Community Services

Clients Data Entry Workflow

Version #CS5.15.10

Release Date: September 2024

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Contact WellSky Support

Please be sure to identify your full name and the name of your organization in voicemails or emails.

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Introduction

Clients are at the center of Community Services. If your organization uses the Calls Module, clients can be anonymous or you can choose to add a client record, which provides a place for historical and current information about the client, their service transaction history, and household members.

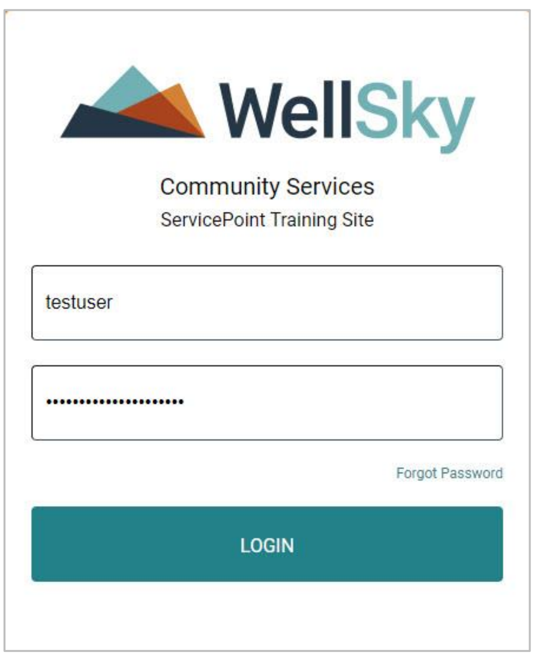
When a client record is added, you can add service referrals for other organizations who use Community Services.

NOTE – Community Services can be configured in many ways. Your screenshots may look slightly different than what you see in this guide.

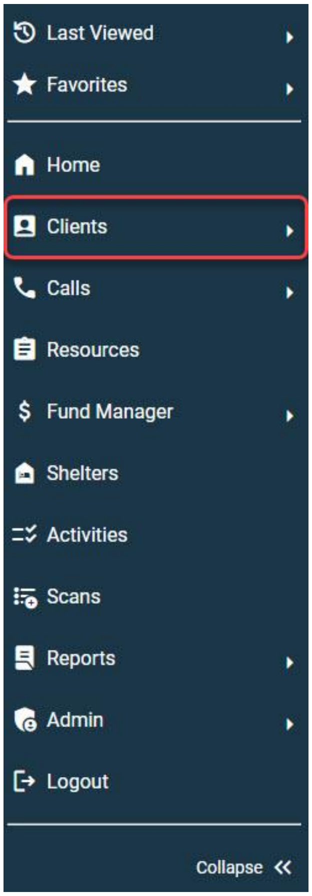
Search for a client record

It's important to always search for an existing client record before adding a new one. This ensures data integrity and prevents duplicate records. Each client should have only one record so that their complete profile and history is accurately maintained.

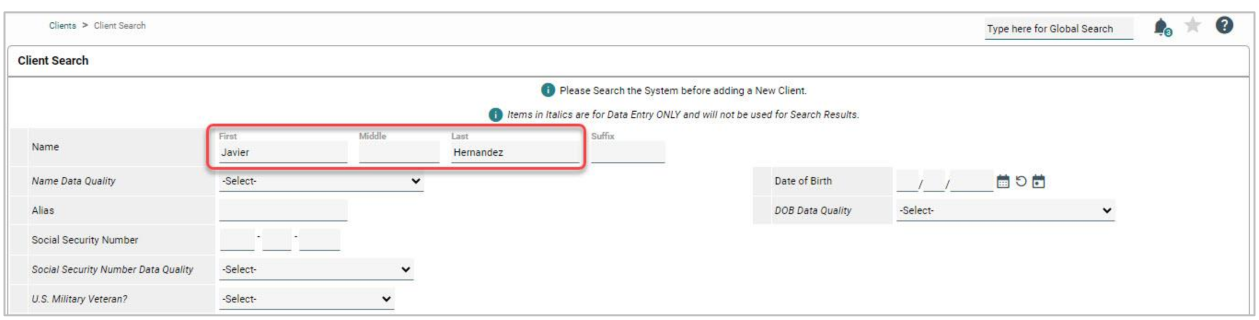
1. Log onto Community Services.



2. From the Side Navigation Panel, click **Clients**.

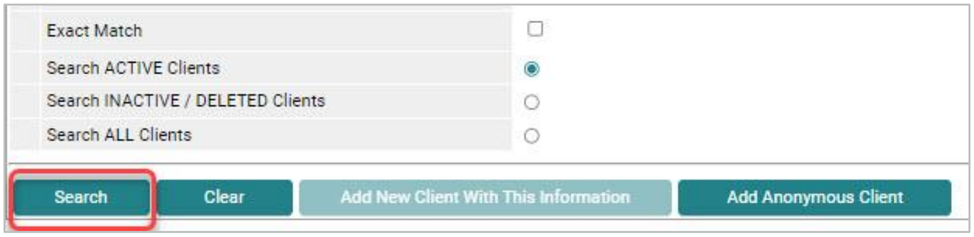


3. Search for the client using one or more search terms such as their first and last name, Social Security Number, or Date of Birth.



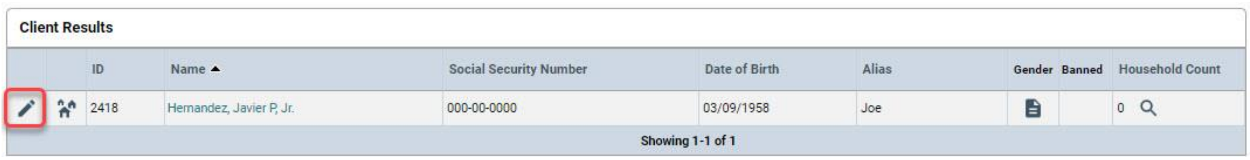
4. At the bottom of the screen, you can specify the search type. The default is Search ACTIVE Clients.

5. Click **Search**.



6. Possible matching records are displayed at the bottom of the screen. In this example, a client record was found but it isn't a complete match. The search is for Javier Hernandez, and not for Javier P. Hernandez, Jr.

   a. If the record is a match, click **Edit** to update it.



Client Results

		ID	Name ▲	Social Security Number	Date of Birth	Alias	Gender	Banned	Household Count
		2418	Hernandez, Javier P, Jr.	000-00-0000	03/09/1958	Joe			0

Showing 1-1 of 1

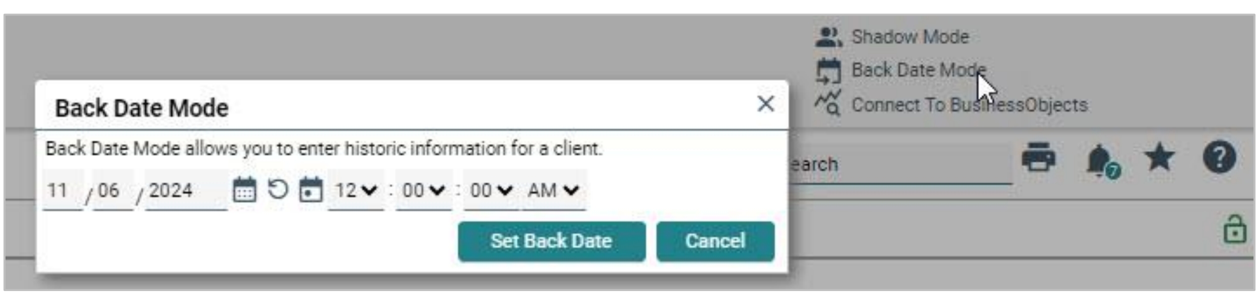
Back Date Mode

The Back Date Mode allows you to enter client and assessment information for a date prior to the current date. When you're entering dates, the date automatically defaults to the Back Date Mode date that you specify. This is an optional provider setting, so you may not be able to use Back Date Mode with every provider.

If the Back Date feature is enabled a confirmation screen is displayed before you can open the client record.

1. To use the Back Date Mode, click **Back Date Mode** in the upper right corner of the screen.

2. Change the date and click **Set Back Date**.



   a. When you're using Back Date Mode, a green banner is displayed at the top of the page.

3. To return to using the current date and time, click the arrow next to Back Date Mode.

Create a named client record

The client record, or profile, is large and organized by tabs along the top, and sections on each tab. It is also customizable by your organization, so you may or may not see all the tabs and sections that are shown in this guide. Although there are options to add substantial data for each client, you won't use all the options. Check with your administrator for information on what parts of the client record your organization uses.

NOTE – Anonymous clients can also be added to Community Services. See Create an anonymous client record for more information.

Tabs along the top of the Client Profile screen group information together and allow you to see similar information on one screen. There are two main tabs: Client Information and Service Transactions. Within these general tabs, additional tabs are displayed.

After searching for a client record and a match isn't found, add a new client record to Community Services.

1. From the Clients Module, follow steps 1-5 in Search for a client record. If no matching record is found, click **Add New Client With This Information**.

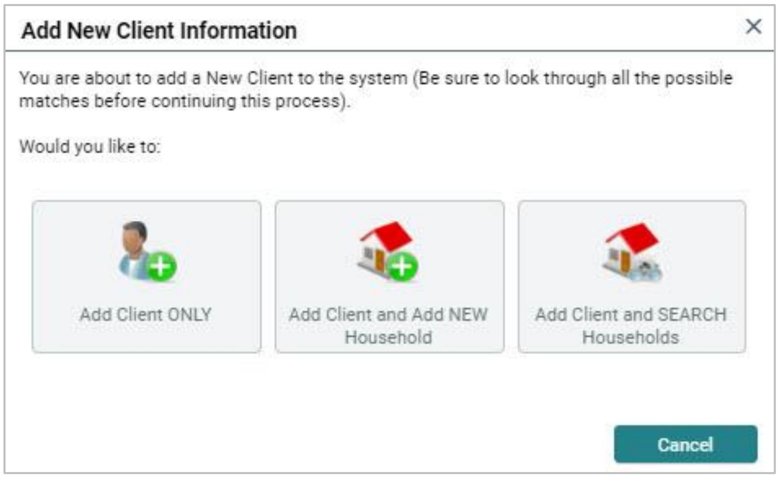
TIP – For steps on how to create an anonymous client, see Create an anonymous client record.

2. Select the relevant option. You may not see all options, depending on how your organization has configured Community Services. For this example, Add Client ONLY is selected.

a. **Add Client ONLY:** Add the client record without household members.

b. **Add Client and Add NEW Household:** Add the client record and household members.

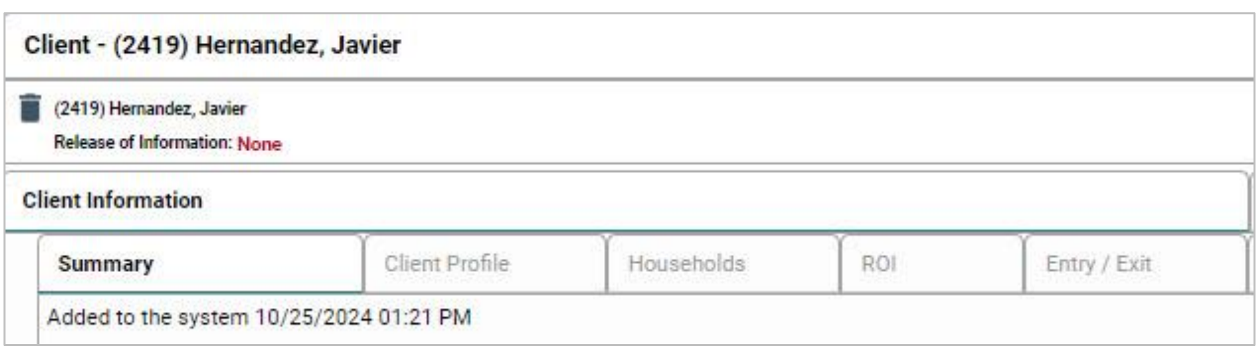
c. **Add Client and SEARCH Households:** Add the client record and search for existing households.



3. The Client Profile is displayed.

Client Information tab

- **Summary:** Displays summary information about the client.
- **Client Profile:** aka the client record. This tab includes demographic and insurance information, notes, incidents, and a section to attach files.
- **Households:** Lists members of the household and their demographic information.
- **ROI:** The ROI tab is where Release of Information data is stored.
- **Entry / Exit:** Lists the client's (and household members) program entry and exits.

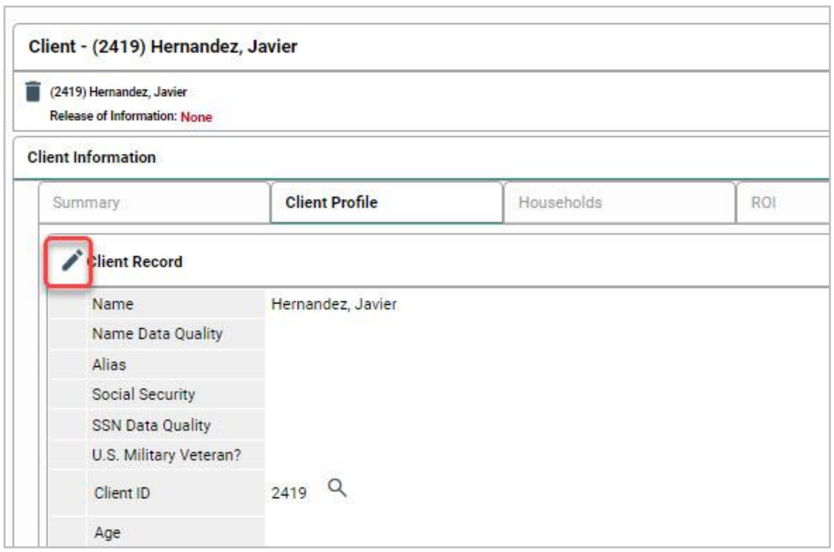


Client Profile tab

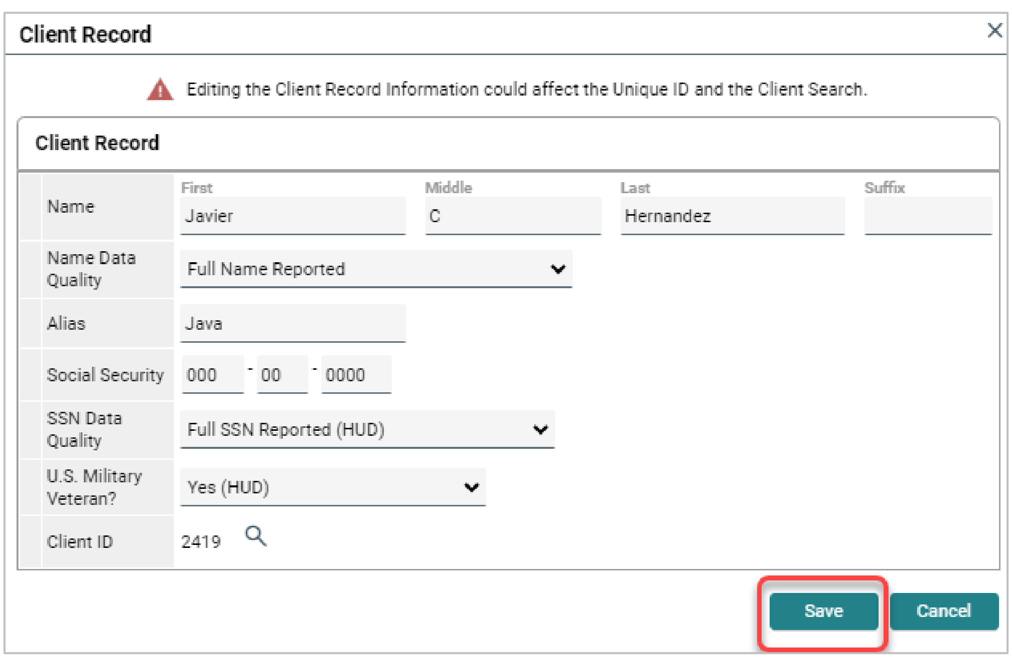
The Client Profile tab is a summary of client information, including demographics, a photograph, Medicaid Pre-Authorization Codes, call records (if your organization has licensed the Calls add-on module), notes, file attachments, and incidents.

When you create a new client record, the Client Profile tab is the first place to begin entering client details.

1. To begin editing, select the **Client Profile** tab, if needed. Then click **Edit** in the Client Record.



2. Complete the information as known, then click **Save**.

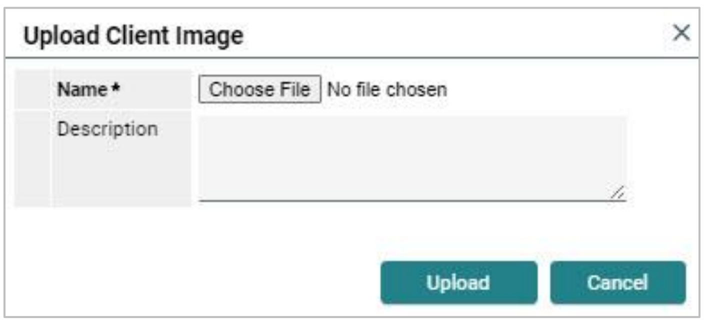


3. To add a client photograph, click **Change.**

4. Click **Choose File** and browse to the image you want to upload.

5. Select the image and click **Open**.

6. In the Upload Client Image window, click **Upload.**

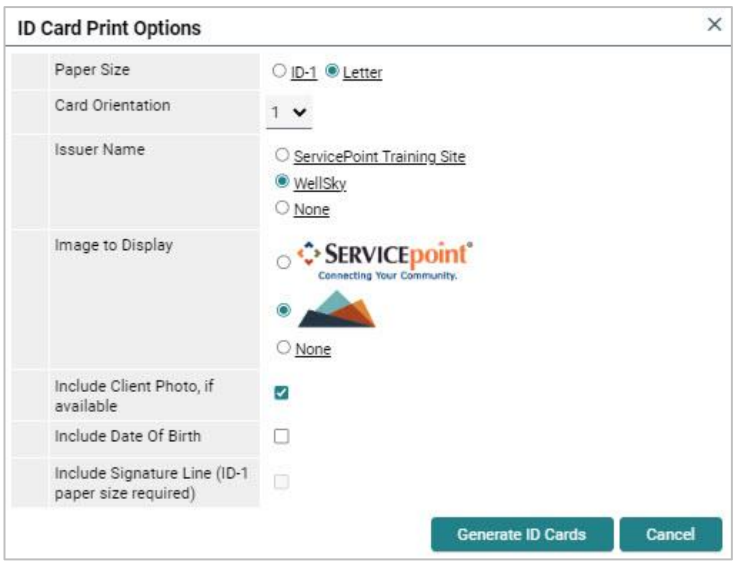


Print Client ID cards

From the Client Profile tab, you can print ID cards.

To create an ID card, click **Issue ID Card**.

Select options and then click **Generate ID Cards**.



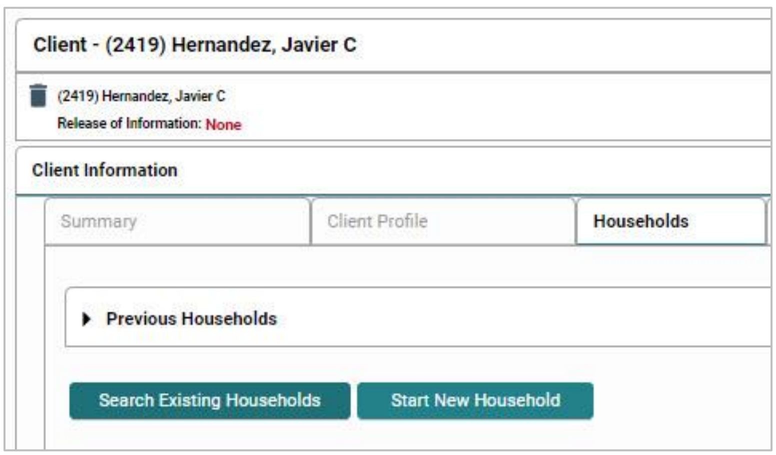
The ID card can be printed, and the Client ID barcode scanned to quickly enter the client's information for other functions in Community Services.

Households tab

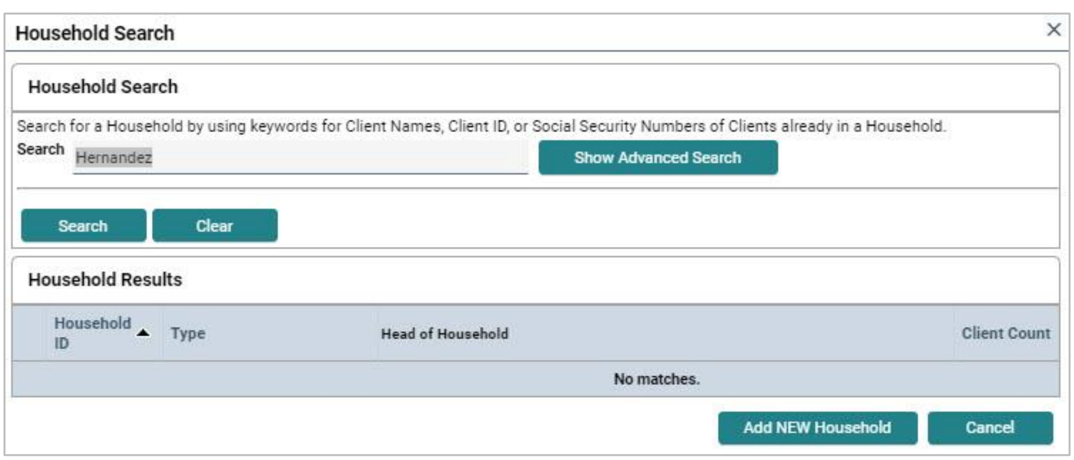
If the client is a member of a household or the head of a household, information about the household members is added to the client record, on the Households tab. Each household member has a client record, and the records are linked together to form a household. Follow these steps to create a household.

Add a household

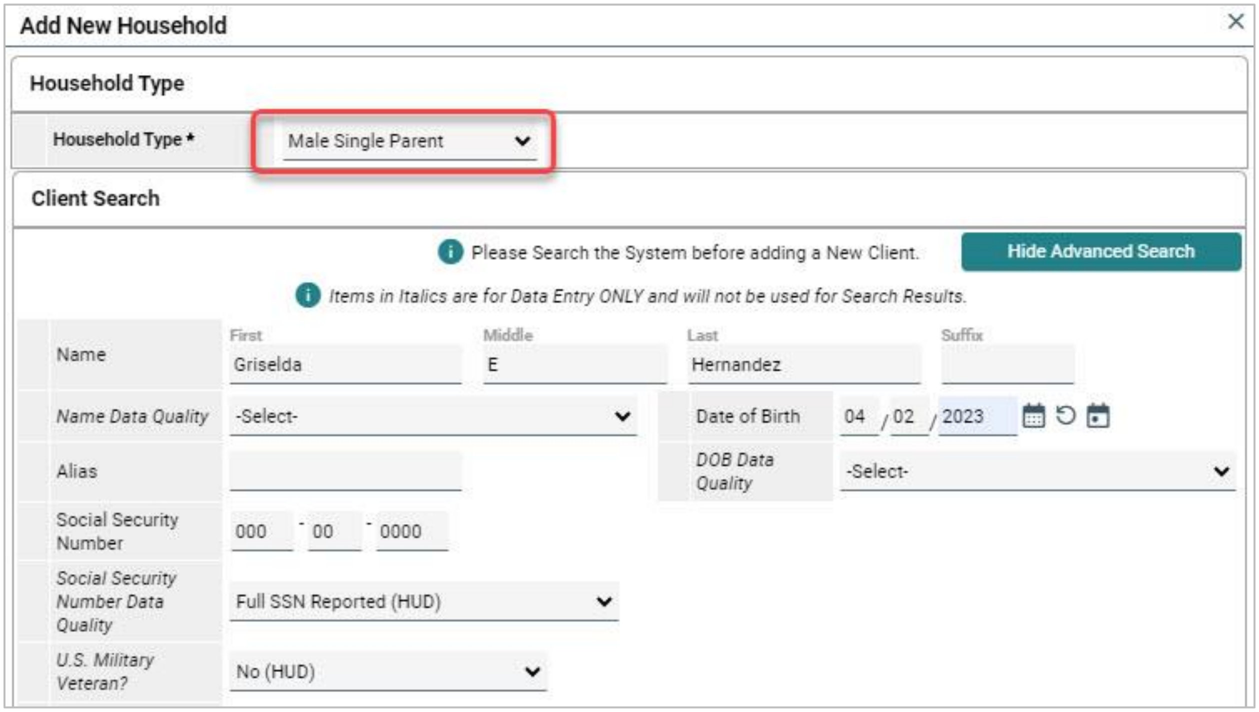
1. Click **Clients** from the Side Navigation panel.
2. Search for and open the client record.
3. Click the **Households** tab.
4. Click **Search Existing Households** to locate existing households that may be associated with the client.



5. Matching households are displayed. If the households are not a match, click **Add NEW Household**.



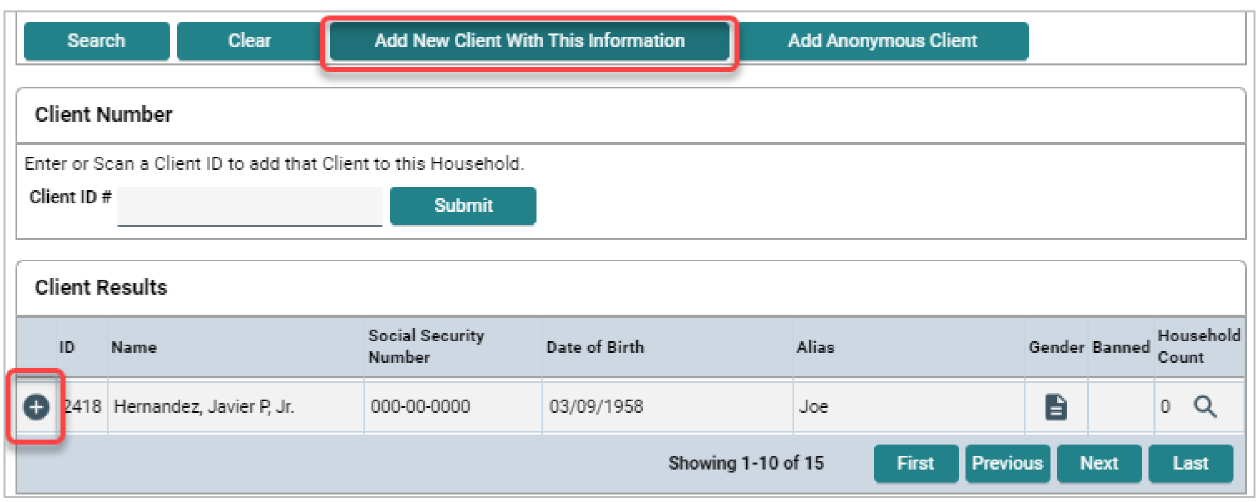
6. Select the **Household Type**.



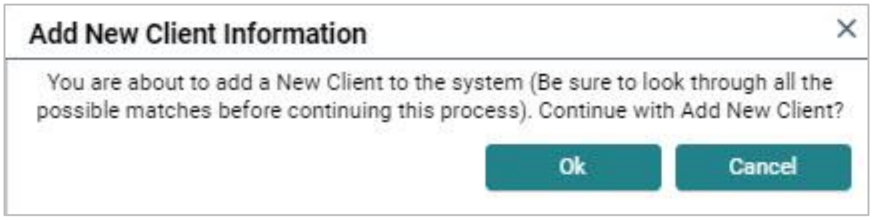
7. Enter the first household member, adding as much information as is known, then click **Search** at the bottom of the screen to search for possible matching records.

   a. If a matching record exists, click **Add** to add the client to the household.

   b. If a matching record does not exist, click **Add New Client With This Information**.



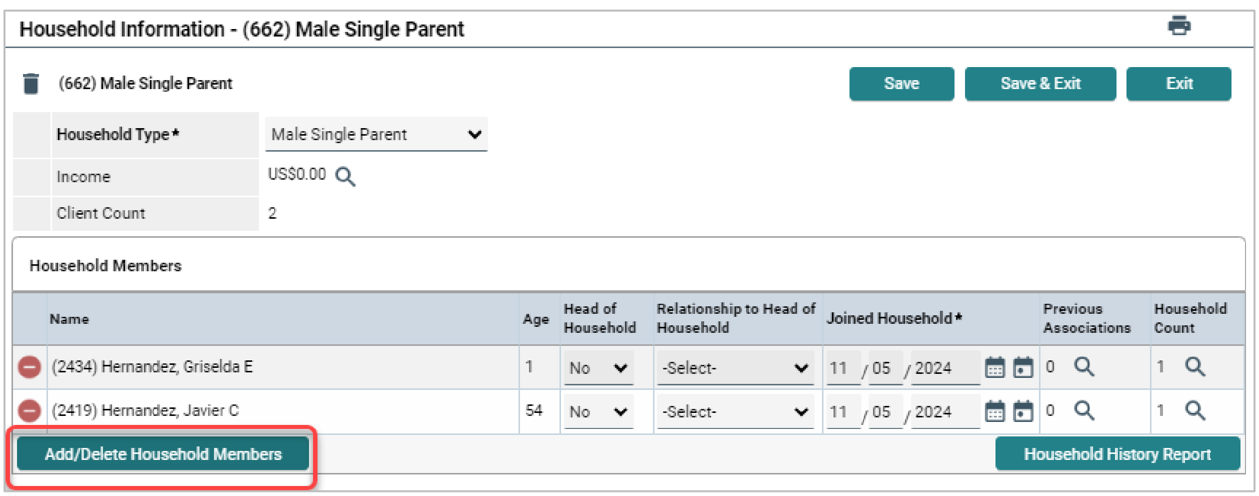
8. A message is displayed, click **Ok**.



   a. The new household member is added and is displayed in the Selected Clients section.

9. Click **Continue**.

10. To add additional household members, click **Add/Delete Household Members**.



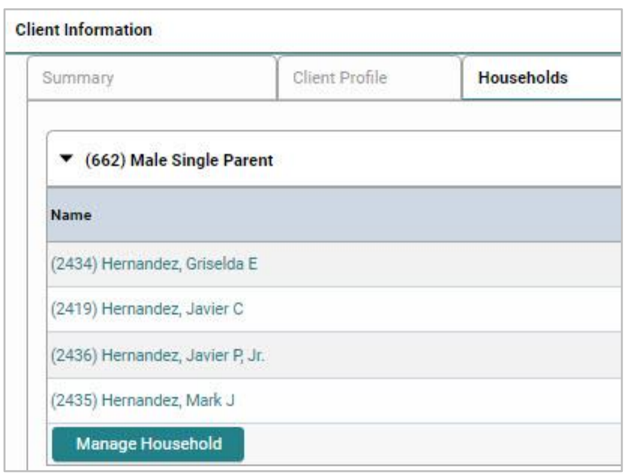
11. Repeat the steps above and continue to add household members, as needed. When you're finished, click **Save & Exit**.

TIP – Complete the profile for each household member. This can be done when their record is created or as information becomes available. Best practices recommend that that the Head of Household fields, Relationship to Head of Household, and the Household Type fields are completed when the household member is added.

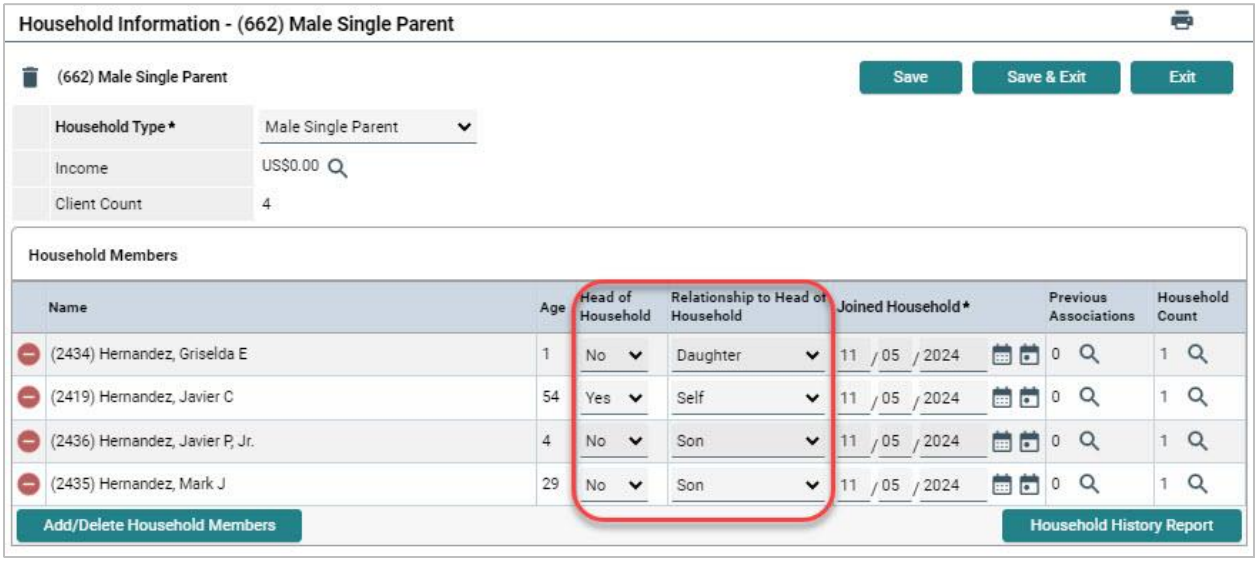
Edit household members

As information is known about household members, their client record is updated.

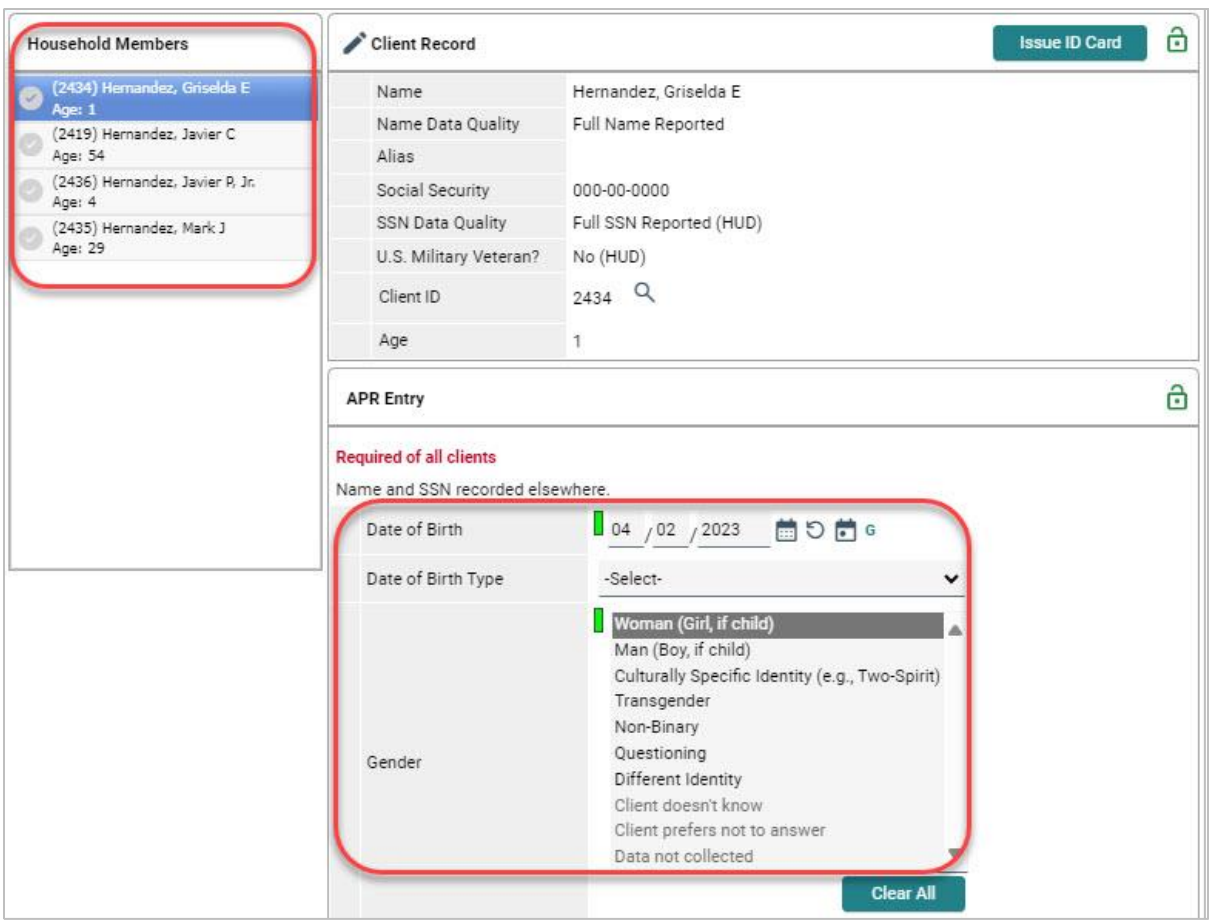
1. Search for and open any of the household member's records. Household member records are linked together, so all household members can be accessed when another member's record is opened.
2. Click the **Households** tab.
3. To edit the household member records, click **Manage Household**.



4. At the top of the record, complete the **Head of Household** and **Relationship to Head of Household** fields for each member.



5. Select each member from the Household Members section and complete the required fields, indicated by a green rectangle.



6. When you're finished with all household member client records, click **Save & Exit**.

    a. When required fields have been completed, a checkmark is displayed next to the household member record.

NOTE – The client record can include many fields. Check with your administrator for guidance on your local data entry requirements.

ROI tab

The Release of Information (ROI) tab is a place to add information about consent to share information with other entities. The Head of Household can sign one ROI for all members.

1. From the Clients module, search for and open the client record.

2. Click the **ROI** tab.

3. Click **Add Release of Information**.

4. If the client is a member of a household, select the option next to their name to include them and all household members, otherwise, select the clients for whom you want to add the ROI.

5. In the Release Granted field, select **Yes** or **No**.

6. Adjust the Start Date if needed and add an End Date.

7. Complete the remaining fields if necessary.

8. When you're finished, click **Save Release of Information**.

9. The ROI is added to the client record and household members, if applicable.

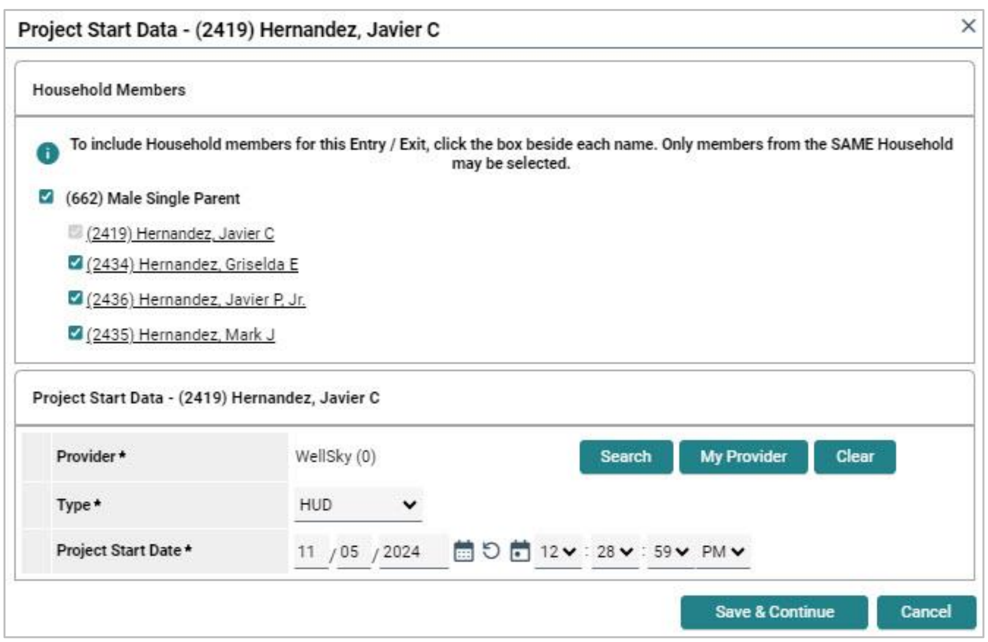
10. To attach a ROI, click **Attachments** and follow the instructions to upload the ROI.

11. Click **Exit**.

Entry / Exit tab

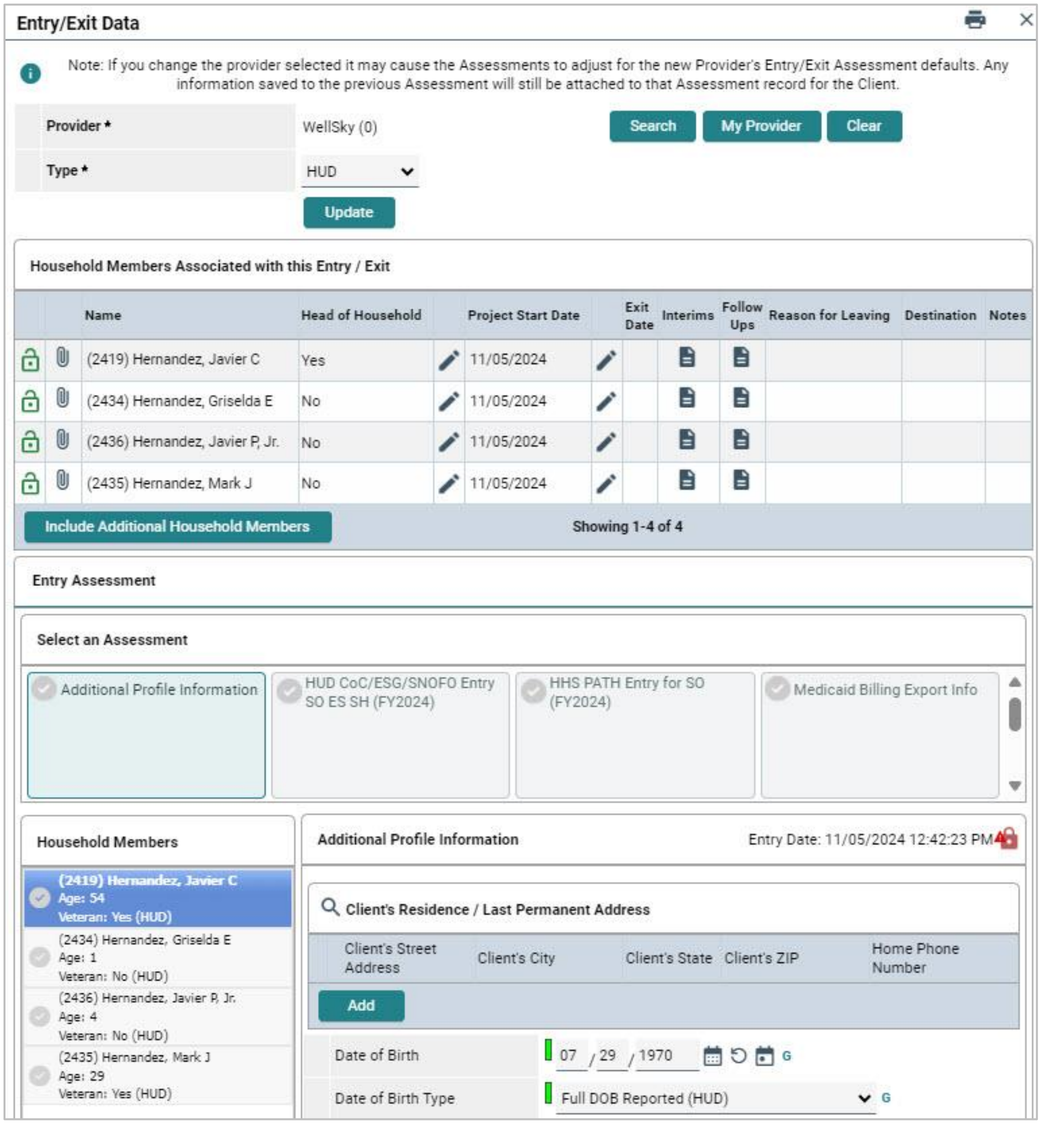
The Entry / Exit tab is used to enroll a client into an HMIS project and to identify when a client left the program.

1. From the Clients module, search for and open the client record.
2. Select the **Entry / Exit** tab.
3. Click **Add Entry / Exit**.
4. If the client is a member of a household, select the members for whom you want to add the Entry / Exit data. If the client is the Head of Household, select them to include all household members.
5. Search for and select a different Provider if needed.
6. Select the entry **Type** and adjust the Project Start Date if needed.
7. Click **Save & Continue**.



8. An Entry Assessment is displayed for the client and household members, if applicable. Complete all questions; these are important for reporting purposes.
9. When you're finished with each assessment, click **Verify and Save Data.**

10. When all assessments have been completed, click **Save & Exit**.

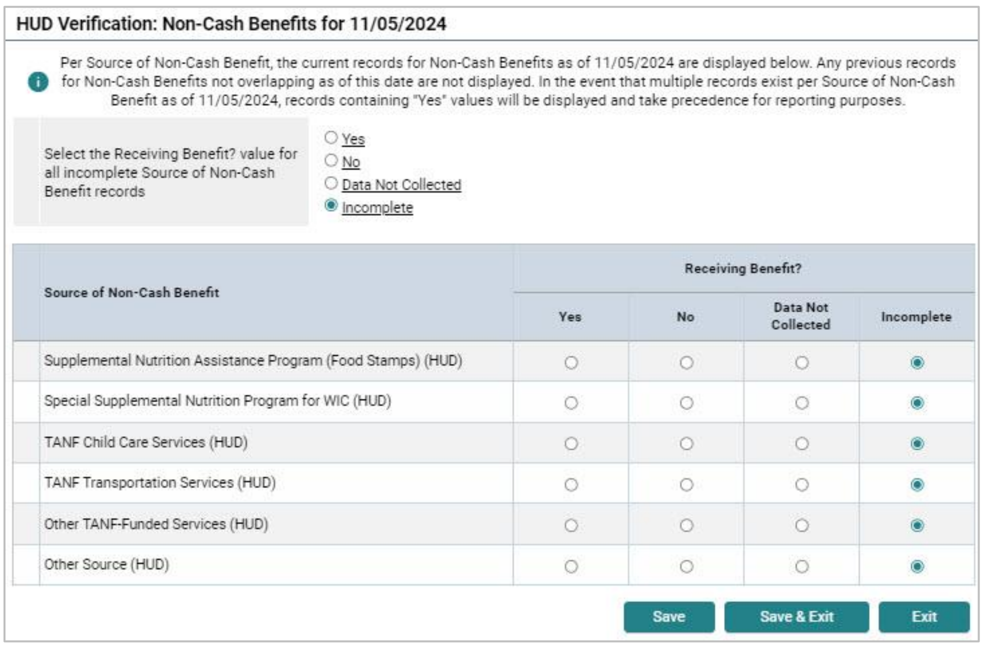


11. If HUD funds the project, HUD requires verification of the following: YES and NON-YES Monthly Income, Non-Cash Benefits, Health Insurance and Disabilities. Verification must be completed during Entry, Updates (Interims), Annual Assessments, Exits and Follow-Ups. This can be done in two ways:

    a. Update individually by clicking **Add** in each section and manually entering the information for each sub-assessment and fields within those sub-assessments.

b. Click the **HUD Verification** link.

i. The HUD Verification link displays a worksheet where you can select options.



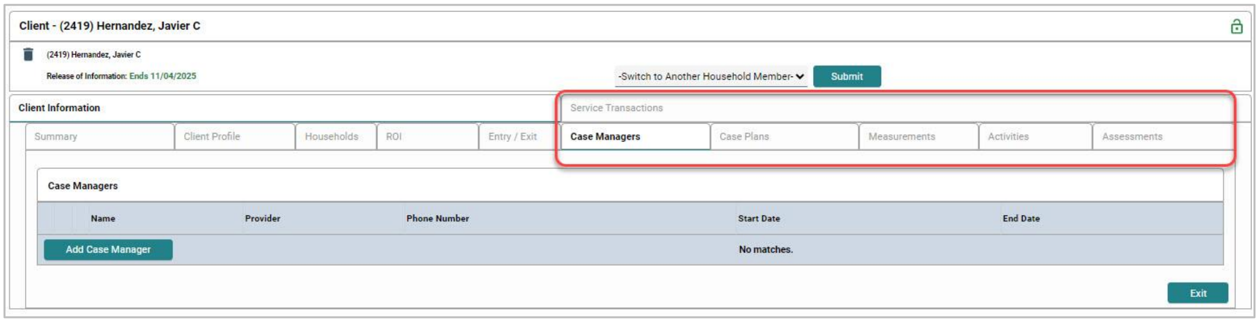
12. When finished, click **Save & Exit**.

Service Transactions tab

The Service Transactions tab includes several sub-tabs.

- **Case Managers:** Lists the client's Case Manager(s)
- **Case Plans:** Comprehensive case plans, including goals, case notes, action steps, and identified services
- **Measurements:** Measurement figures are basic scoring questions that extract data from the measurement tool.
- **Activities:** Lists the current and past activities for the client, including activities in which the client is enrolled, wait listed, dropped, pending, or denied.

- **Assessments:** Questionnaires about a variety of topics. HUD and other Federal organizations may require certain assessments.



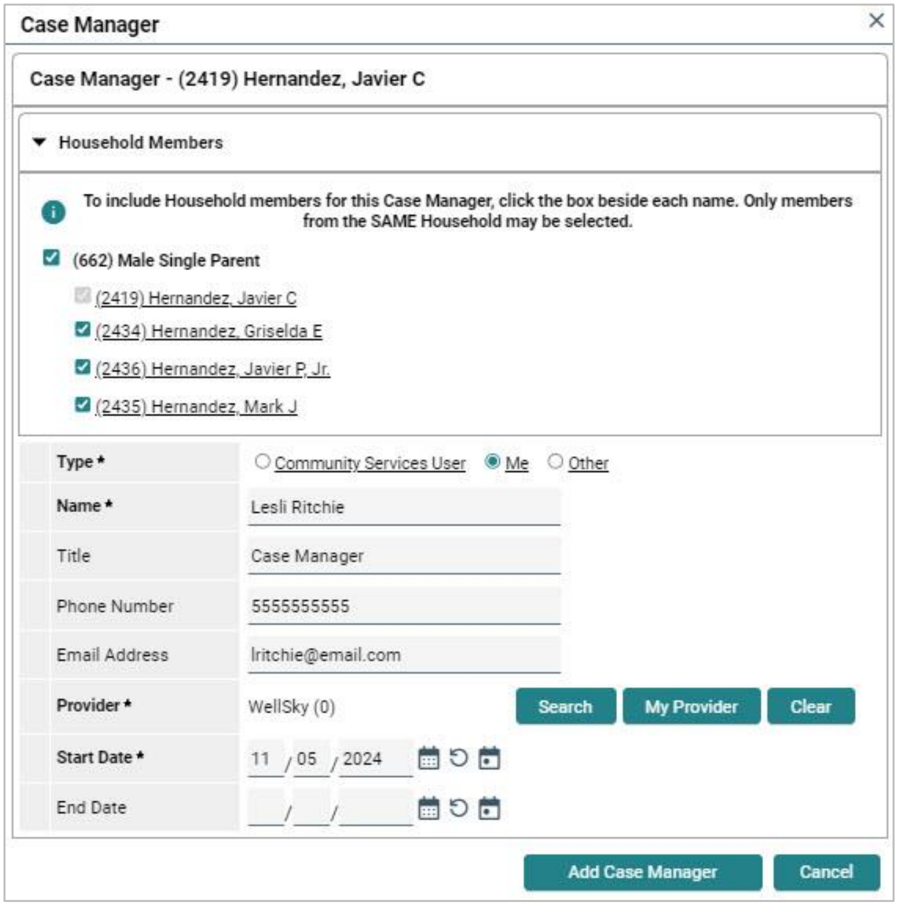
Case Manager tab

The Case Manager tab in the client record tracks the client's case managers.

Add a case manager

1. From the Clients module, search for and open the client record.
2. Select the **Case Managers** tab.
3. Click **Add Case Manager**.
4. If the client is a member of a household, select the members who will be assigned to the case manager.
5. Select the **Type**.
    a. **Community Services User:** Displays a list of users for the selected provider.
    b. **Me:** The user who is entering the information.
    c. **Other:** Allows manual entry of a case manager.
6. Edit the provider if needed.
7. Adjust the Start Date if needed and enter an End Date if known.

8. Click **Add Case Manager**.

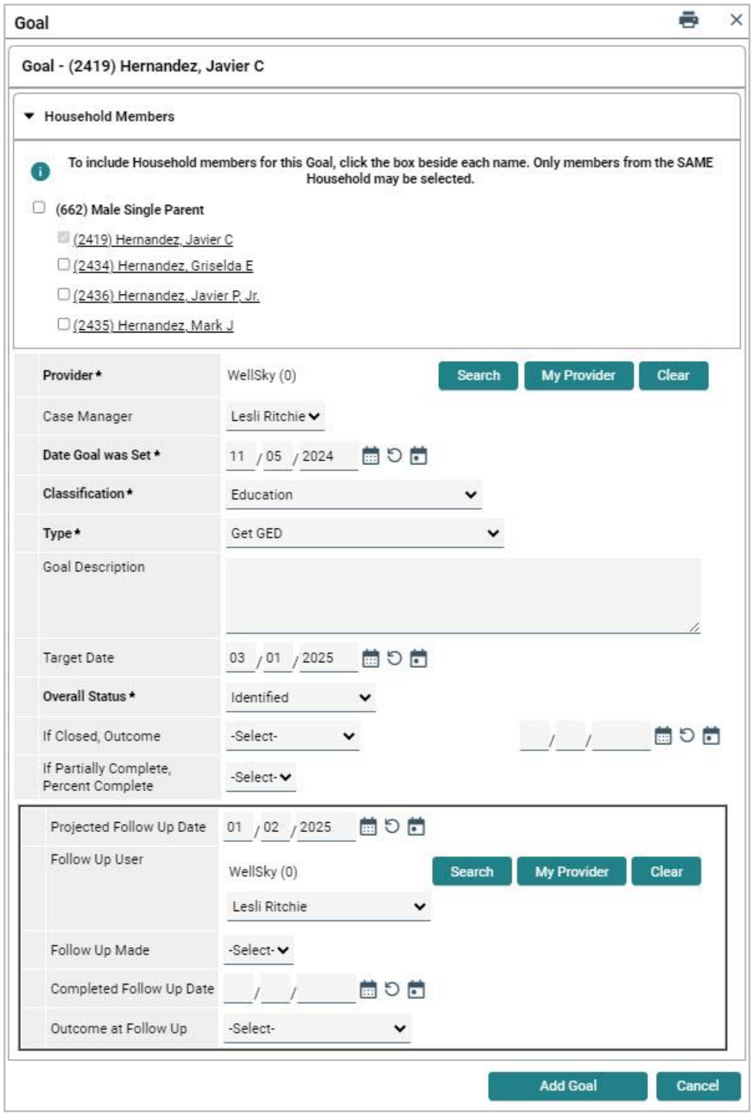


Case Plans tab

The Case Plans tab is where Goals, Action Steps and Case Notes are kept. This information helps clients to plan self-sufficiency and track outcomes.

1. From the Clients module, search for and open the client record.
2. Select the **Case Plans** tab.
3. Click **Add Goal**.

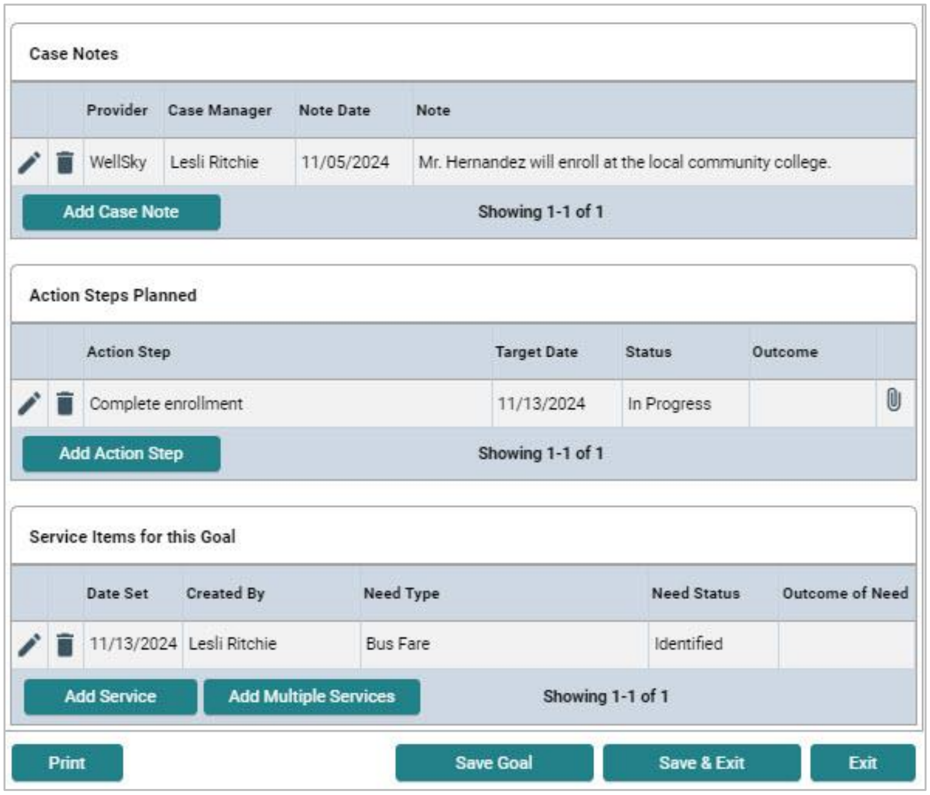
4. If the client is a member of a household, select the members to whom the goal applies.
5. Edit the provider if needed and select a Case Manager.
6. Edit the date the goal was set, as necessary.
7. Select a Classification and a Type and add a Goal Description if needed.
8. The Target Date is optional. Select a date if needed.
9. In the Overall Status field, select the appropriate response.
10. If follow up is needed, select a Projected Follow Up Date. This creates a reminder on the case manager’s Home page.
11. Click **Add Goal.**



a. Additional sections are displayed where you can add case notes, action steps, and identify services that are necessary to meet the goal. Complete these sections as needed.

NOTE – For more information on adding services, see the *Service Transactions Workflow* document on the WellSky Client Resource Center.

12. To print a copy of the goal, click **Print**, otherwise, click **Save & Exit** to close the Goal window.



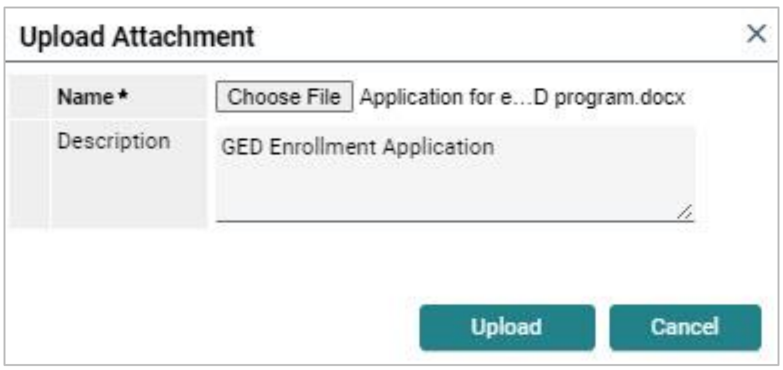
Add attachments to a case plan

Electronic files up to 10MB can be attached to a case plan. The following file types are allowed:

- PNG
- JPG
- JPEG
- BMP
- GIF
- DOC
- DOCX
- XLS
- XLSX
- PDF
- PPT
- PPTX
- RTF
- TXT

To add attachments

1. From the Clients module, search for and open the client record.
2. Select the **Case Plans** tab.
3. In the Case Plans File Attachments section, click **Add New File Attachment**.
4. Click **Choose File** and navigate to the file you want to attach.
5. Add a Description. Although this is an optional field, it's helpful so you can easily see what the attachment is in the Case Plans File Attachments list.
6. Click **Upload**.



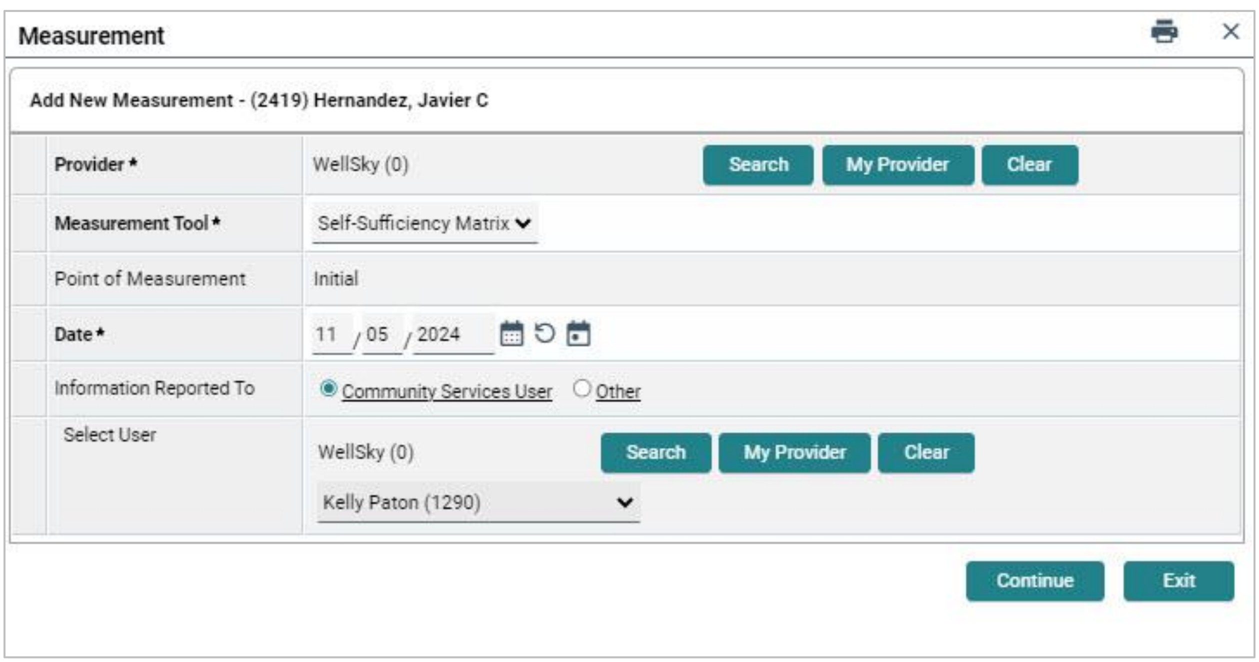
7. The file is added to the Case Plans File Attachments section.
   a. To edit the description, click **Edit**.
   b. To delete the attachment, click **Delete**.
   c. To view the attachment, click **View**.

8. Click **Exit**.

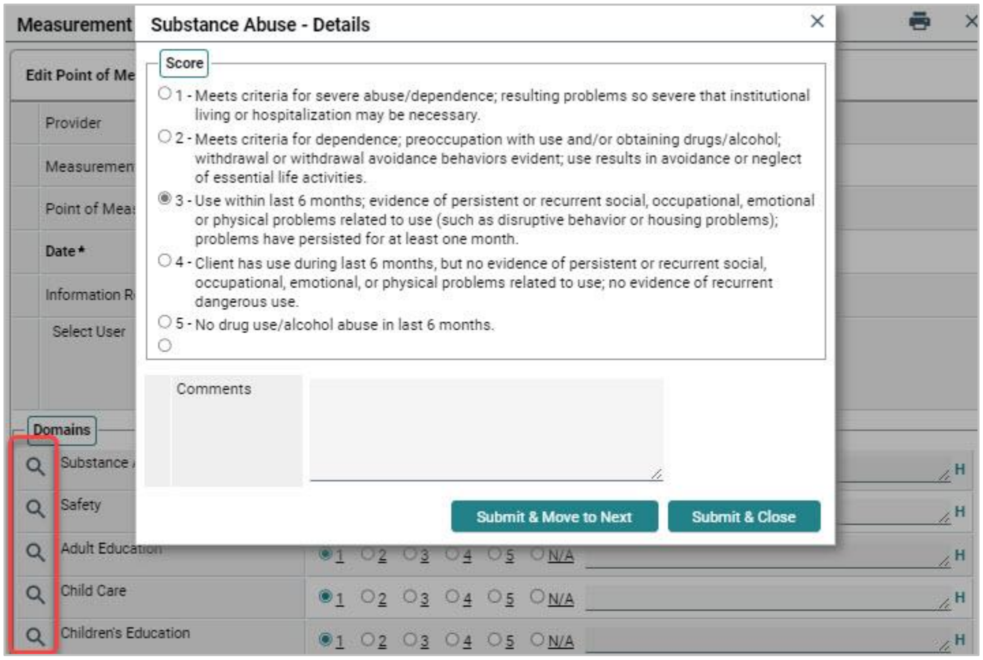
Measurements tab

Three measurements are available, depending on the provider configuration. They are the Self-Sufficiency Matrix, SPDAT, and the F-SPDAT.

1. From the Clients module, search for and open the client record.
2. Select the **Measurements** tab.
3. Click **Add New Measurement**.
4. Edit the provider if needed.
5. Select the Measurement Tool.
6. Adjust the date if needed.
7. In the Information Reported To field, select **Community Services** or **Other**.
    a. When Community Services is selected, you can identify a Community Services user.
    b. When Other is selected, you can add the name of a person who is not a Community Services user.
8. Click **Continue**.



9. Select a response for each question. To view response definitions, click the **Magnifying Glass** icon next to each Domain.



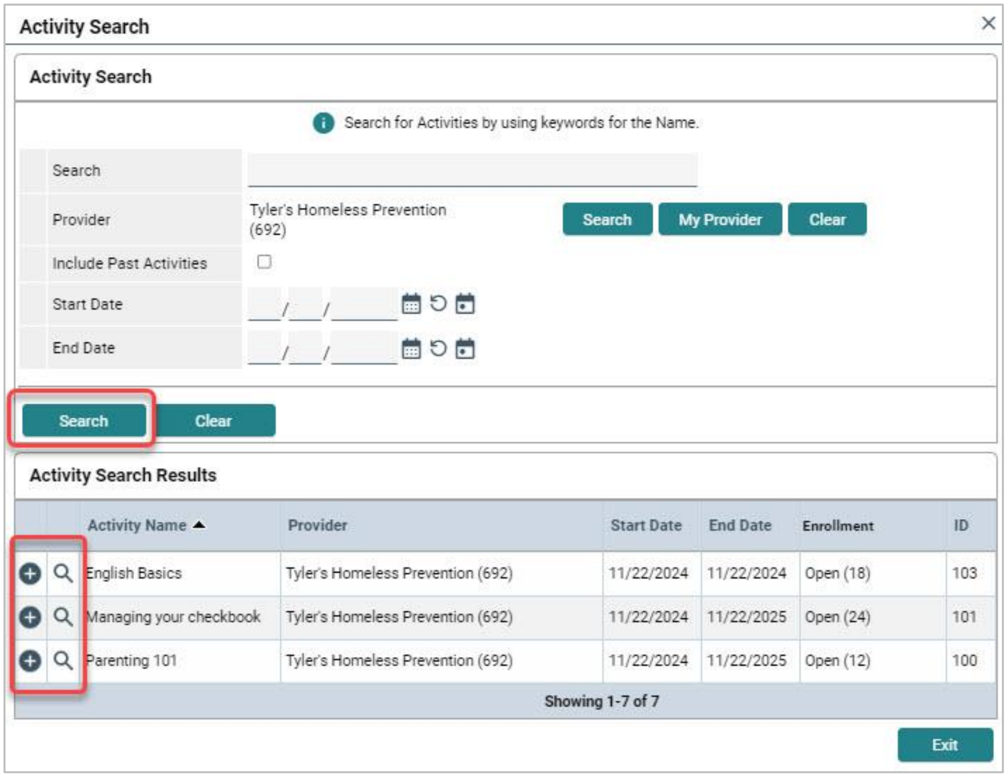
> **TIP -** For more information, see the *Self-Sufficiency Outcomes Matrix Workflow* on the WellSky Client Resource Center.

10. When you're finished, click **Save & Exit.**

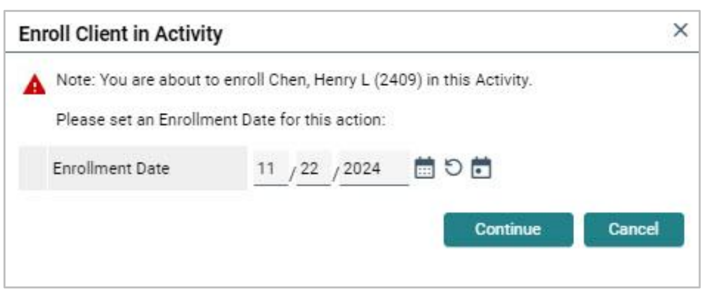
Activities tab

Activities can be community education, field trips, and meetings, among other events. From this tab, you can enroll a client in an activity, add them to a wait list, and record dropped, pending, and denied activities.

1. From the Clients module, search for and open the client record.
2. From the Service Transactions tab, click the **Activities** tab.
3. To add a client activity, click **Enroll in Activity**.
4. Identify the provider and add a date range, if needed.
5. Click **Search**.
6. Click **View** to display details, including dates, times, and locations.
7. Click **Add** to enroll the client in the activity.



8. A message is displayed. Enter the Enrollment Date and click **Continue**.



9. A validation message is displayed that the client was enrolled. Click **OK**.

10. Continue enrolling the client in additional activities or click **Exit.**

11. A list of activities is displayed on the client record. For each activity, several icons are displayed:

    a. **Open**: The Open icon looks like a lock and when clicked, displays Visibility and Deny Groups. These settings identify who has access to the record.

    b. **View**: The View icon looks like a magnifying glass. When clicked, it displays activity details such as the time and place, location, and teacher.

c. **Move to Wait List**: The Move to Wait List icon is a folder with a green marking. Click this to move the activity to a waitlist. The activity will be displayed in the Wait Listed Activities section.

d. **Move to Drop List**: The Move to Drop List icon is a folder with a red marking. Click this when a client drops an activity where it will be displayed in the Dropped Activities section.

e. **Delete Enrollment**: This icon looks like a trash can and is used to delete the client's enrollment in an activity. It should only be used when an activity enrollment has been created by mistake.

Assessments tab

The Assessments tab allows you to add, edit, delete, and view a history of the client's assessments.

1. From the Clients module, search for and open the client record.
2. Select the **Assessments** tab.
3. In the Select an Assessment field, select the assessment and click **Submit**.

4. Complete the assessment and click **Save** when you’re finished.

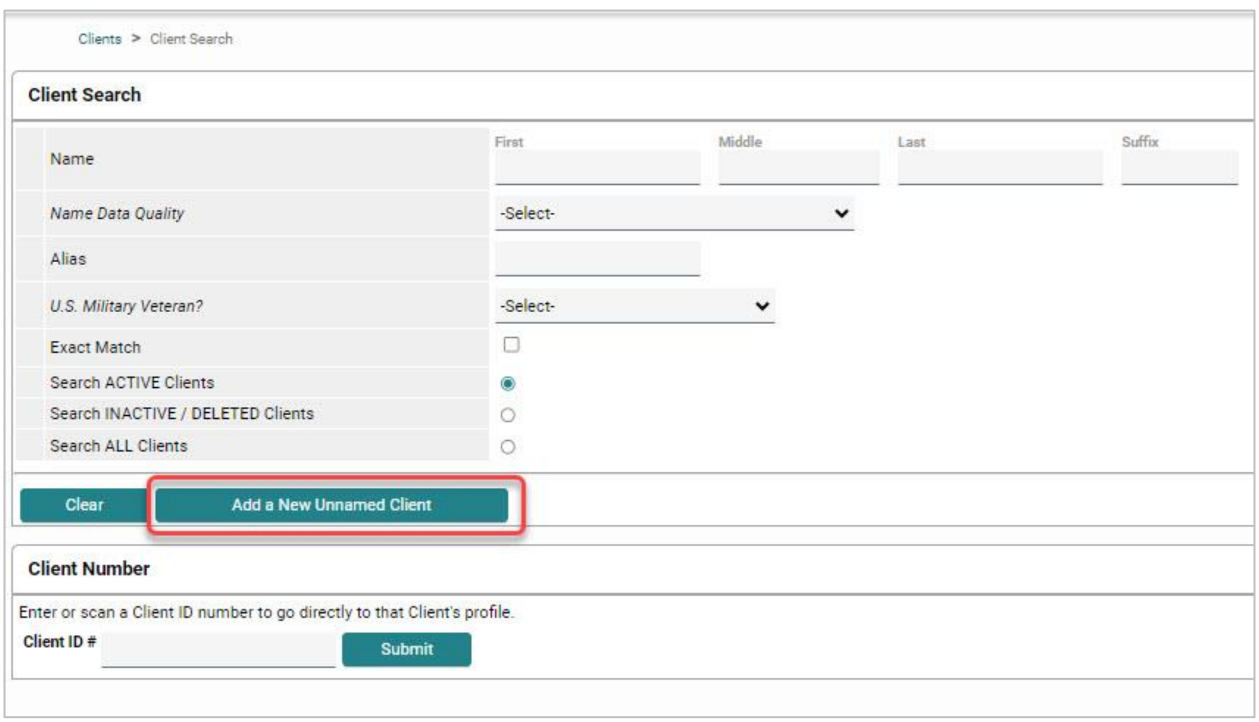
Create an anonymous client record

Community Services allows you to add anonymous clients. However, best practices do not recommend this because it can result in missing or duplicate data. For example, a client may initially come into the program anonymously but later decides to disclose their name and other identifying information. This creates two records for the client: one is anonymous, and the other includes their identifying information.

Create an unnamed client record

Community Services allows you to add an Unnamed Client. The Allow User to Manage only Unnamed Clients option must be enabled for a user to add anonymous clients. This setting is in **Admin > User Admin > Settings & Special Permissions > Allow User to Manage only Unnamed Clients**. When this option is enabled, the user can add ONLY unnamed clients.

1. Log into Community Services.
2. Click **Clients** from the Side Navigation Panel.
3. Click **Add a New Unnamed Client**.



4. Follow the steps in Create a named client record, beginning with step 2.

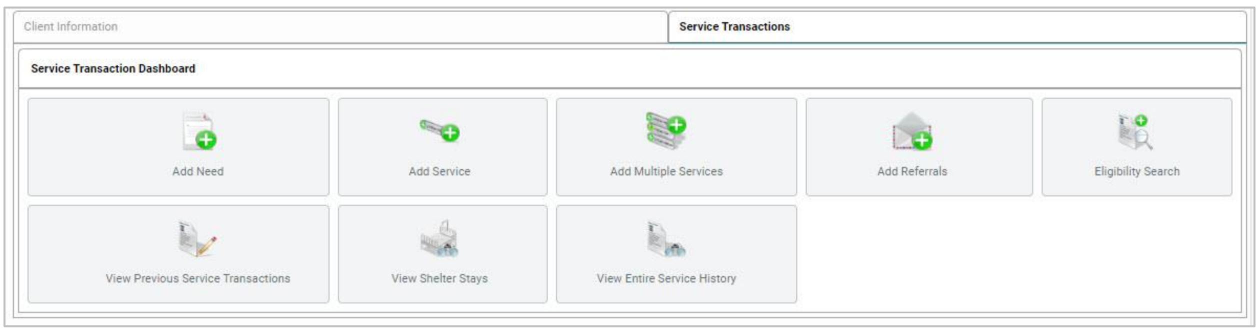
Service transactions

Service transactions include identifying a client's need, selecting a service to meet the need, and optionally, referring them for services.

In Community Services, clients must have a need added before adding a service and/or a referral. When adding a need, you can

Service Transactions Dashboard

In a client record, the Service Transactions dashboard allows you to easily add needs, services, referrals, and see the client's service history.



Here are some tips to keep in mind as you're working with needs, services, and referrals.

- A need must be created in the client record before services or referrals can be added.
- Community Services uses the Taxonomy of Human Services (THS), an indexing system of Health and Social Services.
- A taxonomy term is equal to a need term and a service term. They should all be the same.

EXAMPLE

The client has a *need* for emergency shelter. The *service* provided is emergency shelter. If a *referral* is made, the referral is made to an emergency shelter.

Entire Service History tab

As you're adding needs, services, and referrals, you can either follow the guided steps or you can work from the Entire Service History tab.

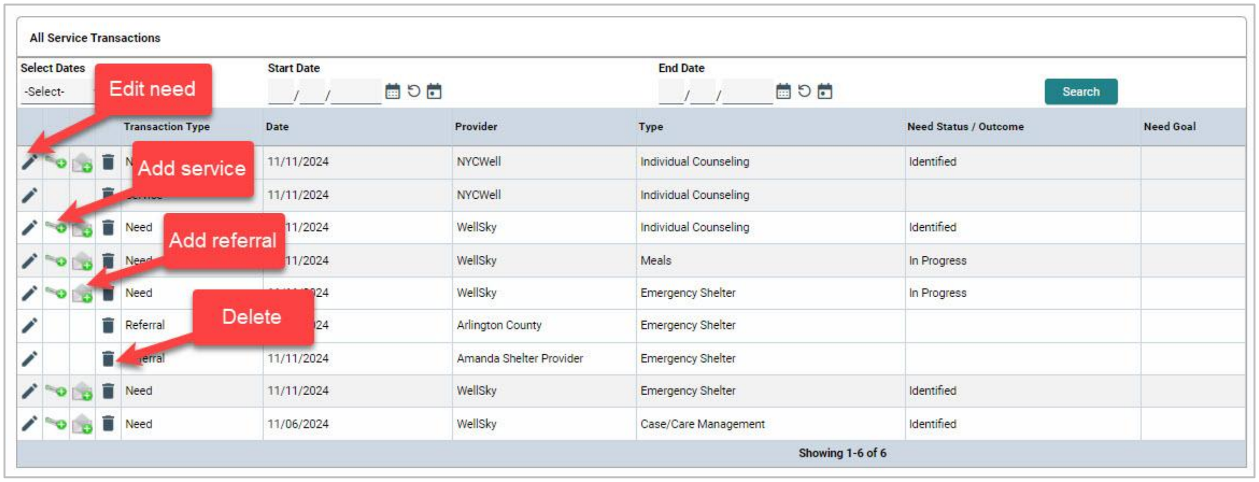
1. Search for and open the client record.

2. Click the **Service Transactions** tab.

3. Select **View Entire Service History**.

4. Use the date filters to narrow the list, if needed.

5. Click the icon on the left to edit the need, add a service, add a referral, or delete the item.



Add a need

The first step in providing services to a client is to identify their needs. You can do this by adding the need manually, or by creating a referral which can automatically create the need.

1. From the Clients module, search for and open the client record.

2. Select the **Service Transactions** tab.

3. Click **Add Need**.

4. If the client is a member of a household, select the members who have the same need.

    a. To select the entire household, select the head of household.

5. In the Need Information section, update the provider, if required.

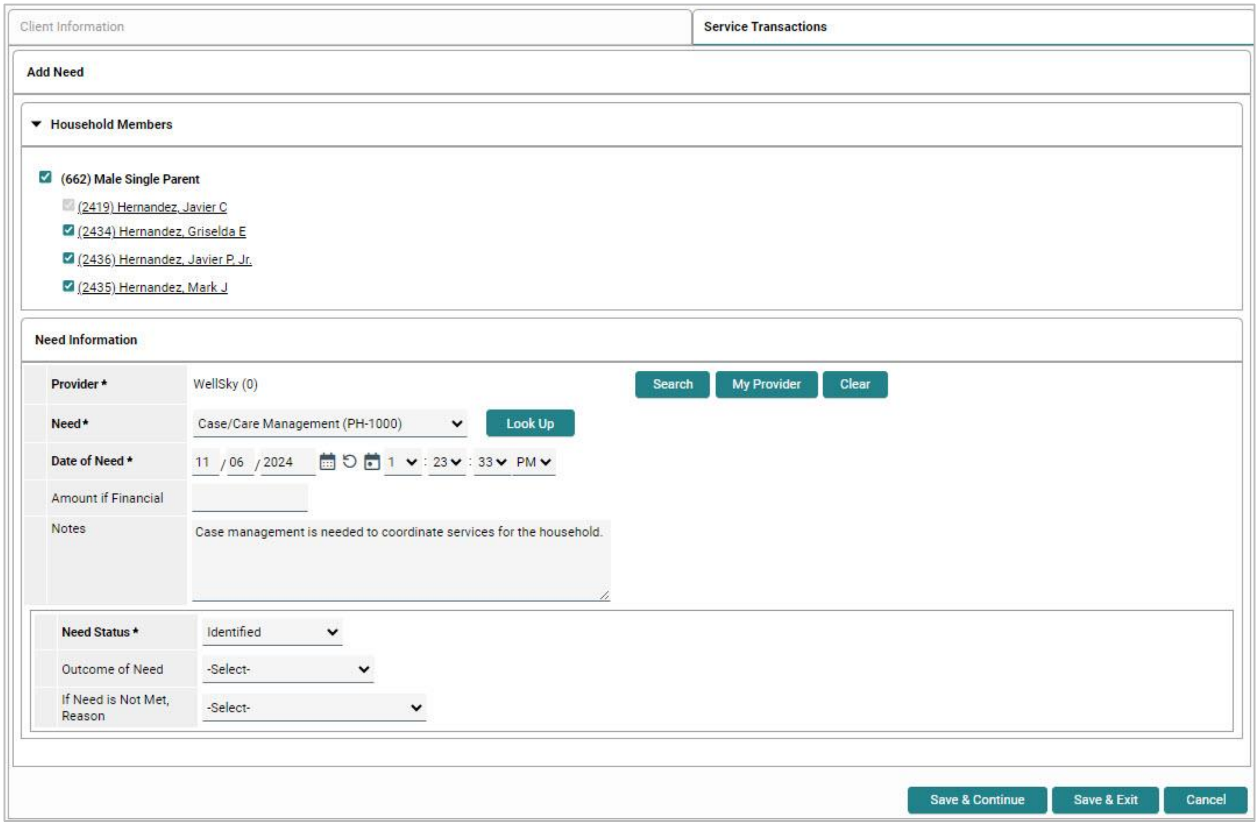
6. Select the Need or click **Look Up** to search for it.

7. Edit the Date of Need, as necessary.

8. If the need is financial, enter the dollar amount in the Amount if Financial field. For example, bus fare may be a financial need, so $5.00 would be entered to cover the bus fare.

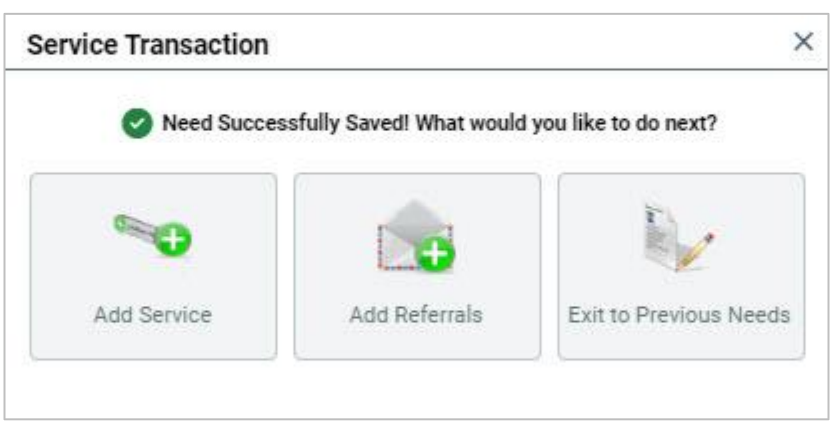
9. The Need Status defaults to Identified when the need is first added. Edit the field, as necessary.

10. Click **Save & Continue**.



11. A confirmation message is displayed. Click the appropriate option. In this example, **Add Service** is selected.

NOTE – If there is only a need, click **Exit to Previous Needs** to view the need history.



Add a service

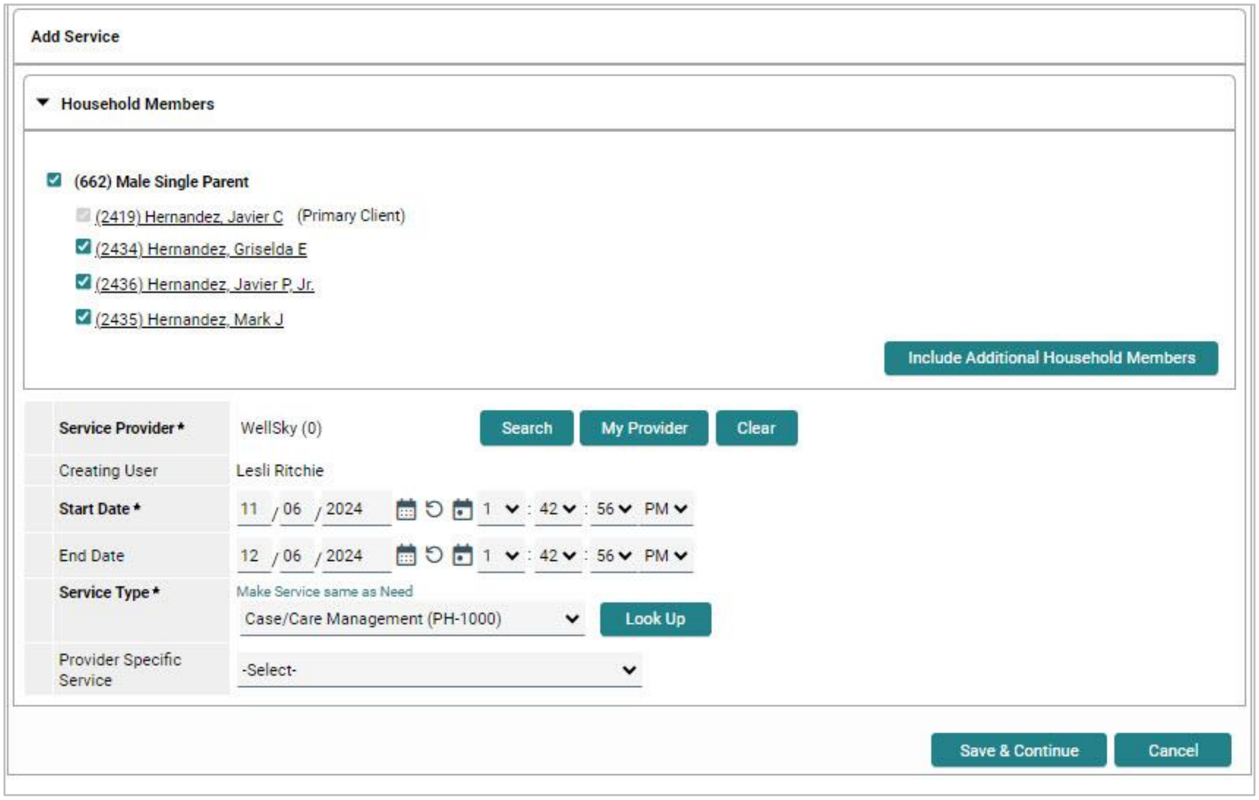
After a need has been identified, a service can be added, or a referral made to another provider to address the need.

1. Follow the steps in Add a need.
2. Select **Add Service**.

TIP – If you're not adding a service right after the need is added, you can go to the Service Services tab and click **Add Service**.

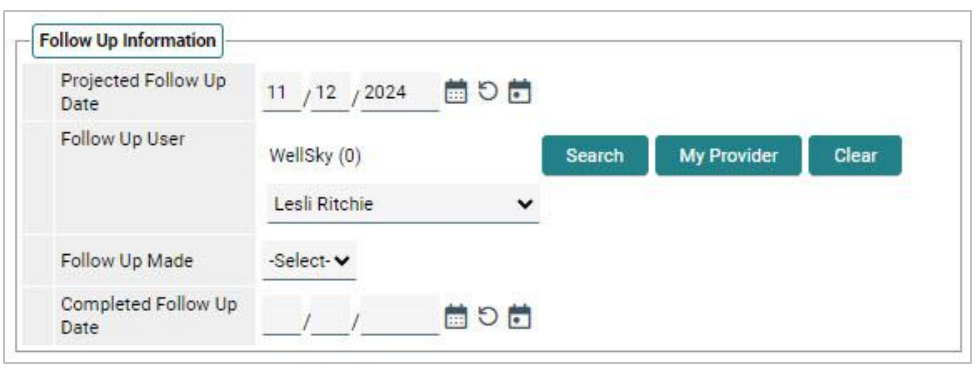
3. If the client is a member of a household, select the members who require the same service.
    a. To select the entire household, select the head of household.
4. Update the provider, as needed.
    a. Select the Service Type or click **Look Up** to search. The service must be the same as the need.
5. Edit the dates, as necessary.
6. In the Provider Specific Service field, select the provider's service. This is an optional field, and not all providers have services that are named other than the standard naming convention.

7. Click **Save & Continue.**



8. Additional fields are displayed. Check with your administrator for the information your organization requires.

9. If follow up is required, complete the Follow Up Information section. When you identify a Follow Up User, the user will see the task on their Dashboard and can track its progress.



10. Click **Save & Continue**.

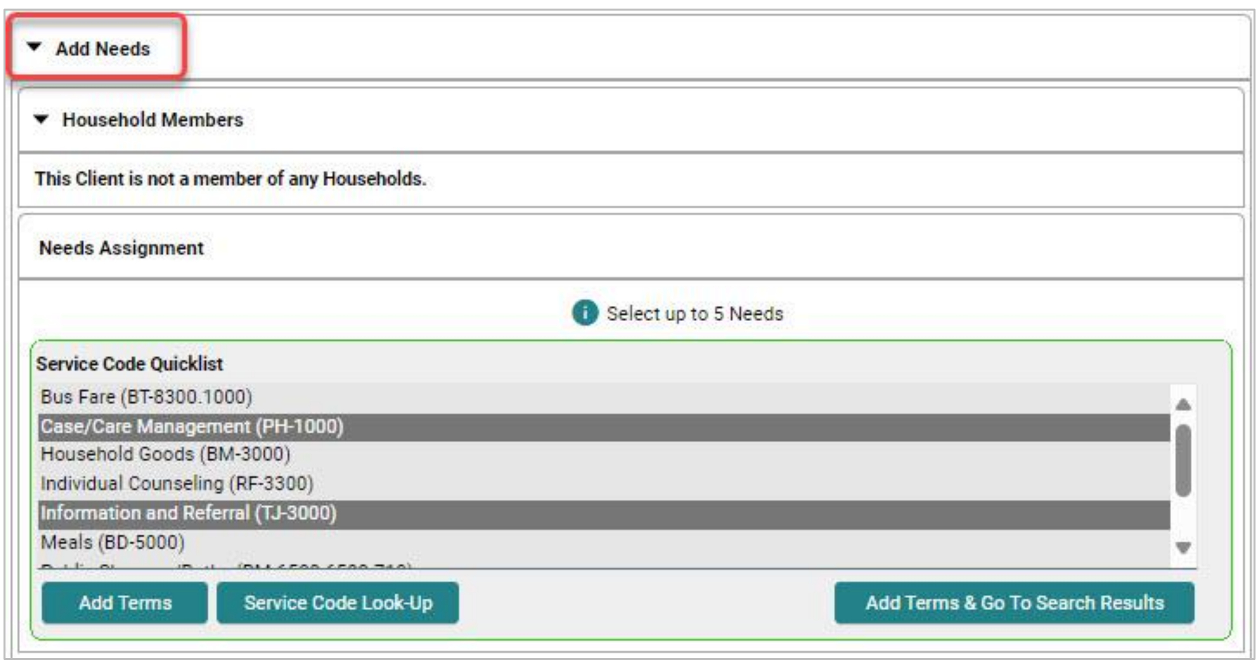
Add a referral and a need

A referral can be added based on a need that has been documented in Community Services. For additional information, see the *Referrals Workflow* located on the WellSky Client Resource Center.

NOTE – For steps on creating a need, see Add a need.

1. Open the client record and click the **Service Transactions** tab.
2. Select **Add Referrals**.
3. If the client is a member of a household, select the members to include in the referral.
    a. To select the entire household, select the head of household.
4. Expand the Add Needs section and in the Service Code Quicklist, select up to five needs. Press the **Ctrl** key to select more than one need.
5. Click **Add Terms** or **Add Terms & Go To Search Results**.

TIP – If a service is not listed on the Service Code Quicklist, click **Service Code Look-Up** to locate the Service Code.



TIP – If you need to narrow the provider search, such as to locate providers in a particular city or population, use the **Refine Search with Service Terms or Target Populations** or the **Refine Provider Search Criteria** sections.

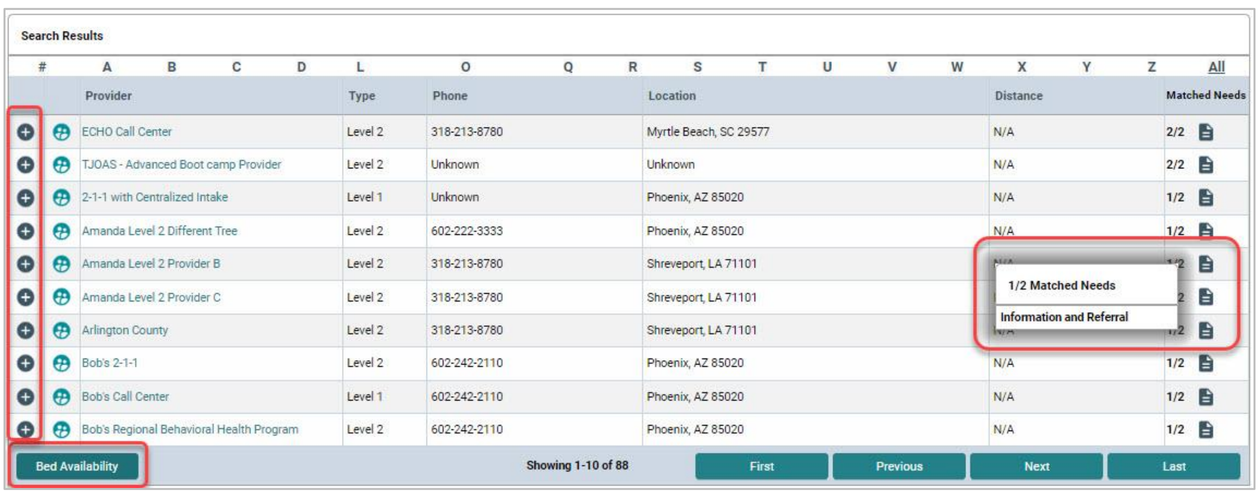
If there is not an exact provider match, the search will display results of providers that offer a more specific service for the need.

6. A list of providers who offer services to meet the client's needs is displayed. For shelter providers, click **Bed Availability** to display a list of provider unit lists and available beds.

    a. To view additional provider information, click the provider name to display hours, services offered, and contact information.

    b. If more than one need was identified in the Matched Needs column, point to the document icon to display the needs for which the provider offers services.

7. Select one or more providers by clicking **Add** next to the provider name.



8. The provider is added to the Referrals section at the bottom of the screen.

TIP – You can select many providers for the referral.

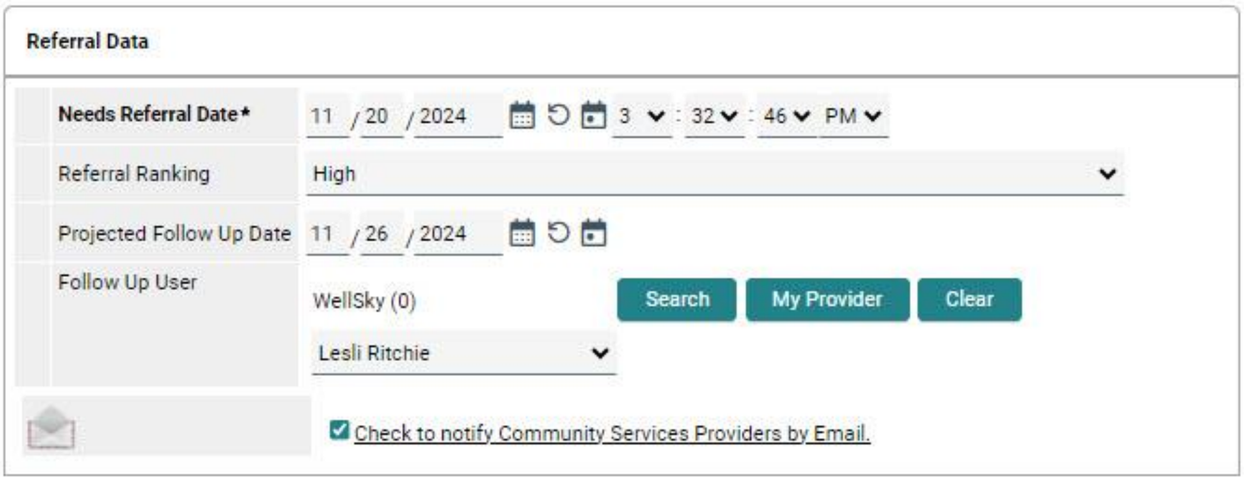
9. Complete the Referral Data section.

    a. Edit the Needs Referral Date if necessary.

    b. Optional: Select a Referral Ranking. This indicates the level of urgency for the referral.

c. Optional: Add a Projected Follow Up Date to identify a date to follow up on the referral. If a follow up date is selected, select a Follow Up provider and user. A reminder will be added to the user's Follow Up List on the Dashboard.

d. Optional: Select **Check to notify Community Services Providers by Email** to send an email to the referral provider.



10. Click **Save ALL** at the bottom of the page.

Add a need first and then add a referral

See Add a need.

Version Control

Date	Changes
3/21/25	Updated to version #CS5.15.10.