

WV Online Case Management (CM) Pilot Project

WellSky Basics

Revised Feb. 20

A. Home Page: My Work Lists

The screenshot displays the WellSky Human Services interface. At the top, the logo and 'Human Services Formerly Mediware Harmony' are visible. A user welcome message 'Welcome, Deanna Carpenter' and the date '2/20/2019 9:41 AM' are shown. Navigation links include 'My Work', 'Sign Out', and a 'Role' dropdown menu set to 'WV Admin' with a 'GO' button. A 'File' menu is located on the left. Below the navigation bar is a 'Quick Search' section with input fields for 'Participants' and 'Last Name', a 'GO' button, and a link to 'ADVANCED SEARCH'. The main content area features tabs for 'MY WORK LISTS', 'PARTICIPANTS', 'AGENCIES', 'REPORTS', and 'UTILITIES'. The 'MY WORK LISTS' tab is active, showing two panels: 'MY PARTICIPANTS' and 'SUPERVISORS'. The 'MY PARTICIPANTS' panel lists 'Agencies' (Closed: 1, Hold: 1, Open: 21) and 'Ticklers' (2). The 'SUPERVISORS' panel lists 'Links' (Survey Monkey) and '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.



Human Services
Formerly Mediware Harmony

Welcome, Debby Greenberg | **Agencies** | [Skip to main content](#)

2/11/2019 11:11 PM

File

File - Print - Close Agencies

Filters

Status

Equal To

Open

AND

×

Participant

+

Search

Reset

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 >>



Human Services
Formerly Mediware Harmony

Welcome, Debby Greenberg | **Ticklers**

12/6/2018 6:29 PM

File

Filters

Status

Equal To

New

AND

×

Last Name

+

☒ Apply Alert Days Before Due

Search

Reset

B. Quick and Advanced Search

Quick Search

Participants

First Name

GO

⌵

[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

+

Search

Reset

Quick Search is used to search for Participants with a single field. **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.

C. 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.

D. 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. There are different formats for fields 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.

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.

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.

