File > Save Demographics or Save and Close Demographics to save the new client demographic data.

Field Types

- Required fields (red asterisk like in other KDADS web applications)
- Linked fields – a black asterisk after a field name or select list indicates it is linked to another field. The selection you make in the first field affects what your selections are in the linked field.
- Date fields – type in date mm/dd/yyyy (slashes auto-inserted) or use the Date Picker.
- Formatted fields –
  - Phone number – just enter the numbers and it auto-formats with the ( ) and dashes in the appropriate places
  - SSN – auto-inserts the dashes in the appropriate places
- Address fields (Demographics page)
  - After entering the Address Type, Street, and Street 2, enter the correct Zip Code for that address and the City, State, and Residence County fields will auto-fill, based on the zip code.
  - If you need to update the zip code, make sure you clear all the address fields with a "Clear" button or the auto-fill will not work correctly.

  TIP: If you have auto-complete turned on for addresses in your browser, DO NOT select any part of an address from the pop-up select list. Unexpected results can happen with the rest of the record, including changing the name of the client! It is recommended that you turn off your browser's auto-complete feature to avoid issues like this.

- Multi-select or Shuttle fields –
  - Two columns – the left one contains all the possible choices for that field, the right contains which choices have been selected. The assessment forms use this type of field for some responses.

SUMMARY OF MAJOR POINTS FOR A BEGINNING WELLSKY HUMAN SERVICES USER:

1. When you first login to the WellSky production environment, set up your Security Q&As ( )
2. To see a list of clients, click on the magnifying glass ( ) > Advanced Search
3. To add a new client, click on > Advanced Search, then File > Add New Demographics Search

4. WellSky Human Services opens new windows as you click on links/shortcuts – Location Episodes, Ticklers, Assessments/Forms, etc. To stay organized and not lose your place in the application, it is recommended you close a window when you are done with it.
5. Get into the habit of using File > Save and Close to close windows, rather than the browser window's X. The X won't prompt you to save before closing. Using the File menu will.