

West Virginia (WV)  
Bureau for Medical Services (BMS) and  
Bureau of Senior Services (BoSS)

Online Case Management (CM) Pilot  
Project

Orientation Training Guide

Final version, June 14, 2019

A large decorative graphic in the bottom right corner consisting of overlapping geometric shapes: a teal triangle pointing up and to the right, a dark blue triangle pointing up and to the right, and an orange triangle pointing up and to the right.

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# WellSky Human Services System – Navigation Basics

## A.1 Home Page: My Work Lists

WellSky Human Services Formerly Mediware Harmony

Welcome, Deanna Carpenter 2/20/2019 9:41 AM

My Work Sign Out

Role WV Admin GO

File

Quick Search

Participants Last Name GO v

ADVANCED SEARCH

MY WORK LISTS PARTICIPANTS AGENCIES REPORTS UTILITIES

MY PARTICIPANTS

Agencies

Closed	1
Hold	1
Open	21

Ticklers

Ticklers	2
----------	---

SUPERVISORS

Links

Survey Monkey
---------------

Tasks of Workers

Ticklers
Alert Notes
Agencies

The home page includes basic navigation and search functionality, as well as work lists.

The **Role** displays on the top-right corner, with a default value for each Worker. Users with multiple Roles can change it by selecting the value and clicking on the GO button. To **Sign Out**, click that button to the left of Role.

The **File** menu displays on the top-left corner throughout the system, with options that vary by screen. The most commonly used options are: Add, Save, Close, Save and Close, and Duplicate. The History option is useful to view changes to the record. The system has other menus including: Edit (for Demographics), Tools (for Notes), Word Merge, and Reports.

The **Chapters** display as tabs on the top of the home page, as well as each chapter (e.g., Participants, Agencies). Users navigate by clicking on the tab.

**My Work Lists** is organized in panes by topic, which display counts of records assigned to the Worker. Users select records by clicking on the hyperlink in each row. Users may hide work lists by clicking on the arrow icon to the right. To refresh the display after records are updated, users click on the browser icon or use the F5 key.

For **Ticklers** (reminders of tasks to be completed), users can also select the options in the fly-out menu to the right. To view ticklers with a due date in the future, users can uncheck the **Apply Alert Days Before Due** and click on the **Search** button to refresh the work list.

**File**

[File](#) - [Print](#) - [Close Agencies](#)

**Filters**

Status  Equal To  Open  AND

Participant

1 Agencies record(s) returned - now viewing 1 through 1

ID	Participant	Open Date	Status	Status Date	Primary Worker
11342	Burnside, Dana	01/30/2019	Open	1/30/2019 12:00:00 AM	Greenberg, Debby

<< First < Previous Retrieve 15 Records at a time Next > Last >>

**File**

**Filters**

Status  Equal To  New  AND

Last Name   ☒ Apply Alert Days Before Due

## A.2 Quick and Advanced Search

**Quick Search**

Participants  First Name    [ADVANCED SEARCH](#)

MY WORK LISTS **PARTICIPANTS** AGENCIES REPORTS UTILITIES

**Filters**

Last Name  Begins With   AND

First Name  Begins With   AND

Status  Equal To  Active  AND

Last Name

**Quick Search** is used to search for Participants with a single field; it is available to use by BoSS staff only for security reasons. **Advanced Search** is used to search with one or more fields, by clicking on that button to use the functionality.

Quick Search has three fields: value on the left, chapter in the middle, and field on the right. Users select the chapter and field, enter the value, and click on the GO button or Enter key to display record(s) in the list view. If multiple records match the search, they click on the hyperlink to view the desired record. If a single record matches, it displays automatically.

Advanced Search is used to query records with various filters, operators, and connectors (AND, OR). Users can change the default filters as needed, and then click on the Search button. The most common operators are: Equal To, Not Equal To, Begins With, and Contains. Users can remove filters by clicking on the X button and add filters by clicking on the + button.

### A.3 List Views

3 Service Plans record(s) returned - now viewing 1 through 3

	Type	Start Date ▼	End Date	Case Manager	Status	Update Date 1	Update Date 2	Update Date 3	Update Date 4
	6 Month	02/15/2019	08/05/2019	Carpenter, Deanna	Pending	02/27/2019			
⊞	6 Month	02/06/2019	08/10/2019	Hudson, Arlene	Active	02/07/2019			
	Initial	02/05/2019	08/05/2019	Wooten, Sherry	Active				

Each page and sub-page have a List View for selecting records and a Detail View for adding and editing a given record. The List View displays a grid with fields as column headers, some of which are available as search filters. Certain pages have search filters to help identify a record.

The system displays a maximum of 15 records per screen by default; users can increase the number by editing that and clicking the Next button. Alternatively, they can scroll through the screens to find a record using the buttons at the bottom: First, Previous, Next, Last. Users can sort records in a List View by clicking on a column header; they can sort in the opposite order by clicking twice.









### A.4 Fields and Formats

A record is a set or subset of data fields – such as Participant or Demographics. A field is a single data element. Fields have different formats including text, date, phone, checkbox, lookup, and multi-select.

- Date fields can be entered using the calendar to select it or typing without punctuation as MMDDYYYY.
- Phone fields are entered by typing the 10 digits without punctuation.
- Note Type and Note Sub-Type fields have lookup values that are linked.

A few fields have Search functionality (ellipsis with ...), such as Worker, Service, and Agency. Required fields are indicated by a red asterisk; records cannot be saved if any such fields are blank.

Multi-select fields are entered by highlighting the values on the left and clicking on the arrow buttons. The selected values display on the right. Users can select more than one value at a time with the Shift (consecutive) and Ctrl (non-consecutive) keys, like Windows.

Relationships (Family, Medical, Other)	Family - Aunt/Uncle	       	Family - Cousin
	Family - Child (under 18)		Medical - Other
	Family - Domestic Partner		
	Family - Grandchild		
	Family - In-Law		
	Family - Other		
	Family - Parent		

## A.5 Places

City	Charleston	▼	Clear
State	WV	▼	Clear
Zip Code	25301	▼	Clear
County	Kanawha	▼	Clear

The Places functionality links the four address fields above, including valid combinations in West Virginia based on the US Postal Service. This prevents users from selecting incorrect combinations. Users enter fields in any order; then the other fields are filtered or auto-populate if only one valid option.

## A.6 Keyboard Keys

The WellSky system has some of the same functionality as common MicroSoft applications for short-cuts using keyboard keys, instead of selecting with the mouse.

- Enter: Users can click on the “Enter” key, instead of the “Go” button, when doing a Quick Search (but not for Advanced Search or Relations Search).
- Tab or Shift-Tab: Move from one field to the next within a Page or screen (forward or backward)
- Home or End: Move from beginning or end of text in field
- PgUp or PgDn: Scroll
- Ctrl C or Ctrl X or Ctrl V: Copy, cut, or paste text
- Ctrl F: Find text on screen
- F5: Refresh screen display, especially for My Work Lists

## Overview of Participants Chapter

Test, WellSky (10001)					
Agencies	LOS & Dates	Assignments			
Demographics	Case Relations	Clinical Documents	Service Plans	Notes	

The Participants chapter is configured to organize and match the data collected for the ADW Program. Participant records are structured by defining common data fields on various pages and sub-pages.

*Examples: Date of Birth in the Demographics page; Level of Service in the Program page*

Paper forms with non-standard questions are setup as Clinical Documents.

*Examples: Contact – Case Management Monthly; Person-Centered Assessment – Section 1 (CM)*

KEPRO has a core data set for ADW eligibility and Level of Service determination in a separate system including demographics, legal representatives, and agency enrollments. Those data are converted to the WellSky system. The fields included in the conversion are noted in *italics*.

The Participant data structure is shown in Appendix A, with pages and sub-pages grouped as follows:

- People – Demographics, Case Relations
- Enrollment – Agencies, LOS & Pages, Assignments
- Documentation – Clinical Documents, Service Plans, Notes

## B.1 People

### B.1.a Demographics

#### List View

Test, February (11344)			
Assignments		Program	Agencies
Demographics	Case Relations	Clinical Documents	Service Plans
Notes			
Basic Info			
ID	11344	Gender	Female
Last Name	Test	Medicaid ID	123123123
First Name	February	KEPRO ID	456456
Date of Birth	2/1/1919	Legal Representative	Yes
Age	100		
Contact Info			
Address Type (Primary)	Physical	County	Kanawha
Street	1 Main St	Directions to Home	directions
Street 2	Apt 2	Home Phone	(304) 304-3044
City	Charleston	Work Phone	(305) 305-3055
State	WV	Mobile Phone	(306) 306-3066
Zip Code	25301	Email	wv@gmail.com
Insurance Info			
Medicare Insurance	B only	Private Insurance	Humana

The main page has three sections for Basic Info (including IDs), Contact Info (including primary address), and Insurance Info (Medicare and private). The Addresses sub-page has both physical and mailing address. The list view displays most but not all fields.

*Conversion: Most data fields are populated.*




## B.1.1.b Case Relations

### List View

Last Name ▲	First Name	Primary Relationship	Crisis Backup	Active	Street	Street 2	City	State	Zip	Home Phone	Work Phone	Cell Phone	Email	Fax
Test	Relation	Legal - Unspecified	No	Yes	314 Viola Road		Charleston	WV	25314			(304)221-6677		

### Detail View



February Test  
 Last Updated by dgreenberg  
 at 2/4/2019 5:20:58 PM

**Case Relations**

---

File
Word Merge

**Last Name \***

**First Name \***

**Date of Birth**

**Primary Relationship \***

**Other Relationships**

**Crisis Backup**

**Active**

**Comments**

Test

Relation

Legal - Attorney ▼

Family - Aunt/Uncle  
 Family - Child (under 18)  
 Family - Domestic Partner  
 Family - Grandchild  
 Family - In-Law  
 Family - Other  
 Family - Parent

▲  
▶  
▼  
◀

Family - Cousin

☒

☒

Legal representatives and people related to the Participant (e.g., family, medical, other) are entered with the types of relationships specified. Relations who serve as Crisis Backup are identified with a checkbox field. There is an optional field for Comments and a section for Contact Info.

*Conversion: Legal Representative is populated with the Primary Relationship value as 'Legal – Unspecified', to be updated by the CM.*




## B.2.b LOS & Dates

### List View

	Level of Service	Anchor Date	Case Manager	Status ▼	Status Date	Close Date
	D	02/04/2019	Hudson, Arlene	Open	02/04/2019	

### Detail View



WellSky Test  
Last Updated by dgreenberg  
at 3/17/2019 11:29:18 AM

**LOS & Dates**

---

**File**

**LOS & Dates**

Workers

Track Status

**LOS**

Level of Service \*  
Dual Services \*

D ▼  
Yes ▼

**Dates**

Anchor Date \*  
Enroll Date \*  
Financial Eligibility Effective Date  
PAS Date

02/18/2019  
02/18/2019

**Status**

Assignments \*  
Program \*  
Service Delivery Model \*  
Status \*  
Status Date \*

ADW  
Aged and Disabled Waiver  
Traditional  
Open  
02/18/2019

[Details](#)

The Level of Service (A, B, C, D) and Anchor Date are identified. The Financial Eligibility Effective and PAS Dates are entered by the CM. Pilot Participants have a Status value as 'Open', like Assignments. The Track Status sub-page displays changes made to Status (e.g., 'Hold' during hospitalization).

*Conversion: Most data fields are populated, with the Status Date as 1/1/19. The Workers sub-page is populated for CM only.*

## B.2.c Assignments

### List View

1 Assignments record(s) returned - now viewing 1 through 1

Case Manager	Registered Nurse	Status	Open Date ▼	Close Date
<a href="#">Hudson, Arlene</a>	<a href="#">Hill, Randy</a>	Open	02/04/2019	

### Detail View



WellSky Test  
Last Updated by dgreenberg  
at 2/18/2019 5:54:47 PM

#### Assignments

File	
Assignments	
Assignments *	ADW
Case Manager *	Greenberg, Debby ... Clear Details
Registered Nurse *	Wooten, Sherry ... Clear Details
Take Me Home, WV *	No ▼
Status *	Open ▼
Open Date *	02/18/2019

The CM and RN are identified, as well as Take Me Home, WV. Pilot Participants have a Status value as 'Open, which displays as 'Active' in Advanced Search. Other ADW Participants have a Status value as 'Closed', which may be updated to 'Open' if they replace a Pilot Participant.

*Conversion: All fields are populated, with the Open Date as 1/1/19.*


## B.3 Documentation

### B.3.a Clinical Documents

#### List View

Clinical Document	Type	Date ▼	Worker	Status	Last Modified
Person-Centered Assessment - Section 1 (CM)	Initial	02/13/2019	Greenberg, Debby	Complete	2/13/2019 6:50:43 PM
Person-Centered Assessment - Section 2 (RN)	Initial	02/13/2019	Greenberg, Debby	Draft	2/15/2019 10:46:59 AM
Service Plan - Supplement	Initial	02/13/2019	Hill, Randy	Draft	2/13/2019 8:55:07 PM

#### Detail View

 **WellSky** Human Services  
Formerly Mediware Harmony

February Test  
2/15/2019 6:18 PM

**Clinical Documents**

File

Please Select Type:

Clinical Documents

Type \*

Date (Assessment / Service Plan Start / Contact) \*

02/15/2019

Worker \*

Greenberg, Debby

...

Clear

Details

Status \*

Draft

Assignments \*

ADW

Date Completed

There are seven documents adapted from the current paper forms, plus tracking due dates as follows:


- Contact – Case Management Monthly
- Contact – Registered Nurse
- Person-Centered Assessment – Section 1 (CM)
- Person-Centered Assessment – Section 2 (RN)
- Service Plan – Interim
- Service Plan – Supplement
- Timeliness Tracking

The header fields are the same across documents. Users select one of the six Type values: 6 Month, Annual, As Needed, Contact, Initial, Initial – Transfer Agency. Initial is for new ADW Participants enrolled as part of the Take Me Home (TMH), West Virginia program.

Users are required to complete all required fields to save the record with the Status value as 'Complete' or 'Active' (used for Service Plan – Supplement only). The system does not enforce this requirement with the Status value as 'Draft'.

The Date Completed field auto-populates when the Status is 'Complete', and the record is locked after saving. Users can duplicate a document to update a new version (e.g., 6 Month follow-up).

### B.3.b Service Plans

 **WellSky** Human Services  
Formerly Mediware Harmony

BoSS Test  
Last Updated by dgreenberg  
at 6/13/2019 5:49:29 PM

**Plan Info and Dates**









**File** **Reports**

Plan Info and Dates

Risks and Interventions

Services

QA Review

Type *	6 Month	▼
Start Date *	06/01/2019	
End Date *	11/30/2019	
Case Manager *	Greenberg, Debby	▼
Registered Nurse *	Wooten, Sherry	  Clear <a href="#">Details</a>
Status *	Pending	▼
Update Date 1		
Update Date 2		
Update Date 3		
Update Date 4		
Last Modified	6/13/2019 5:49:29 PM	
Last Modified By	dgreenberg	
Comments	<div></div>	
Comments	<div></div>	

The Service Plans page has three sub-pages, as displayed above on the left-side. (The last one for QA Review is used by BoSS staff only.) The Service Plan – Supplement is in the Clinical Documents page. The information in the paper form was reorganized to fit this data structure. The summary report is organized like the paper form.

The “shell” of the Plan is created by completing the Person-Centered Assessment – Section 1 (CM) and linking it to a new Plan. This link enables the Risks entered in the Assessment to be pushed to that sub-page in the Service Plan. It is created with the Status value as ‘Draft’ and updated to ‘Active’ by the CM after the documentation is done. The Status is updated to ‘Complete’ at the end of the Service Plan period.

The CM is responsible for completing the original version of the Service Plan. Both the CM and RN can update it for minor changes as needed. Simple changes are documented in Plan Info and Dates, using the Update Date and Comments fields. Details can be documented in Notes, which has functionality for Attachments and Note Recipients. For CMs, common updates include changes in risks, resources, or services. For RNs, common updates include PAL changes in days/hours/times of service.

### B.3.b.1 Plan Info and Dates


#### List View

Type	Start Date	End Date	Case Manager	Status	Update Date 1	Update Date 2	Update Date 3	Update Date 4
6 Month	02/15/2019	08/05/2019	Carpenter, Deanna	Pending	02/27/2019			

This sub-page identifies basic info and stamps the record with the date/time and worker last modified.

### B.3.b.2 Risk and Interventions

#### List View

 **WellSky** Human Services  
Formerly Mediware Harmony

Conversion Training  
1/2/2019 4:07 PM

**Risks and Interventions**

File

[Plan Info and Dates](#)  
**[Risks and Interventions](#)**  
[Services](#)  
[Plan Notes](#)

**Risks and Interventions**  
[COLLAPSE ALL](#)  
[ADD RISK](#)  


☐ **Risk:** In-Home - No Running Water

Active

**Intervention:** Work with community resources: Obtain well or repair well pump

Active

#### Detail View - Risk

 **WellSky** Human Services  
Formerly Mediware Harmony

Conversion Training  
Last Updated by dgreenberg  
at 12/31/2018 7:53:32 PM

**Risk**

File

**Risk**

Primary☐


ID \*62

RiskIn-Home - No Running Water

StatusActive

Date Added or Edited01/01/2019

#### Detail View - Intervention

 **WellSky** Human Services  
Formerly Mediware Harmony

Conversion Training  
Last Updated by dgreenberg  
at 12/31/2018 7:53:59 PM

**Intervention**

File

ID \*8108

InterventionWork with community resources: Obtain well or repair well pump

StatusActive

Date Added or Edited01/01/2019

After the Risks are pushed from the Assessment, the CM reviews and updates the Status value from 'Proposed' to 'Active'. Then the CM adds Interventions for each Risk from a searchable list linked to a given Risk. The CM can enter free-text for Interventions (not Risk), especially for the value 'Other'.

### B.3.b.3 Services

#### List View

1 Services record(s) returned - now viewing 1 through 1

+	Service Description	Agency ▲	Start Date	End Date
	Case Management	A Special Touch for Seniors	02/13/2019	02/28/2019

#### Detail View

Service

Start Date \*

02/13/2019

End Date \*

02/28/2019

Service Code \*

G9002

...

Service Description

Case Management

Agency ID \*

10003

...

Details

Agency

A Special Touch for Seniors

Amount and Frequency

3 times per week, 2 times per day

Comments

The CM enters each ADW service for the Participant. The Start/End Date range is auto-populated from the Plan Info. After selecting the Service Code, the Service Description is auto-populated. The CM selects the Agency and enters the Amount and Frequency. Comments may be added as needed.

### B.3.c Notes

Agency users enter Notes using the Note Type "Case Note" based on their Roles (CM, RN, Supervisor). They add Notes with the Note Type "Documentation" to upload attachments with the relevant Category (Legal, Medical, Other, PAL, PC POC, Signature Page)

The Status value defaults as 'Draft', which can be viewed by that worker only. Users update it to 'Pending' to be viewed by others while incomplete. When final, they update it to 'Complete'.



For Alert Notes, users update the Status to 'Alert' to enable a pop-up message as well as to display in a work list, along with the Note Recipient. Users "Mark as Read" with the Tools menu. They can append text in 'Pending' or 'Alert' Notes.

BoSS users enter other Note Types that are read-only for Agency workers as follows: Case Transfer, New Participant, Quality Assurance, Technical Assistance.

## C. Misc. Topics

### C.1 Status Values

The Status field has different values to select on various pages. What follows is an explanation for use.

- Active: Service Plans are updated as 'Active' and editable during the plan period. This includes the sub-pages Plan Info and Dates as well as Risks and Interventions, plus the page Clinical Documents for the Service Plan – Supplement.
- Alert: Notes are marked as 'Alert' to display in that work list, as well as a pop-up message when the Participant record is selected.
- Closed: Enrollment pages are marked as 'Closed' when the Participant has left the ADW program or the pilot, as well as those not selected for the pilot.
- Complete: Documentation pages are marked as 'Complete' when data entry is done.
- Draft: Clinical Documents and Notes default as 'Draft'.
- Hold: Agencies can be updated as 'Hold' if a Participant is temporarily inactive in ADW.
- Not Ready for QA Review: For use by BoSS Reviewers on Service Plans as appropriate.
- Open: Enrollment pages are marked as 'Open' when the Participant is active in the pilot.
- Pending: Service Plans default as 'Pending' when the system links from the PCA – Section 1 (CM). Agency workers can mark Notes as 'Pending' to enable supervisors to view and edit.
- Pending RN: For use by CM if Service Plan is done except for any information required from RN.
- Proposed: Risks default as 'Proposed' when the system links and pushes Risks.

## C.2 Role Security and Permissions

Seven Roles are configured: Case Manager (CM), CM Supervisor, CM and RN Supervisor, Registered Nurse (RN), RN Supervisor, BoSS Reviewer, and WV Admin. Roles vary in access level to Participant records, access to reports, security permissions (add, edit, read-only, delete), and minor differences in the display of pages and work lists.

Access Level: Agency workers can view Participants assigned to themselves. Supervisors can view those of their workers. BoSS staff can view all Participants.

Report Groups: Agency workers can use operational reports, including the Assessment and Service Plan summaries and standard Notes reports. BoSS Reviewers can use those plus Participant lists by Agency and Case Manager in the Reports chapter; supervisors can view similar lists in the Agencies chapter.

Supervisor Permission: Supervisors and BoSS staff can “Unlock” or “Reverse Disposition” for records marked as complete. It also enables Supervisors to view Supervisor work lists for their workers.

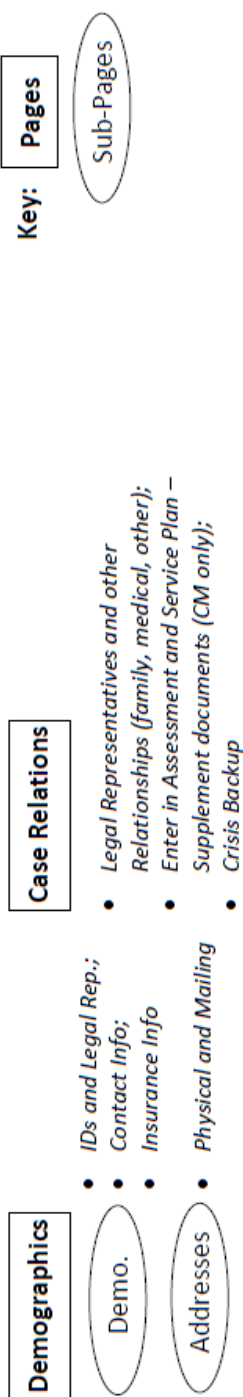
Security Permissions: BoSS staff can add new Participants; Agency workers can edit (but not add) Demographics. Supervisors can add/edit their own workers, and delete Clinical Documents, Service Plans, and Notes. Appendix C summarizes the differences in permissions for Agency Workers by page and sub-page.

## Appendix A – Participant Data Structure

### WV Online CM Pilot: Participant Chapter - Data Structure

Revised Jun. 13

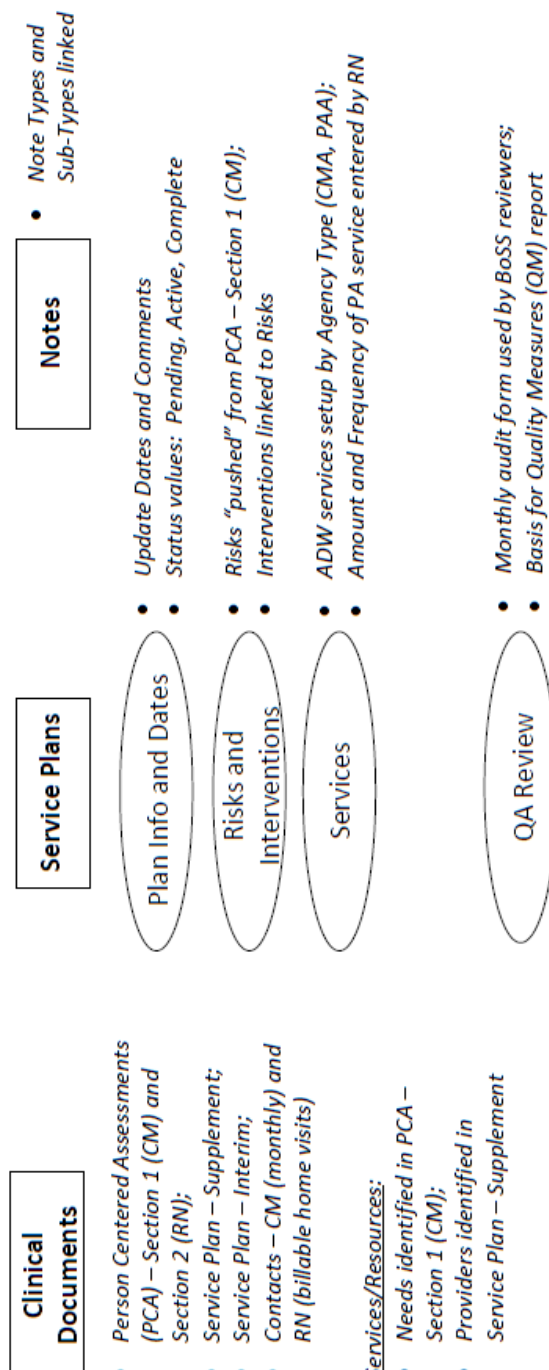
People:



Enrollment:



Documentation:



## Appendix B – Role Permissions for Agency Workers

### WV Role Permissions for Agency Workers

Role	People			Enrollments			Documentation		
	Demographics	Relations	Agencies	Agency Wkr.	LOS & Dates	Assignments	Clinical Docs.	Service Plans	Notes
CM	Edit	Add/Edit	Read	Read	Edit	Hide	Add/Edit	Add/Edit	Add/Edit
CM Supervisor	Edit	Add/Edit	Edit	Add/Edit	Edit	Edit	Add/Edit/Del	Add/Edit	Add/Edit/Del
RN	Edit	Add/Edit	Read	Read	Edit	Hide	Add/Edit	see below	Add/Edit
RN Supervisor	Edit	Add/Edit	Edit	Add/Edit	Edit	Edit	Add/Edit/Del	Add/Edit/Del	Add/Edit/Del

Key:	Edit	Read	Hide	Add/Edit/Del
------	------	------	------	--------------

Service Plans for RNs:		Info + Dates	Services	Risks + Interv.
		Edit	Edit	Read