



Community Services

Clients Data Entry Workflow

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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.

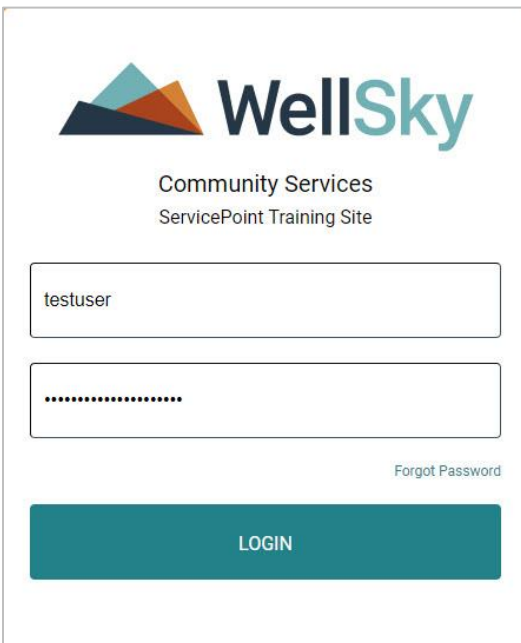
When a client record is added, you can add service referrals for other organizations who use Community Services.

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

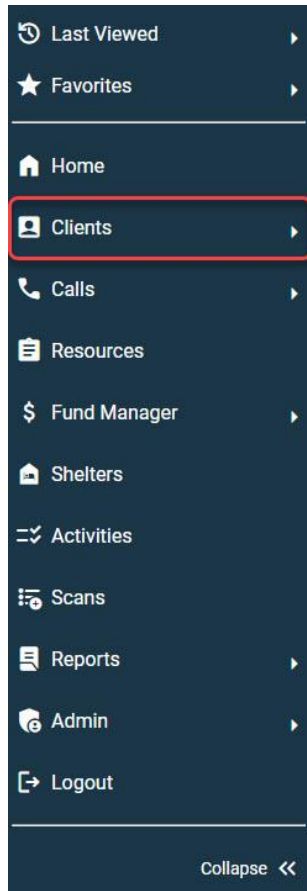
It's important to always search for an existing client record before adding a new one. This ensures data integrity and prevents duplicate records. Each client should have only one record so that their complete profile and history is accurately maintained.

1. Log onto Community Services.

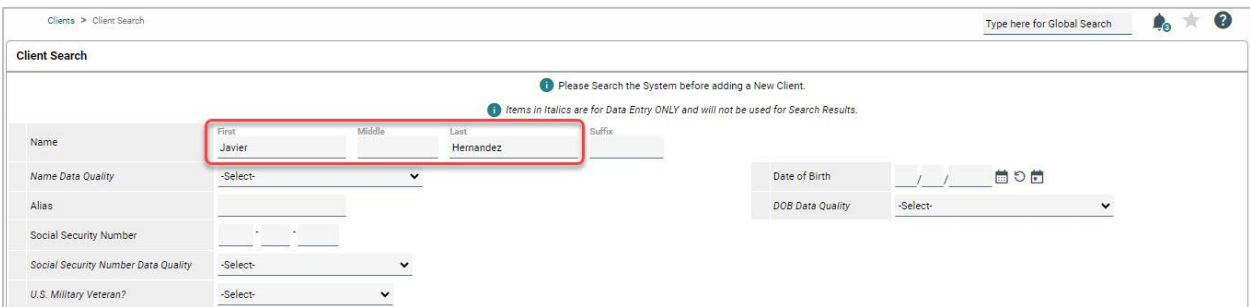


The image shows a login screen for the WellSky Community Services ServicePoint Training Site. At the top is the WellSky logo. Below it, the text "Community Services" and "ServicePoint Training Site" is displayed. There are two input fields: the first contains the text "testuser", and the second contains a series of dots representing a password. To the right of the password field is a link that says "Forgot Password". At the bottom is a large teal button with the word "LOGIN" in white capital letters.

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

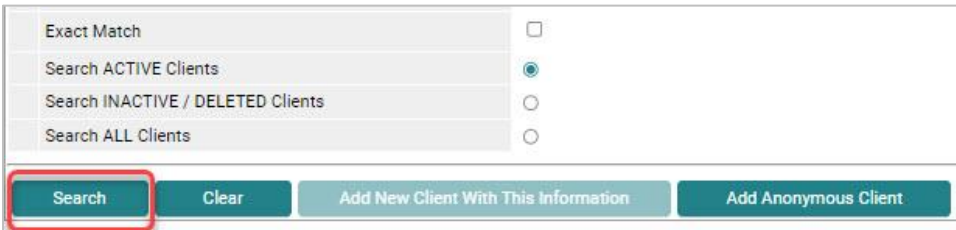


3. Search for the client using one or more search terms such as their first and last name, Social Security Number, or Date of Birth.



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

5. Click **Search**.



Search filter options:

- Exact Match ☐
- Search ACTIVE Clients ☒
- Search INACTIVE / DELETED Clients ☐
- Search ALL Clients ☐

Action buttons:

- Search** (highlighted with a red box)
- Clear
- Add New Client With This Information
- Add Anonymous Client

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.

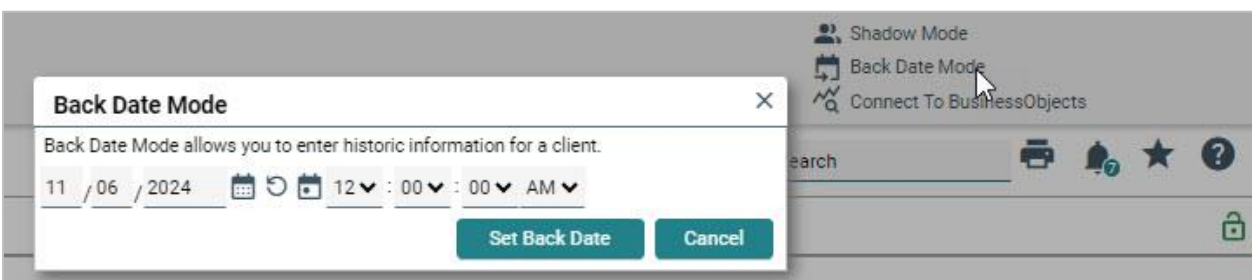
Client Results									
	ID	Name ▲	Social Security Number	Date of Birth	Alias	Gender	Banned	Household Count	
	2418	Hernandez, Javier P, Jr.	000-00-0000	03/09/1958	Joe			0	
Showing 1-1 of 1									

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.

- To use the Back Date Mode, click **Back Date Mode** in the upper right corner of the screen.
- Change the date and click **Set Back Date**.



Back Date Mode

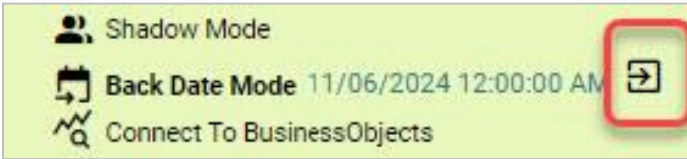
Back Date Mode allows you to enter historic information for a client.

11 / 06 / 2024   12 : 00 : 00 AM 

Set Back Date **Cancel**

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

- 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.

- 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](#).

- 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.

Add New Client Information

You are about to add a New Client to the system (Be sure to look through all the possible matches before continuing this process).

Would you like to:



Add Client ONLY



Add Client and Add NEW Household



Add Client and SEARCH Households

Cancel

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 - (2419) Hernandez, Javier


(2419) Hernandez, Javier
 Release of Information: None

Client Information

Summary

Client Profile

Households

ROI

Entry / Exit

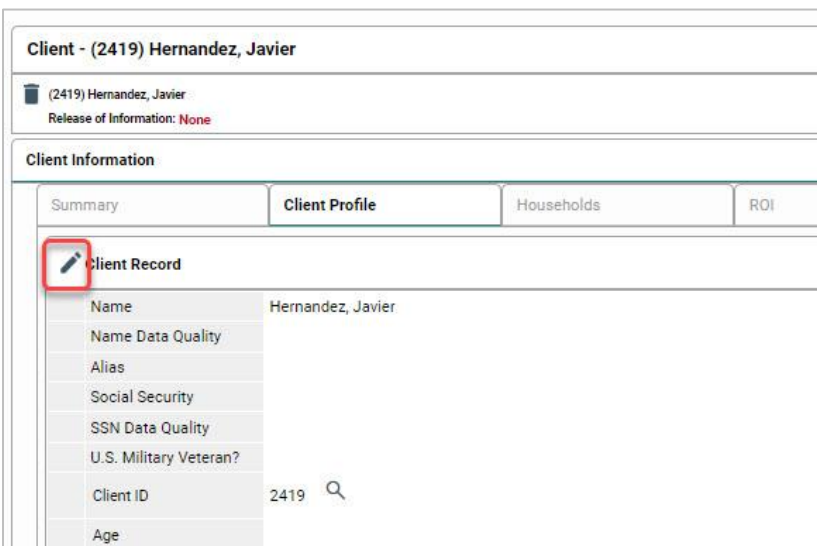
Added to the system 10/25/2024 01:21 PM

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.



Client - (2419) Hernandez, Javier

(2419) Hernandez, Javier
Release of Information: None

Client Information

Summary Client Profile Households ROI

Client Record

Name Hernandez, Javier

Name Data Quality

Alias

Social Security

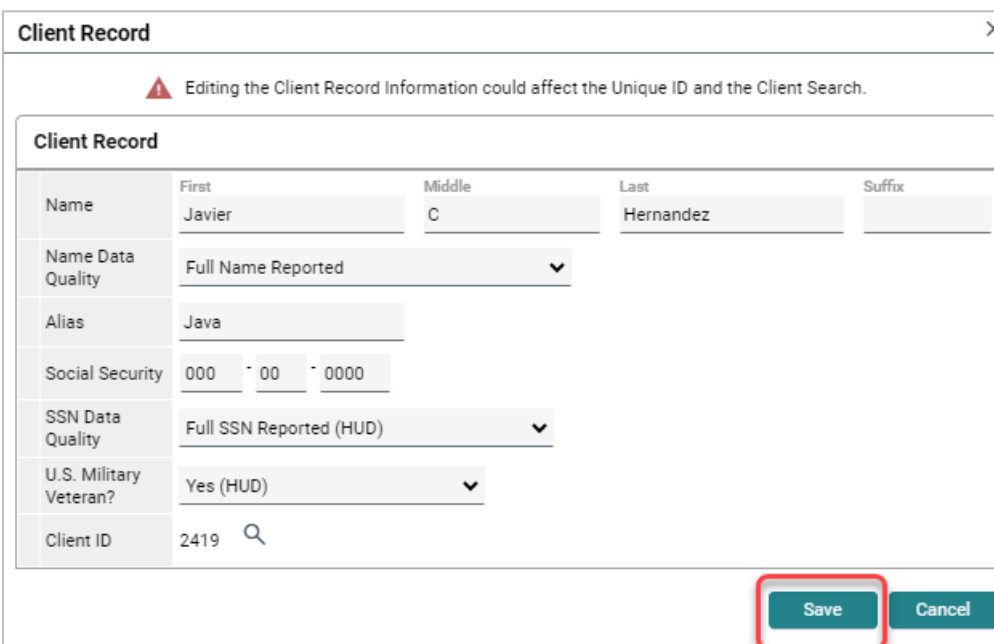
SSN Data Quality

U.S. Military Veteran?

Client ID 2419

Age

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



Client Record

⚠ Editing the Client Record Information could affect the Unique ID and the Client Search.

Client Record

Name	First	Middle	Last	Suffix
	Javier	C	Hernandez	

Name Data Quality Full Name Reported

Alias Java

Social Security 000 - 00 - 0000

SSN Data Quality Full SSN Reported (HUD)

U.S. Military Veteran? Yes (HUD)

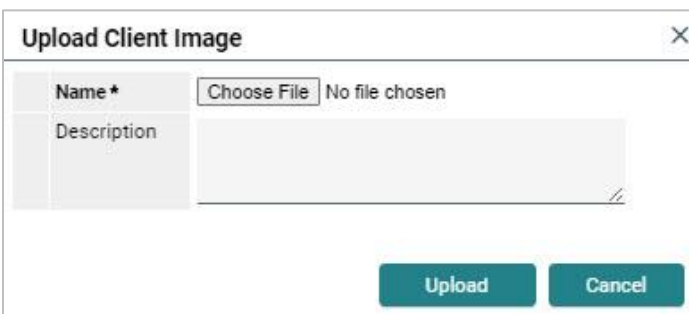
Client ID 2419

Save Cancel

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**.

A dialog box titled "Upload Client Image" with a close button (X) in the top right corner. The dialog contains a table with two rows: "Name *" and "Description". The "Name *" row has a "Choose File" button and the text "No file chosen". The "Description" row has a large text input area. At the bottom of the dialog are two teal buttons: "Upload" and "Cancel".

Upload Client Image	
Name *	Choose File No file chosen
Description	
Upload Cancel	

Print Client ID cards

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

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

Issue ID Card



Change
Clear

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

ID Card Print Options

Paper Size

☐ ID-1
☒ Letter

Card Orientation

1

Issuer Name

☐ ServicePoint Training Site
☒ WellSky
☐ None

Image to Display

☐ SERVICEpoint
Connecting Your Community.
☒ 
☐ None

Include Client Photo, if available
☒

Include Date Of Birth
☐

Include Signature Line (ID-1 paper size required)
☐

Generate ID Cards
Cancel

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.



WellSky
Name: Hernandez, Javier C
Client ID#: 2419





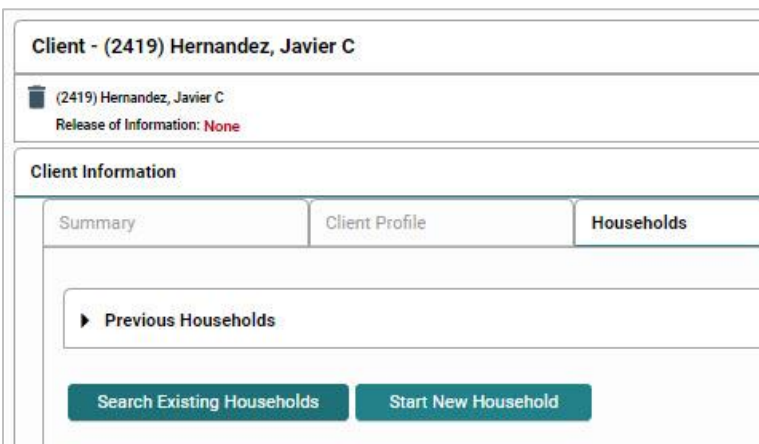
0002419

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.

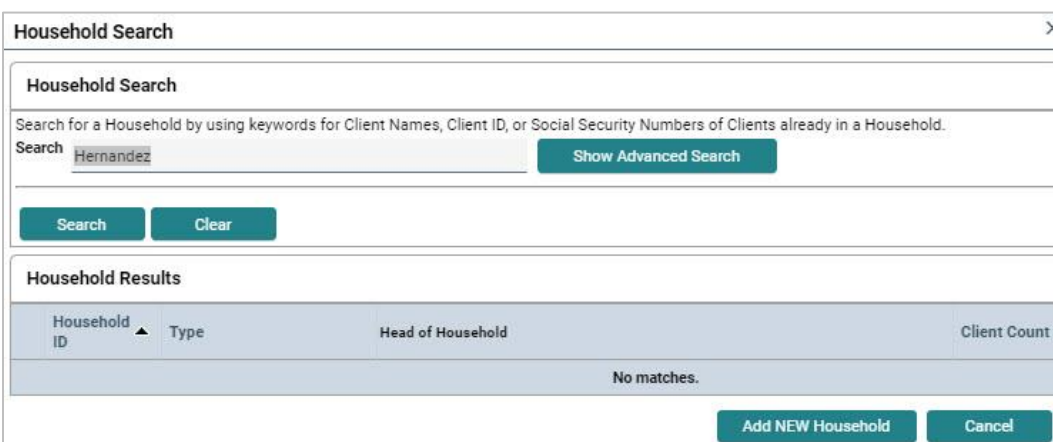
Add a household

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.



The screenshot shows the 'Client - (2419) Hernandez, Javier C' record. Under the 'Client Information' section, the 'Households' tab is selected. It displays a 'Previous Households' section with a right-pointing arrow and two buttons: 'Search Existing Households' and 'Start New Household'.

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



The screenshot shows the 'Household Search' dialog box. It has a search bar with 'Hernandez' entered and a 'Show Advanced Search' button. Below the search bar are 'Search' and 'Clear' buttons. The 'Household Results' section shows a table with columns: Household ID, Type, Head of Household, and Client Count. The table is empty with the text 'No matches.' displayed. At the bottom right are 'Add NEW Household' and 'Cancel' buttons.

6. Select the **Household Type**.

Add New Household

Household Type

Household Type * Male Single Parent

Client Search

Please Search the System before adding a New Client.
Hide Advanced Search

Items in Italics are for Data Entry ONLY and will not be used for Search Results.

Name	First Griselda	Middle E	Last Hernandez	Suffix
Name Data Quality	-Select-			Date of Birth 04 / 02 / 2023
Alias				DOB Data Quality -Select-
Social Security Number	000 - 00 - 0000			
Social Security Number Data Quality	Full SSN Reported (HUD)			
U.S. Military Veteran?	No (HUD)			

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.

- If a matching record exists, click **Add** to add the client to the household.
- If a matching record does not exist, click **Add New Client With This Information**.

Search
Clear
Add New Client With This Information
Add Anonymous Client

Client Number

Enter or Scan a Client ID to add that Client to this Household.

Client ID # Submit

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 1-10 of 15
First
Previous
Next
Last

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

Add New Client Information
✕

You are about to add a New Client to the system (Be sure to look through all the possible matches before continuing this process). Continue with Add New Client?

Ok
Cancel

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

9. Click **Continue**.

Selected Clients

ID	Name	Social Security Number	Date of Birth	Alias	Gender	Banned	Household Count
2434	Hernandez, Griselda E	000-00-0000	04/02/2023				0
2419	Hernandez, Javier C	000-00-0000	07/29/1970	Java			0

Showing 1-2 of 2

Continue
Cancel

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

Household Information - (662) Male Single Parent

(662) Male Single Parent

Save
Save & Exit
Exit

Household Type*

Male Single Parent ▼

Income

US\$0.00

Client Count

2

Household Members

Name	Age	Head of Household	Relationship to Head of Household	Joined Household*	Previous Associations	Household Count
(2434) Hernandez, Griselda E	1	No ▼	-Select- ▼	11 / 05 / 2024	0	1
(2419) Hernandez, Javier C	54	No ▼	-Select- ▼	11 / 05 / 2024	0	1

Add/Delete Household Members
Household History Report

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 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**.

Client Information	
Summary	Client Profile
Households	
▼ (662) Male Single Parent Name (2434) Hernandez, Griselda E (2419) Hernandez, Javier C (2436) Hernandez, Javier P, Jr. (2435) Hernandez, Mark J Manage Household	

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

Household Information - (662) Male Single Parent

(662) Male Single Parent

Save Save & Exit Exit

Household Type * Male Single Parent

Income US\$0.00

Client Count 4

Household Members

Name	Age	Head of Household	Relationship to Head of Household	Joined Household *	Previous Associations	Household Count
(2434) Hernandez, Griselda E	1	No	Daughter	11 / 05 / 2024	0	1
(2419) Hernandez, Javier C	54	Yes	Self	11 / 05 / 2024	0	1
(2436) Hernandez, Javier P, Jr.	4	No	Son	11 / 05 / 2024	0	1
(2435) Hernandez, Mark J	29	No	Son	11 / 05 / 2024	0	1

Add/Delete Household Members Household History Report

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

Household Members

- (2434) Hernandez, Griselda E Age: 1
- (2419) Hernandez, Javier C Age: 54
- (2436) Hernandez, Javier P, Jr. Age: 4
- (2435) Hernandez, Mark J Age: 29

Client Record

Issue ID Card

Name Hernandez, Griselda E

Name Data Quality Full Name Reported

Alias

Social Security 000-00-0000

SSN Data Quality Full SSN Reported (HUD)

U.S. Military Veteran? No (HUD)

Client ID 2434

Age 1

APR Entry

Required of all clients

Name and SSN recorded elsewhere.

Date of Birth 04 / 02 / 2023

Date of Birth Type -Select-

Gender

- Woman (Girl, if child)
- Man (Boy, if child)
- Culturally Specific Identity (e.g., Two-Spirit)
- Transgender
- Non-Binary
- Questioning
- Different Identity
- Client doesn't know
- Client prefers not to answer
- Data not collected

Clear All

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.

Household Members	Client Record																
☒ 2419) Hernandez, Javier C Self, Age: 54 ☒ 2434) Hernandez, Griselda E Daughter, Age: 1 ☒ 2436) Hernandez, Javier P, Jr. Son, Age: 4 ☒ 2435) Hernandez, Mark J Son, Age: 29	Issue ID Card  <table border="1"> <tr><td>Name</td><td>Hernandez, Javier C</td></tr> <tr><td>Name Data Quality</td><td>Full Name Reported</td></tr> <tr><td>Alias</td><td>Java</td></tr> <tr><td>Social Security</td><td>000-00-0000</td></tr> <tr><td>SSN Data Quality</td><td>Full SSN Reported (HUD)</td></tr> <tr><td>U.S. Military Veteran?</td><td>Yes (HUD)</td></tr> <tr><td>Client ID</td><td>2419 </td></tr> <tr><td>Age</td><td>54</td></tr> </table>	Name	Hernandez, Javier C	Name Data Quality	Full Name Reported	Alias	Java	Social Security	000-00-0000	SSN Data Quality	Full SSN Reported (HUD)	U.S. Military Veteran?	Yes (HUD)	Client ID	2419 	Age	54
Name	Hernandez, Javier C																
Name Data Quality	Full Name Reported																
Alias	Java																
Social Security	000-00-0000																
SSN Data Quality	Full SSN Reported (HUD)																
U.S. Military Veteran?	Yes (HUD)																
Client ID	2419 																
Age	54																

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**.

Release of Information

Release of Information - (2434) Hernandez, Griselda E

Household Members

To include Household members for this Release of Information, click the box beside each name. Only members from the SAME Household may be selected.

☒ (662) Male Single Parent

☒ (2419) Hernandez, Javier C

☐ (2434) Hernandez, Griselda E

☒ (2436) Hernandez, Javier P, Jr

☒ (2435) Hernandez, Mark J

Release of Information Data

Provider *

WellSky (0)

SearchMy ProviderClear

Release Granted *

Yes

Start Date *

11 / 05 / 2024

End Date *

11 / 04 / 2025

Documentation

Signed Statement from Client

Witness

Lesli Ritchie

Save Release of Information

Cancel

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**.

Release of Information

	Provider	Permission	Start Date	End Date	
 	WellSky	Yes	11/05/2024	11/04/2025	

Add Release of Information

Showing 1-1 of 1

Exit

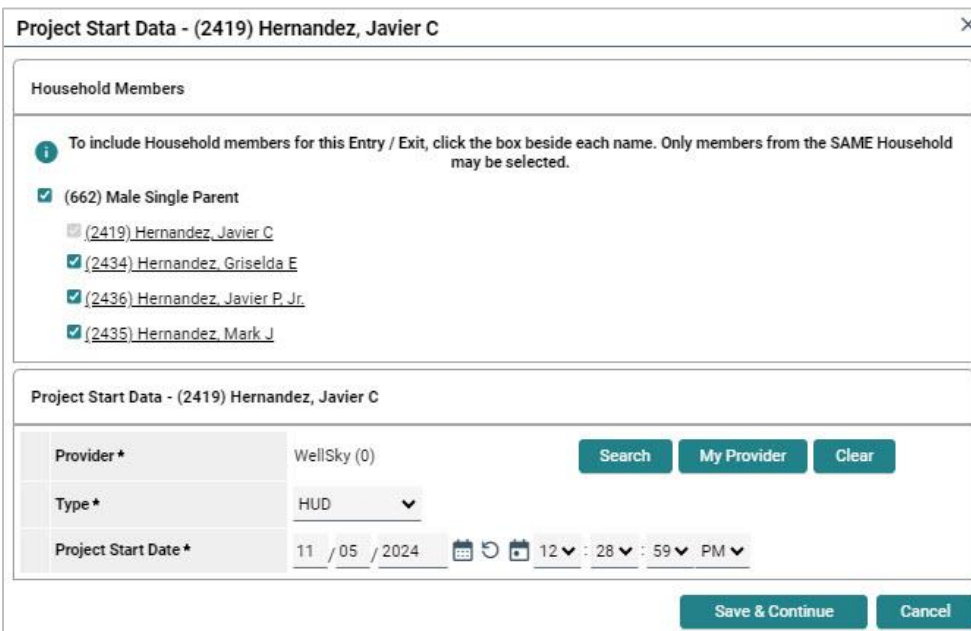
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Entry / Exit tab

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**.



Project Start Data - (2419) Hernandez, Javier C

Household Members

To include Household members for this Entry / Exit, click the box beside each name. Only members from the SAME Household may be selected.

- ☒ (662) Male Single Parent
 - ☐ (2419) Hernandez, Javier C
 - ☒ (2434) Hernandez, Griselda E
 - ☒ (2436) Hernandez, Javier P, Jr.
 - ☒ (2435) Hernandez, Mark J

Project Start Data - (2419) Hernandez, Javier C

Provider *	WellSky (0)	Search	My Provider	Clear
Type *	HUD			
Project Start Date *	11 / 05 / 2024	12	: 28	: 59 PM

Save & Continue Cancel

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**.

Entry/Exit Data

Note: If you change the provider selected it may cause the Assessments to adjust for the new Provider's Entry/Exit Assessment defaults. Any information saved to the previous Assessment will still be attached to that Assessment record for the Client.

Provider *

WellSky (0)

Search

My Provider

Clear

Type *

HUD

Update

Household Members Associated with this Entry / Exit

	Name	Head of Household	Project Start Date	Exit Date	Interims	Follow Ups	Reason for Leaving	Destination	Notes
	(2419) Hernandez, Javier C	Yes	11/05/2024						
	(2434) Hernandez, Griselda E	No	11/05/2024						
	(2436) Hernandez, Javier P, Jr.	No	11/05/2024						
	(2435) Hernandez, Mark J	No	11/05/2024						

Include Additional Household Members

Showing 1-4 of 4

Entry Assessment

Select an Assessment

☒ Additional Profile Information

☒ HUD CoC/ESG/SNOFO Entry SO ES SH (FY2024)

☒ HHS PATH Entry for SO (FY2024)

☒ Medicaid Billing Export Info

Household Members

(2419) Hernandez, Javier C

Age: 54

Veteran: Yes (HUD)

(2434) Hernandez, Griselda E

Age: 1

Veteran: No (HUD)

(2436) Hernandez, Javier P, Jr.

Age: 4

Veteran: No (HUD)

(2435) Hernandez, Mark J

Age: 29

Veteran: Yes (HUD)

Additional Profile Information

Entry Date: 11/05/2024 12:42:23 PM

Client's Residence / Last Permanent Address

Client's Street Address	Client's City	Client's State	Client's ZIP	Home Phone Number
Add				

Date of Birth

07 / 29 / 1970

Date of Birth Type

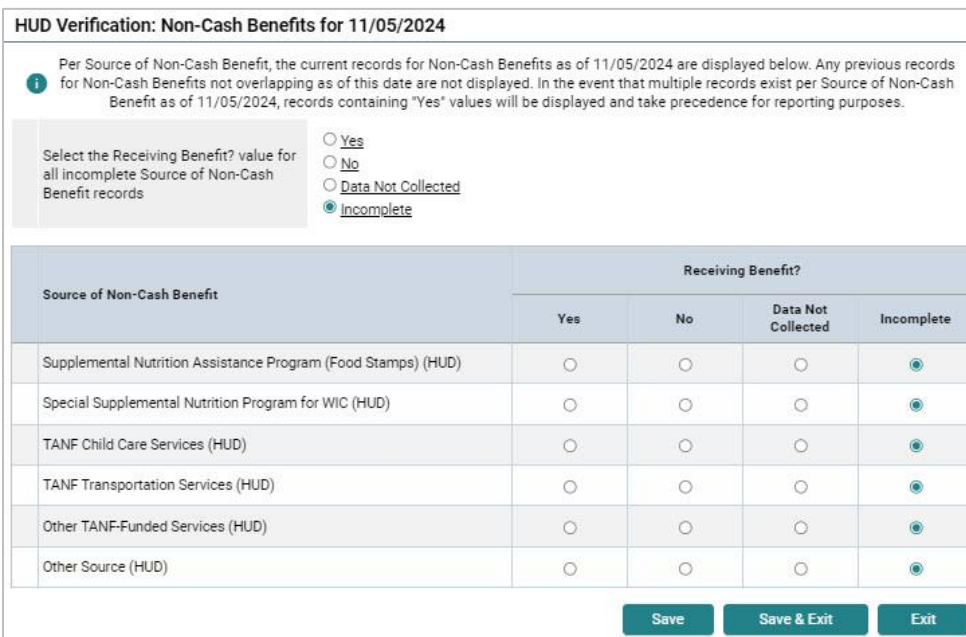
Full DOB Reported (HUD)

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.



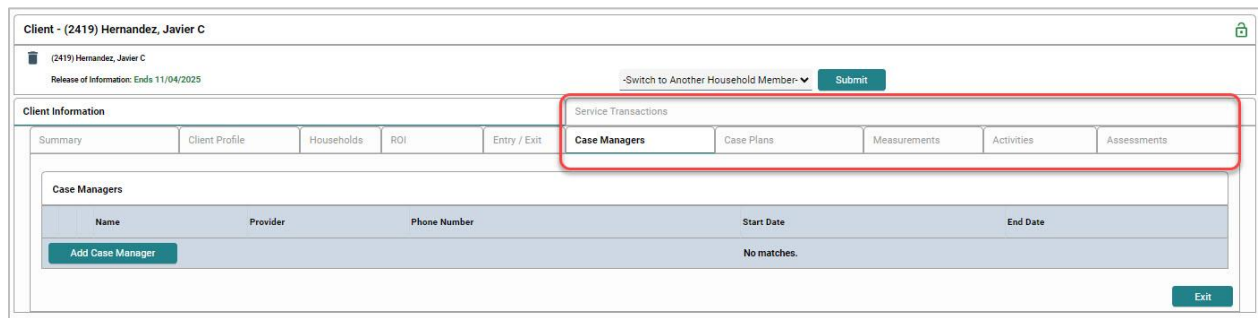
12. When finished, click **Save & Exit**.

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 Manager

Case Manager - (2419) Hernandez, Javier C

Household Members

To include Household members for this Case Manager, click the box beside each name. Only members from the SAME Household may be selected.

(662) Male Single Parent

(2419) Hernandez, Javier C

(2434) Hernandez, Griselda E

(2436) Hernandez, Javier P, Jr.

(2435) Hernandez, Mark J

Type *

Community Services User

Me

Other

Name *

Lesli Ritchie

Title

Case Manager

Phone Number

5555555555

Email Address

lritchie@email.com

Provider *

WellSky (0)

Search

My Provider

Clear

Start Date *

11 / 05 / 2024

End Date

/ /

Add Case Manager

Cancel

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**.

Goals							
	Date Set ▾	Provider	Classification	Type	Status	Outcome	Notes Latest Note Date
Add Goal		No matches.					

Case Plans File Attachments				
	Date Added ▾	Name	Description	Type Provider
Add New File Attachment		No matches.		

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**.

Goal

Goal - (2419) Hernandez, Javier C

Household Members

To include Household members for this Goal, click the box beside each name. Only members from the SAME Household may be selected.

(662) Male Single Parent

☒ (2419) Hernandez, Javier C

☐ (2434) Hernandez, Griselda E

☐ (2436) Hernandez, Javier P Jr.

☐ (2435) Hernandez, Mark J

Provider *

WellSky (0)

Search My Provider Clear

Case Manager

Lesli Ritchie

Date Goal was Set *

11 / 05 / 2024

Classification *

Education

Type *

Get GED

Goal Description

Target Date

03 / 01 / 2025

Overall Status *

Identified

If Closed, Outcome

-Select-

If Partially Complete, Percent Complete

-Select-

Projected Follow Up Date

01 / 02 / 2025

Follow Up User

WellSky (0)

Search My Provider Clear

Lesli Ritchie

Follow Up Made

-Select-

Completed Follow Up Date

Outcome at Follow Up

-Select-

Add Goal

Cancel

- 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.

Case Notes

	Provider	Case Manager	Note Date	Note
 	WellSky	Lesli Ritchie	11/05/2024	Mr. Hernandez will enroll at the local community college.

Add Case Note

Showing 1-1 of 1

Action Steps Planned

	Action Step	Target Date	Status	Outcome	
 	Complete enrollment	11/13/2024	In Progress		

Add Action Step

Showing 1-1 of 1

Service Items for this Goal

	Date Set	Created By	Need Type	Need Status	Outcome of Need
 	11/13/2024	Lesli Ritchie	Bus Fare	Identified	

Add Service

Add Multiple Services

Showing 1-1 of 1

Print

Save Goal

Save & Exit

Exit

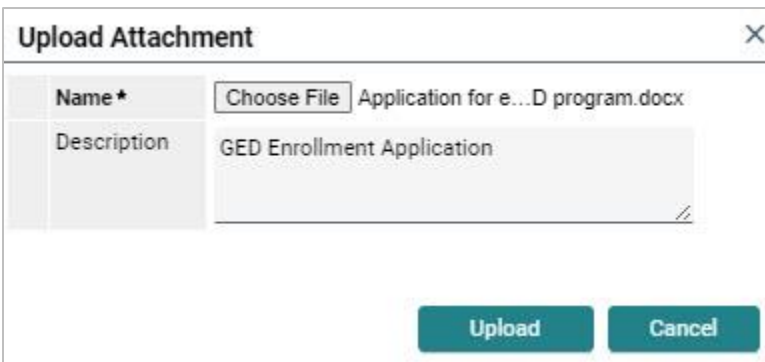
Add attachments to a case plan

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**.

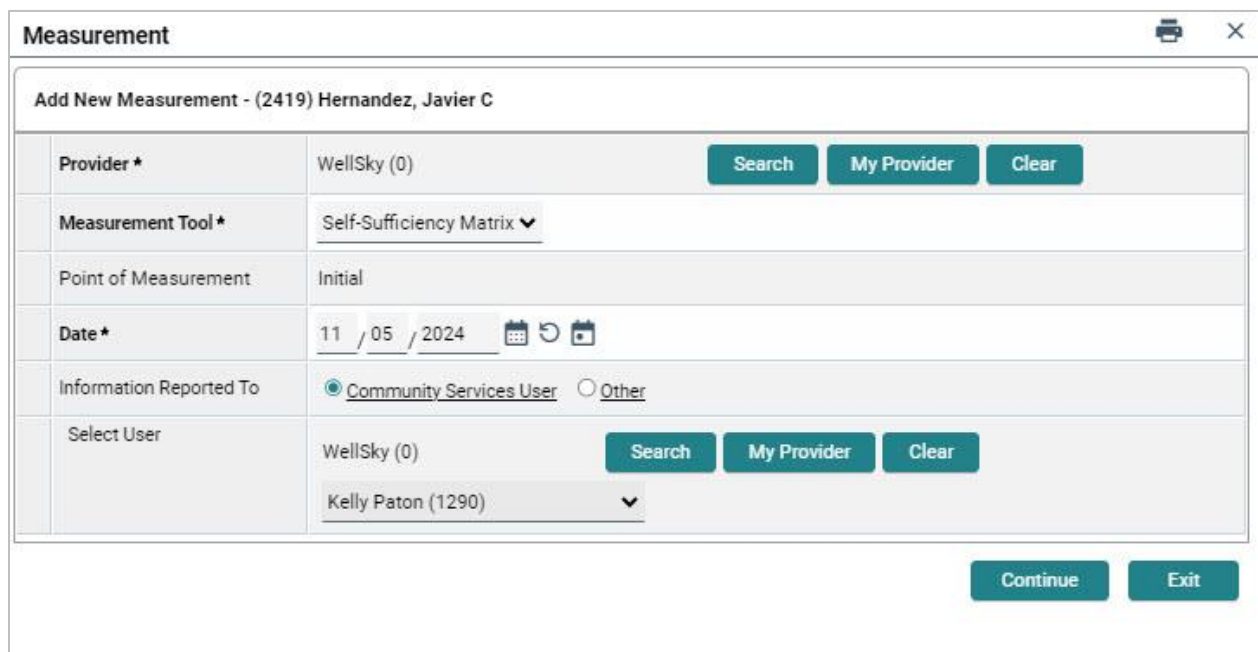


8. Click **Exit**.

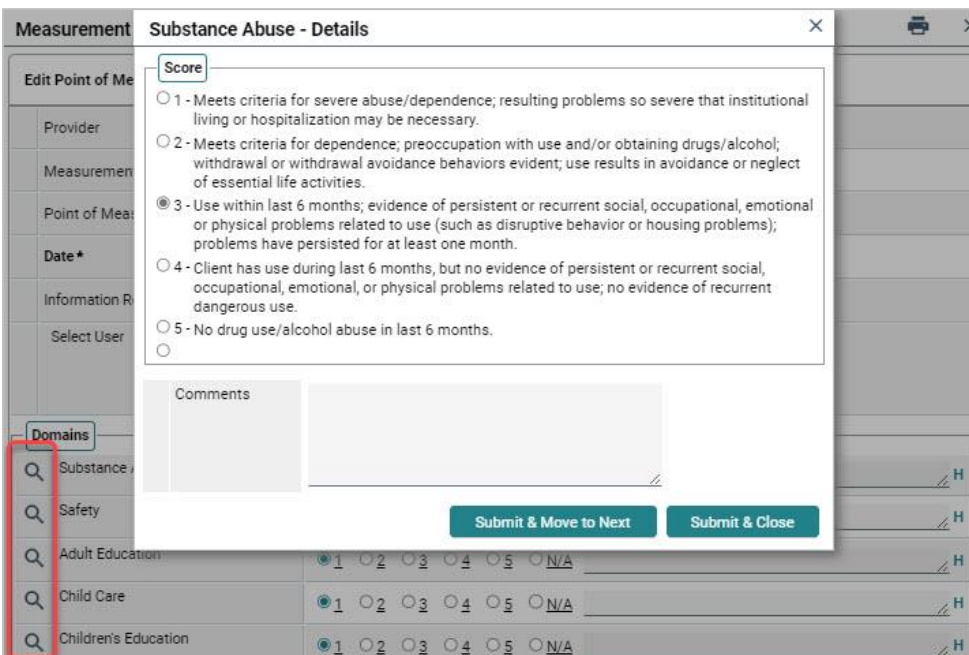
Measurements tab

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.



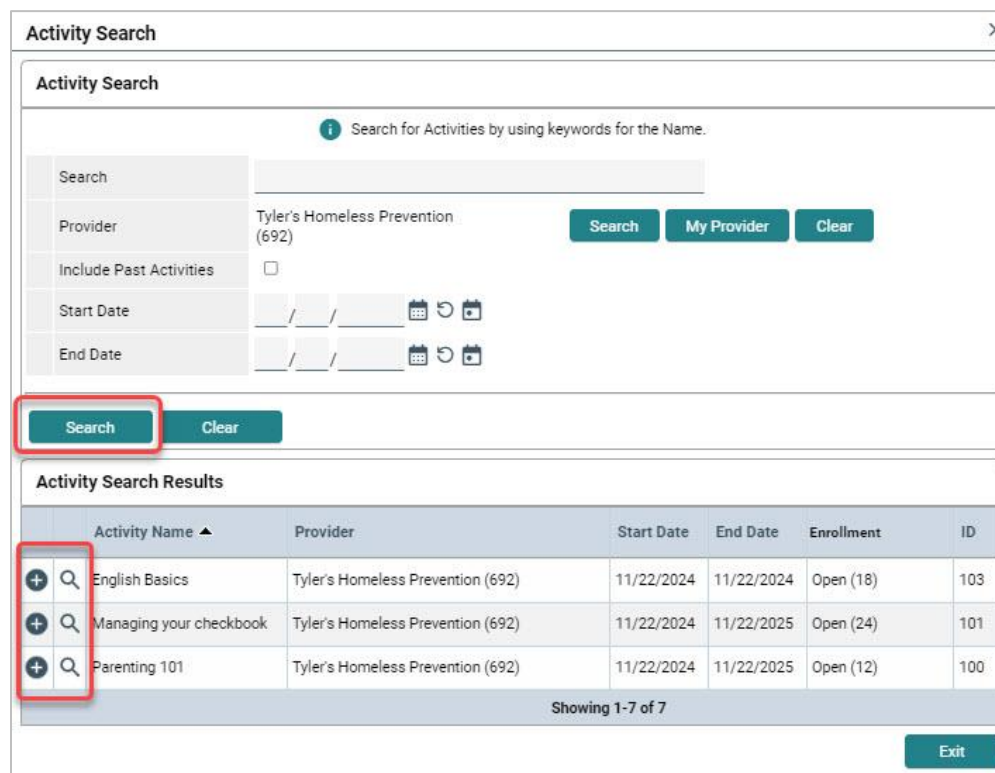
TIP - For more information, see the *Self-Sufficiency Outcomes Matrix Workflow* on the WellSky Client Resource Center.

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.



Activity Search

Search for Activities by using keywords for the Name.

Search:

Provider: Tyler's Homeless Prevention (692) Search My Provider Clear

Include Past Activities: ☐

Start Date:

End Date:

Search Clear

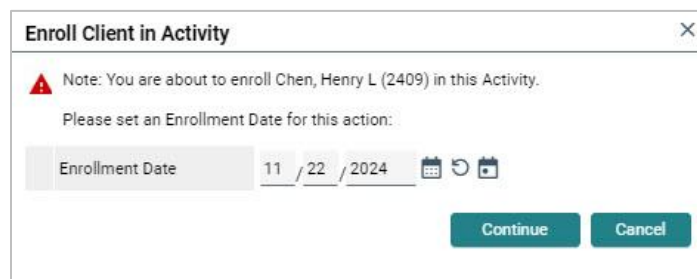
Activity Search Results

	Activity Name ▲	Provider	Start Date	End Date	Enrollment	ID
 	English Basics	Tyler's Homeless Prevention (692)	11/22/2024	11/22/2024	Open (18)	103
 	Managing your checkbook	Tyler's Homeless Prevention (692)	11/22/2024	11/22/2025	Open (24)	101
 	Parenting 101	Tyler's Homeless Prevention (692)	11/22/2024	11/22/2025	Open (12)	100

Showing 1-7 of 7

Exit

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



Enroll Client in Activity

 Note: You are about to enroll Chen, Henry L (2409) in this Activity.

Please set an Enrollment Date for this action:

Enrollment Date: 11 / 22 / 2024

Continue Cancel

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:

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

- Current Activities

Past Activities

All Activities

▼ Enrolled Activities

Activity Name ▲	Enrollment Date	Start Date	Start Time	End Date	Frequency	Attendance
English Basics	11/22/2024	11/22/2024	8:00 AM	11/22/2024	Once a Month	0/0

Enroll in Activity

Showing 1-1 of 1

▼ Wait Listed Activities

Activity Name ▲	Wait List Date	Start Date	Start Time	End Date	Frequency
Managing your checkbook	01/01/2025	11/22/2024	6:00 PM	11/22/2025	One-time event

Showing 1-1 of 1

▼ Dropped Activities

Activity Name ▲	Drop Date	Start Date	Start Time	End Date	Frequency	Attendance
No matches.						

▼ Pending Activities

Activity Name ▲	Date Referred	Start Date	Start Time	End Date	Frequency
No matches.					

▼ Denied Activities

Activity Name ▲	Date Denied	Start Date	Start Time	End Date	Reason Denied	Notes
No matches.						

Exit

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**.

		Service Transactions				
	Entry / Exit	Case Managers	Case Plans	Measurements	Activities	Assessments
Select an Assessment						
Medicaid Billing Export Info ▼		Submit				

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

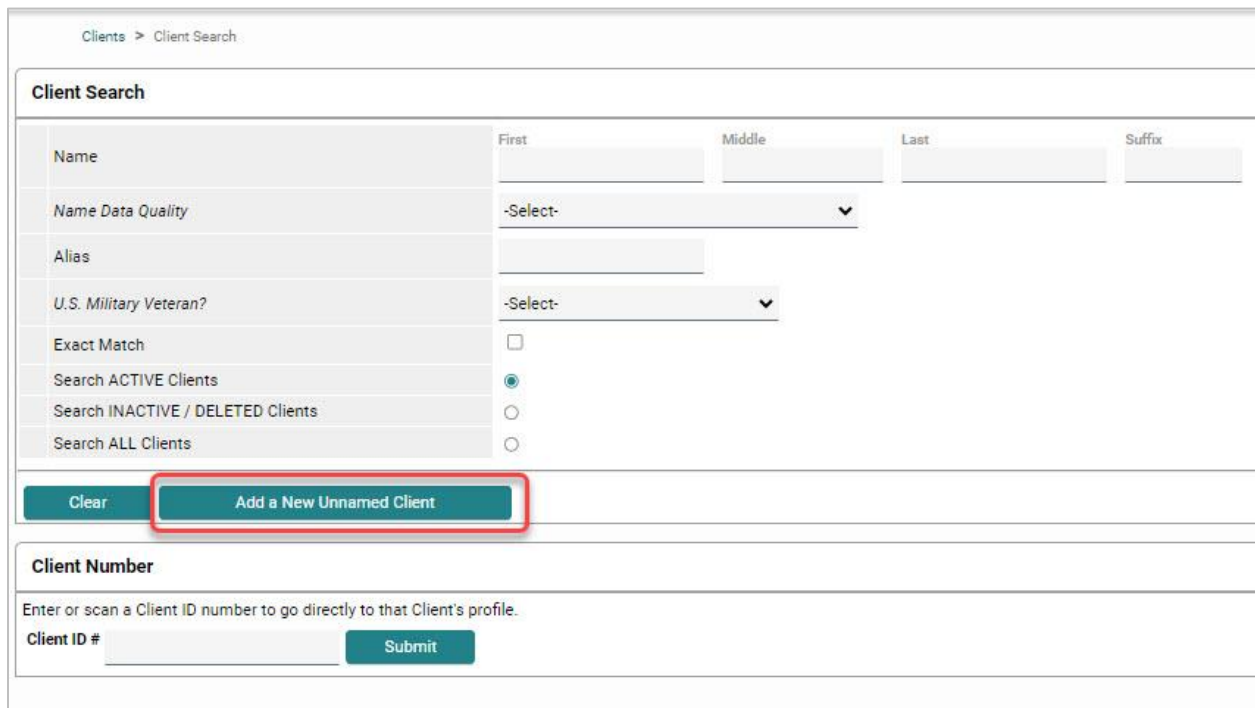
Create an anonymous client record

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**.



Client Search

Name	First	Middle	Last	Suffix
Name Data Quality	-Select-			
Alias				
U.S. Military Veteran?	-Select-			
Exact Match	☐			
Search ACTIVE Clients	☒			
Search INACTIVE / DELETED Clients	☐			
Search ALL Clients	☐			

Clear Add a New Unnamed Client

Client Number

Enter or scan a Client ID number to go directly to that Client's profile.

Client ID # Submit

4. Follow the steps in [Create a named client](#) record, beginning with step 2.

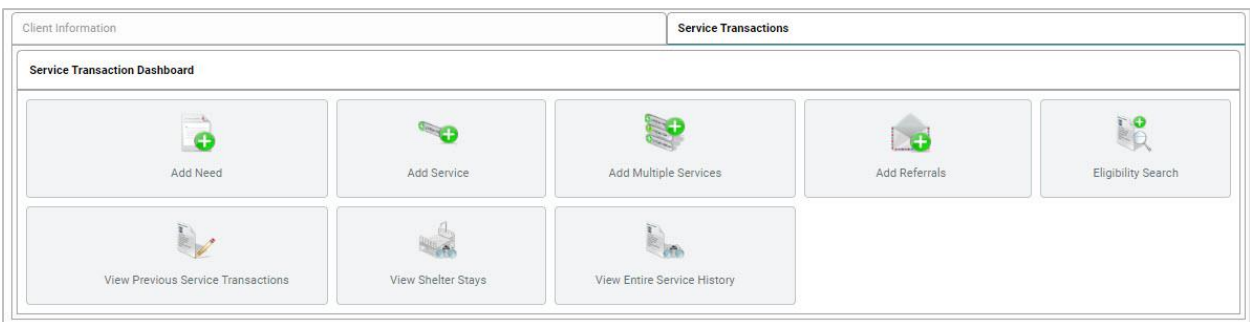
Service transactions

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

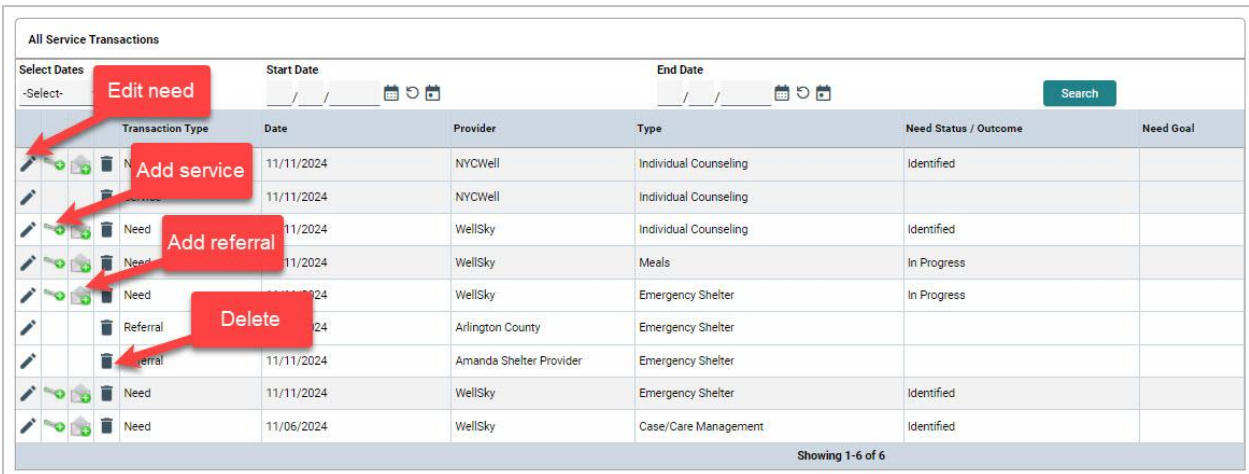
The client has a *need* for emergency shelter. The *service* provided is emergency shelter. If a *referral* is made, the referral is made to an emergency shelter.

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.



All Service Transactions						
Select Dates	Start Date	End Date				
-Select-	/ /	/ /				
Transaction Type	Date	Provider	Type	Need Status / Outcome	Need Goal	
Need	11/11/2024	NYCWell	Individual Counseling	Identified		
Need	11/11/2024	NYCWell	Individual Counseling			
Need	11/11/2024	WellSky	Individual Counseling	Identified		
Need	11/11/2024	WellSky	Meals	In Progress		
Need	11/11/2024	WellSky	Emergency Shelter	In Progress		
Referral	11/11/2024	Arlington County	Emergency Shelter			
Referral	11/11/2024	Amanda Shelter Provider	Emergency Shelter			
Need	11/11/2024	WellSky	Emergency Shelter	Identified		
Need	11/06/2024	WellSky	Case/Care Management	Identified		

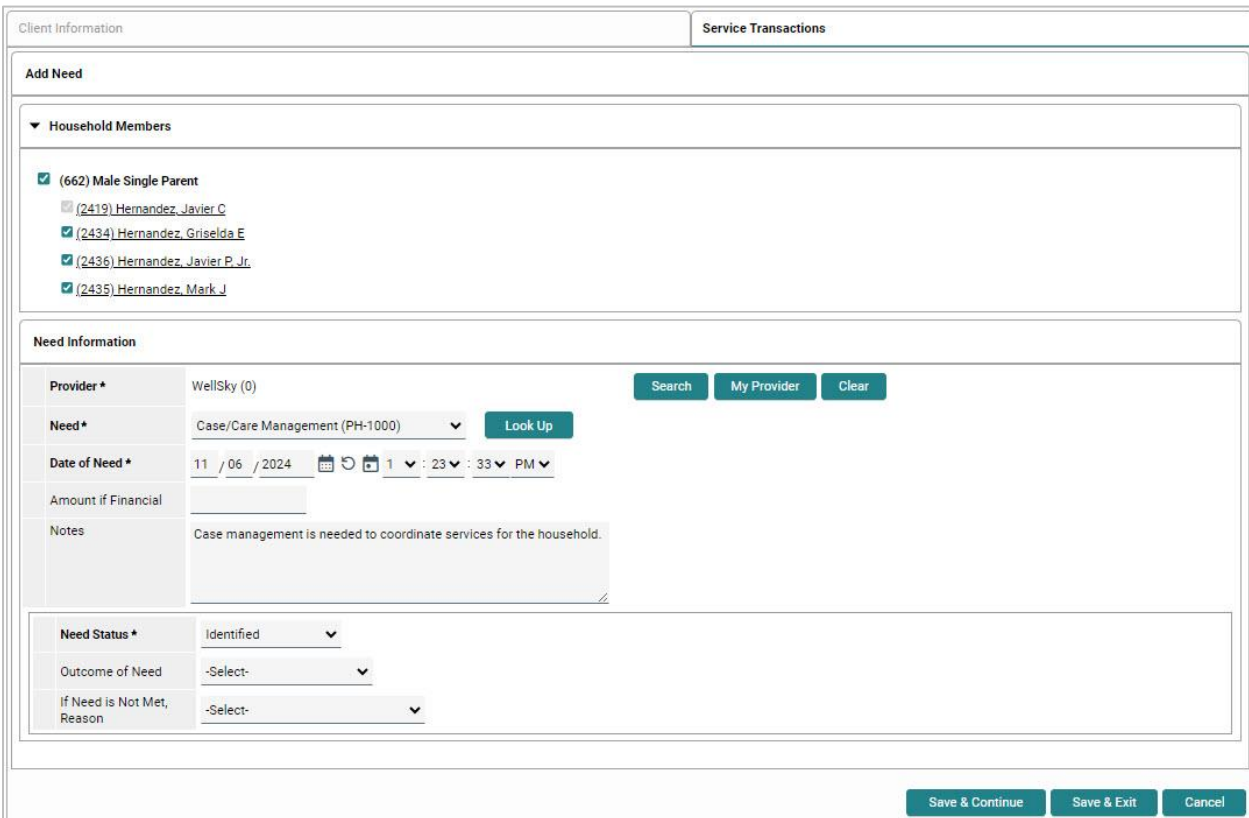
Showing 1-6 of 6

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.

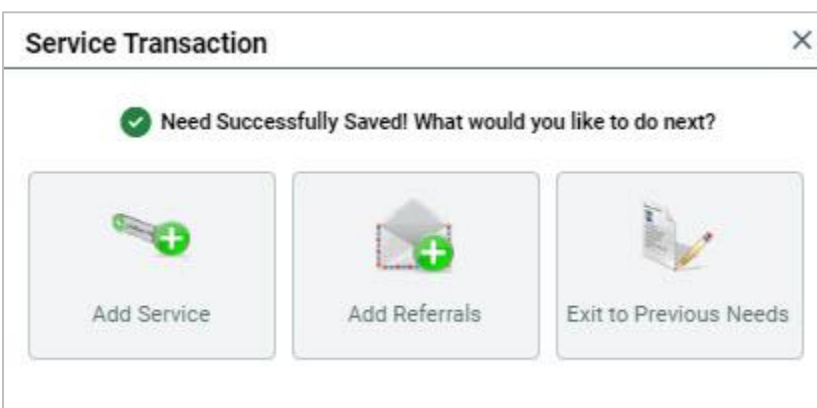
1. From the Clients module, search for and open the client record.
2. Select the **Service Transactions** tab.
3. Click **Add Need**.
4. If the client is a member of a household, select the members who have the same need.
 - a. To select the entire household, select the head of household.
5. In the Need 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**.

Add Service

Household Members

☒ (662) Male Single Parent

☐ (2419) Hernandez, Javier C. (Primary Client)
 ☒ (2434) Hernandez, Griselda E.
 ☒ (2436) Hernandez, Javier P. Jr.
 ☒ (2435) Hernandez, Mark J.

Include Additional Household Members

Service Provider *

WellSky (0)

Search My Provider Clear

Creating User

Lesli Ritchie

Start Date *

11 / 06 / 2024

1 : 42 : 56 PM

End Date

12 / 06 / 2024

1 : 42 : 56 PM

Service Type *

Make Service same as Need

Case/Care Management (PH-1000)

Look Up

Provider Specific Service

-Select-

Save & Continue Cancel

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.

Follow Up Information

Projected Follow Up Date

11 / 12 / 2024

Follow Up User

WellSky (0)

Search My Provider Clear

Lesli Ritchie

Follow Up Made

-Select-

Completed Follow Up Date

/ /

10. Click **Save & Continue**.

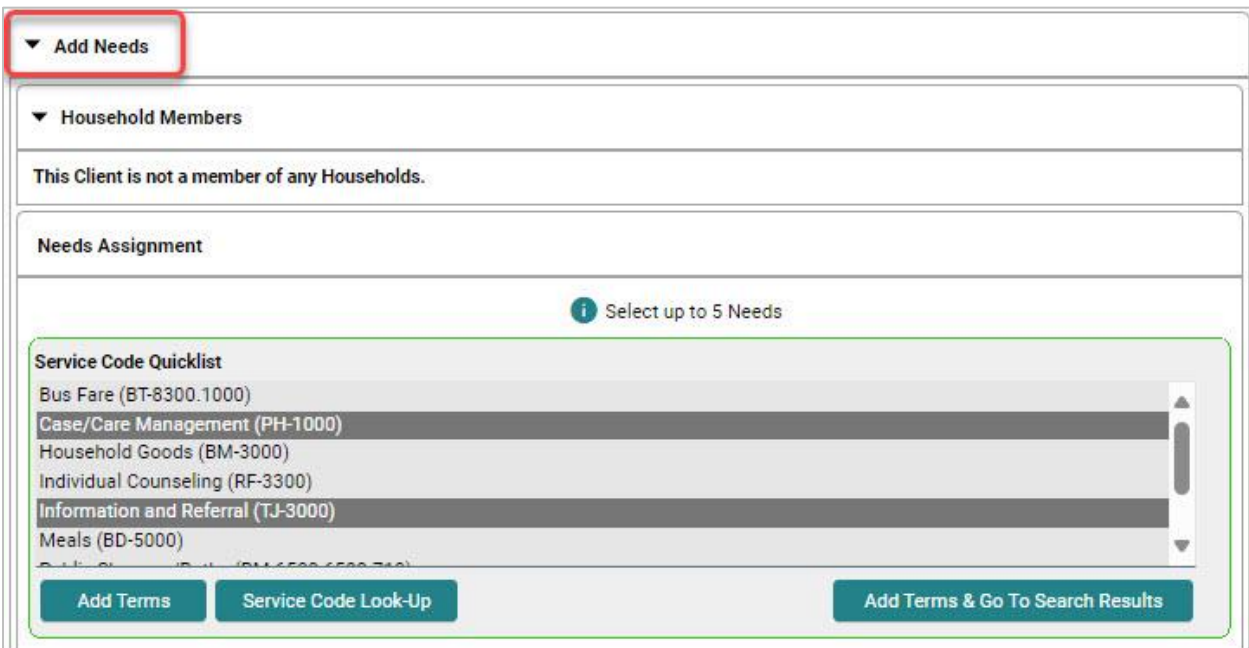
Add a referral and a need

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.



▼ Add Needs

▼ Household Members

This Client is not a member of any Households.

Needs Assignment

Select up to 5 Needs

Service Code Quicklist

- Bus Fare (BT-8300.1000)
- Case/Care Management (PH-1000)
- Household Goods (BM-3000)
- Individual Counseling (RF-3300)
- Information and Referral (TJ-3000)
- Meals (BD-5000)

Add Terms Service Code Look-Up Add Terms & Go To Search Results

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.

Search Results

#	A	B	C	D	L	O	Q	R	S	T	U	V	W	X	Y	Z	All
	Provider				Type	Phone	Location				Distance	Matched Needs					
+		ECHO Call Center				Level 2	318-213-8780	Myrtle Beach, SC 29577				N/A	2/2				
+		TJOAS - Advanced Boot camp Provider				Level 2	Unknown	Unknown				N/A	2/2				
+		2-1-1 with Centralized Intake				Level 1	Unknown	Phoenix, AZ 85020				N/A	1/2				
+		Amanda Level 2 Different Tree				Level 2	602-222-3333	Phoenix, AZ 85020				N/A	1/2				
+		Amanda Level 2 Provider B				Level 2	318-213-8780	Shreveport, LA 71101				N/A	1/2				
+		Amanda Level 2 Provider C				Level 2	318-213-8780	Shreveport, LA 71101				N/A	1/2				
+		Arlington County				Level 2	318-213-8780	Shreveport, LA 71101				N/A	1/2				
+		Bob's 2-1-1				Level 2	602-242-2110	Phoenix, AZ 85020				N/A	1/2				
+		Bob's Call Center				Level 1	602-242-2110	Phoenix, AZ 85020				N/A	1/2				
+		Bob's Regional Behavioral Health Program				Level 2	602-242-2110	Phoenix, AZ 85020				N/A	1/2				

Bed Availability

Showing 1-10 of 88

First

Previous

Next

Last

1/2 Matched Needs

Information and Referral

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.

Referral Data

Needs Referral Date *	11 / 20 / 2024				3	:	32	:	46	PM	
Referral Ranking	High										
Projected Follow Up Date	11 / 26 / 2024										
Follow Up User	WellSky (0)		Search		My Provider		Clear				
	Lesli Ritchie										


☒ Check to notify Community Services Providers by Email.

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.