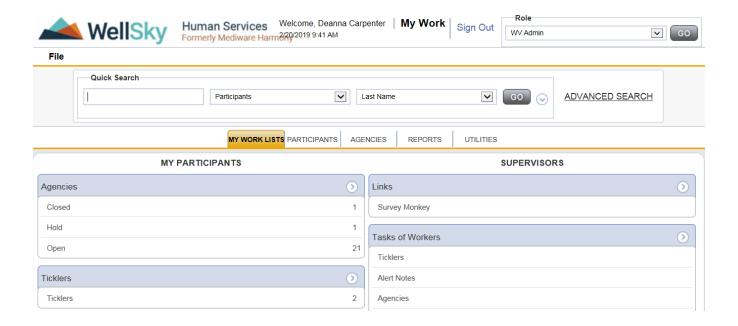
# WV Online Case Management (CM) Pilot Project WellSky Basics

Revised Feb. 20

### A. Home Page: My Work Lists



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

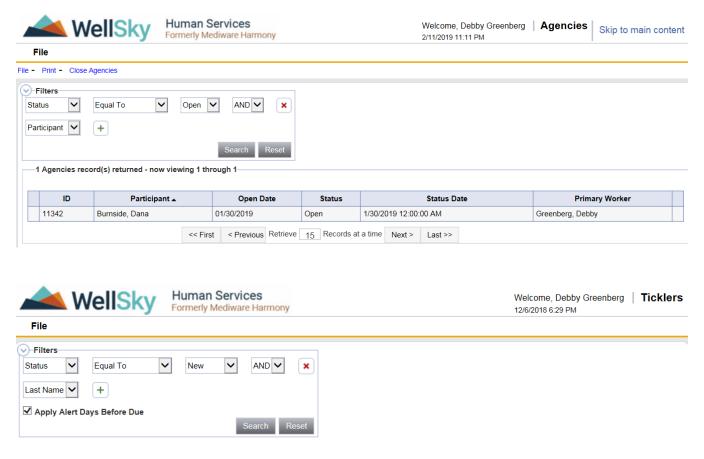
The **Role** displays on the top-right corner, with a default value for each Worker. Users with multiple Roles can change it by selecting the value and clicking on the GO button. To **Sign Out**, click that button to the left of Role.

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.

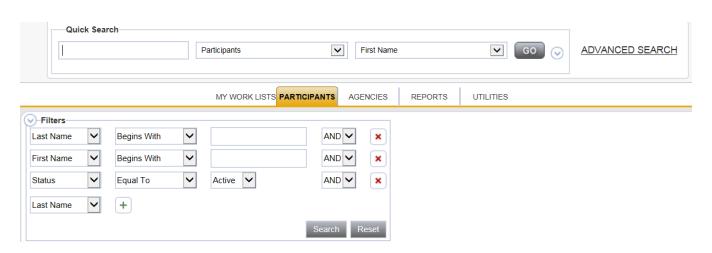
The **Chapters** display as tabs on the top of the home page, as well as each chapter (e.g., Participants, Agencies). Users navigate by clicking on the tab.

**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.



## B. Quick and Advanced Search



**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 recor	d(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.

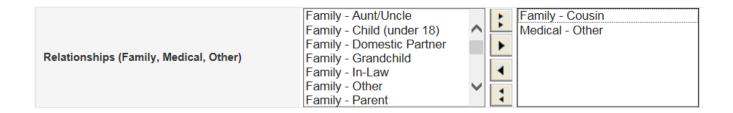
# D. Fields and Formats

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.



#### E. Places



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.

# F. 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.

- <u>Enter</u>: 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).
- <u>Tab</u> or <u>Shift-Tab</u>: 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
- <u>Ctrl C</u> or <u>Ctrl X</u> or <u>Ctrl V</u>: Copy, cut, or paste text
- Ctrl F: Find text on screen
- <u>F5</u>: Refresh screen display, especially for My Work Lists