See User Guide for more detailed information and screenshots

Mobile Device Setup

- Chrome is recommended as Internet Browser for better performance/speed
- Go to Mobile Assessment website URL (save bookmark, no app to install)
- Access URL and logon on mobile device for offline use
- Compatible with multiple operating systems and browsers if recent version

Navigation Functionality

- Search Participant (Consumer) by last name or DOB
Offline buttons
- Make Available Offline: download all existing documents for Participant
- Go offline or Go online: option if inconsistent mobile internet access
Menus
- Downloaded: Open Participant and document (cloud icon identifies if downloaded)
- History: retrieve records on device
Assessment buttons
- Save: toolbar at top of document
- Details: view/edit header fields
Navigation pane in Assessment
- Multiple options: Search by keyword, section headers (also instructions), next/previous buttons for required and unanswered fields, and scroll

Workflow Sequence

1. Prep in either WellSky Human Services application or Mobile Assessments online to enter data known previously or duplicate existing document
2. Download document to mobile device storage while on-line in Mobile Assessments
3. Work offline to enter and save data on mobile device during home visit
4. Upload (synchronize) document from mobile device automatically when connected to Internet in online mode (notification displays at bottom of application screen)
5. Remove record from mobile device after upload
6. Complete document Status
   - CM – PC Assessment Section 1 – use application to link to Service Plan to "push" Risks
   - RN – PC Assessment Section 2 – use mobile or application

Misc. Training Tips

- User ID and password: same as WellSky application
- Icons: explanation in user guide (page 16)
- Keyboard short-cuts: list in drop-down menu under login name
- Time-out: automatically locked after 20 minutes of inactivity (system requires log-in to unlock)