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| **SUBJECT:** WellSky PCOC System Maintenance and Enhancements | **DATE:** 8/16/2021 |
| **TARGET AUDIENCE:** MyOptions Advisors and DOIT | **REFERENCE NUMBER:** 04 |
| **TYPE:  NEW  REVISIONS:** | **REVISION DATE:** 11/2/2021 |
| **PURPOSE:** Provides guidance to counselors participating as PCOC MyOptions Advisors and DOIT staff regarding WellSky PCOC system maintenance and enhancements. This policy covers:   1. The process to identify and resolve WellSky system issues (e.g., the system is not loading, error messages, etc.). 2. The process to identify and make configuration (e.g., revise a field, add additional field options) OR system enhancement (e.g., adding a new WellSky module or system feature) changes. 3. Communication of WellSky system updates (e.g., general software updates, security upgrades, etc.).   *For all other issues (e.g., adding users, password issues, etc.) or questions, please email Gina (Gina.Lauro@doit.ri.gov) for support.* | |
| **CHANGES SINCE LAST REVISION:**   1. 8/30/21: Clarified what type of information the PCOC Counselor should include in their email when reporting an issue or identifying a configuration change or system enhancement. This impacts A1 and B1 below. 2. 10/26/21: Defined the role of PCOC Counselors as counselors participating as PCOC MyOptions Advisors. All references to PCOC Counselors changed to MyOptions Advisors. 3. 10/27/21: Process change removing Sarah Harrigan and Lisa Tse from configuration changes and system enhancements and replacing with Elaine Choiniere. 4. 11/2/21: Clearly define difference between Enhancement and Configuration Requests.   **DOCUMENTS/ASSOCIATED RESOURCES:**   * WellSky Training Guide   **ATTACHMENTS:** N/A | |

1. **Process to resolve issues in WellSky:**
2. MyOptions Advisors email Gina (Gina.Lauro@doit.ri.gov) regarding any WellSky system issues. The MyOptions Advisor should CC their assigned supervisor. MyOptions Advisor should include the following information in their email to Gina (This will help Gina better understand the issue):

* Detail of where the issue occurred. *Ex. Caller record, notes tab.*
* The case ID (if available).
* A screenshot of the issue (if applicable)

1. Gina adds the issue to the WellSky ticketing system.
2. WellSky addresses the system issue and requests user testing.
3. Gina emails the MyOptions Advisor, that identified the issue, to confirm that the issue has been corrected.
4. MyOptions Advisor verifies whether the system issue has been resolved. The MyOptions Advisor will email Gina regarding whether the issue is fixed or if the issue remains.
5. Gina closes the ticket OR updates the ticket if the issue remains.
6. After the issue is resolved, Gina will notify the MyOptions Advisor(s). All MyOptions Advisors should be notified if the issue impacted all users.
7. **Process to identifying and approving WellSky configuration changes or system enhancements:**

General

1. Gina summarizes/collects MyOptions Advisors feedback and shares the recommendations with Elaine Choiniere ([Elaine.Choiniere@ohhs.ri.gov](mailto:Elaine.Choiniere@ohhs.ri.gov)).
   1. General timing: On Monday, Gina will review all feedback from the week prior (M-F) and send an email to Elaine any proposed changes on Tuesday.
2. Elaine will review the proposed WellSky system changes with the PCOC Best Practice committee.

Enhancement Requests

1. Elaine will coordinate with Ann and Gina to communicate all internally requested enhancement(s) to WellSky. Elaine will email Gina with the details of the enhancement request(s). Gina will submit the requested proposed enhancement to WellSky.
2. All enhancement requests will be fully scoped by the WellSky Team to determine change feasibility, time allotment and costs (if any).
3. Upon receipt of WellSky’s Enhancement Request decision from Gina, Elaine will provide to Ann and the PCOC Best Practices Committee. If/when appropriate, committee will make the final decision, based on time, cost, need, and benefit, regarding whether to proceed with the enhancement request.
4. Approved enhancement request(s) will be sent via email to Gina as a request to submit a ticket to Wellsky. Gina will submit the ticket to WellSky.
5. Gina will email Elaine once the enhancement request is complete and is part of the production environment. If there is an anticipated systems impact, Gina will Elaine notify prior to the update for further distribution.

Configuration Requests

1. Elaine will email Gina with the approved and denied configuration changes.
2. For all approved configuration changes, Gina will make the configuration change and request that the MyOptions Advisor, that proposed the change(s), verify that the configuration update was accurate.
3. Gina will email Elaine once the configuration update is complete and is part of the production environment.

General

1. Elaine will notify the PCOC Best Practice Committee of all production changes.
2. Elaine will notify the MyOptions Advisors of any configuration changes or system enhancements using the revisions log.
3. **Communication to MyOptions Advisors regarding official WellSky system updates**:
4. *Official system update notifications*: Users will be notified of system updates by Gina, or by the business lead (TBD) if she is out of office.
5. *WellSky system update webinars*: Gina will email Elaine Choiniere and Ann Martino to determine whether the webinar would be beneficial to the MyOptions Advisors.
   1. Elaine and Ann will share the WellSky webinar link with the MyOptions Advisors if appropriate.

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