

RHODE ISLAND EXECUTIVE OFFICE OF HEALTH & HUMAN SERVICES (EOHHS): PERSON CENTERED OPTIONS COUNSELING (PCOC)

WELLSKY TRAINING GUIDE

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1-855-WELLSKY

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Icons Used in this Manual

Icon	Description
	<p>Tip</p> <p>Tips provide general recommendations on how to make it easier or more productive to use the Harmony solution.</p>
	<p>Caution</p> <p>The Caution icon highlights areas of note or concern, where failure to use the system properly may cause or exacerbate problems.</p>
	<p>Note</p> <p>Notes provide additional information of general interest about a specific function or process of the Harmony solution.</p>
	<p>Example</p> <p>Examples are provided to help you develop a better understanding of the subject area and how the Harmony solution may be used in a specific scenario of relevance.</p>

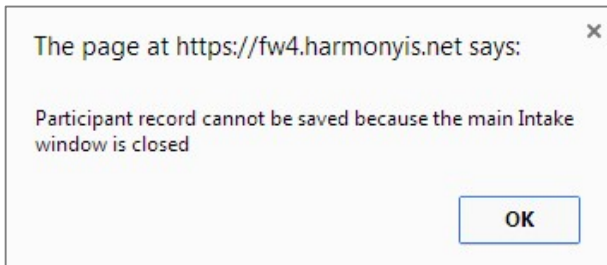
WELLSKY Basics

WELLSKY is a web-based system that is accessed from a Web browser, specifically Internet Explorer® (IE). Your workstation will be configured before you “go live” to allow the system and all its functionality to operate properly. If you experience any problems during training or after “go live”, please coordinate with your System Administrator to evaluate the issue.

Screen Stacking

In WELLSKY, you will do a lot of opening and closing of screens (windows). As you are working, you can have many screens open and not know because they’re stacked on top of each other. There is no harm in this, but it can make working in WELLSKY more cumbersome. Open screens can prevent you from getting to another area of the program. On the other hand, closed screens can also prevent you from moving around.

If a screen has been closed, but should have remained open, you will see an error message similar as this:



Participant record cannot be saved because the main Call window is closed.



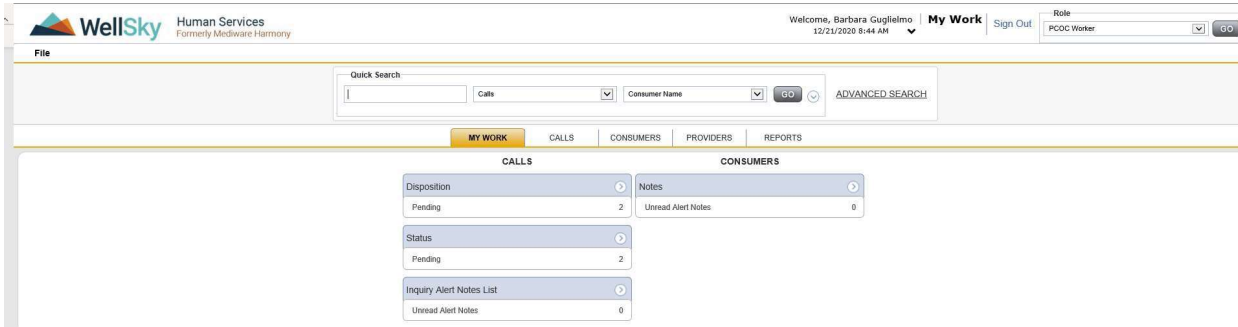
Best Practices recommend that you click **File > Save and Close** when you are saving records. This prevents unnecessary screens from staying open.

Logging into WELLSKY



Your WELLSKY Application Administrator will provide you with the URL (Internet Address) and your login credentials for both the Sandbox Environment and Live system when appropriate.

1. Open Internet Explorer and then enter the URL for WELLSKY.
2. At the login, type your **User ID** and **Password**.
3. Click **Login**.
 - a. The **My Work Dashboard** is displayed.



My Work Dashboard

Exit WELLSKY

To exit WELLSKY:

1. In the upper right portion of the screen, click **Sign Out**.



Sign Out

WELLSKY Password Guidelines

When changing your password, keep the following guidelines in mind.

Typical Password Guidelines:

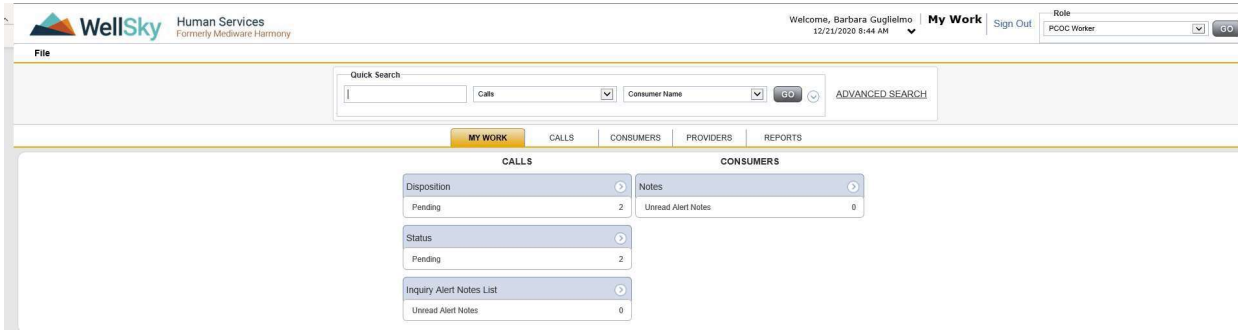
- Must be at least 8 characters
- Include at least 1 lower case letter (a-z)
- Include at least 1 special character (!, #, \$, %, etc.)
- Cannot be reused
- Expires after 60 days
- You are allowed 3 unsuccessful login attempts, and then you will be locked out of your account.

My Work

The My Work chapter displays an overall view of information specific to your work and tasks. Your username and role (as configured by the system administrator) appear on top of the page in the header bar.

The My Work chapter groups data in the following sections:

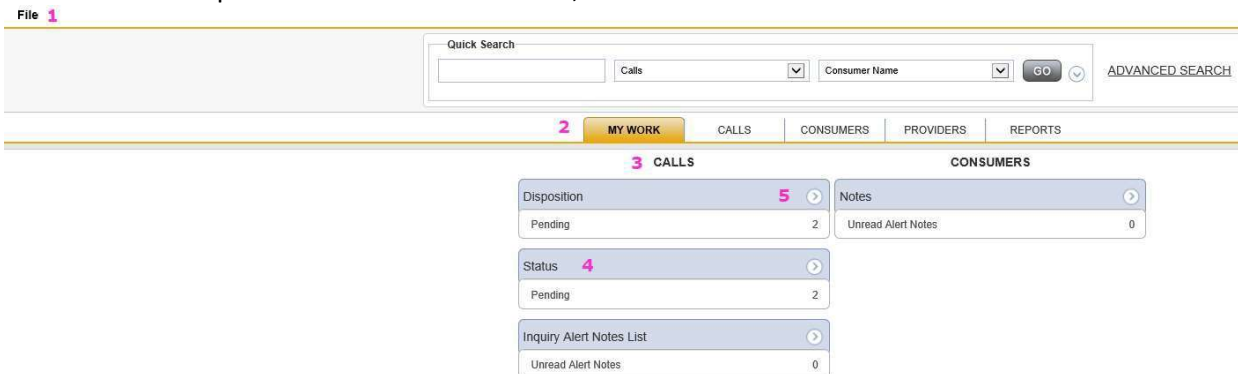
- Calls
- Consumers



My Work Dashboard

My Work Screen Elements



There are several parts of the **MY WORK** screen, as shown in the screenshot below:



My Work Dashboard

- 1 The File menu is located throughout the program. Items on the File menu vary, depending on what you are doing. One of the more common functions you'll use is the **File > Add Notes** and **File > Save and Close Notes**.
- 2 The tabs along the top of the screen are called **Chapters**. A chapter is like a section of the program. To move to another chapter, just click it. If you have the "UTILITIES" Chapter, let your supervisor know immediately. This chapter is reserved for IT.
- 3 **MY WORK** is divided into areas for calls and consumers. You may see all or just some of these areas.
- 4 Within each area are boxes that contain information. These are referred to as **Panes**. Each pane includes a right facing arrow. When you click the arrow, items in the pane are collapsed. This is helpful if you need more space on your screen. To expand the items in the pane, click the now right-facing arrow.



Many areas of the program allow you to collapse sections (panels). Click the down arrow in the circle . When you click it, it becomes a right-facing arrow .

My Work Panes

Within each Pane on the My Work homepage, numbers will be visible next to different items. These numbers represent the number of activities that exist for that topic. For example, in the screenshot below, one can see that there are three calls with Task Status equal to Pending PCOC Follow-Up/Close-Out.

CALLS

Task Status >

Closed	6
Closed - Intake and Screening	1
Pending	3
Pending Initial Call with the Consumer	21
Pending PCOC Follow-Up/Close-Out	3
Reached Consumer, Scheduled Call to Discuss Options	3

Overall Status >

Complete	2
Open	30
Pending	5

Calls Notes List >

Pending	1
---------	---

Call Alert Notes List >

TASKS

Links >


PCOC Counselor Materials

My Dashboards >

Worker

My Work>Calls Pane

- To display the pending call records, click anywhere in the row, as highlighted in the screenshot above.



Welcome, Barbara Guglielmo | **Task Status**
3/15/2021 9:17 AM

File

Filters

Task Status Equal To

Call ID +

3 Task Status record(s) returned - now viewing 1 through 3

Call ID	Call Date	Call Time	Call Method	Overall Status	Call Priority	Reporter Name	Prospective Consumer First Name	Prospective Consumer Last Name	Task Status	Checked Out To
10198	01/08/2021	2:08 PM	Telephone	Open		Harrison, David	David	Harrison	Pending PCOC Follow-Up/Close-Out	Guglielmo, Barbara
10193	12/21/2020	8:02 AM	Telephone	Open	Routine	Rodgers, Cecilia L	Laura	Lawson	Pending PCOC Follow-Up/Close-Out	Schmidt, Dustin
10192	12/14/2020	8:20 AM	Telephone	Open			Jason	Vanderbilt	Pending PCOC Follow-Up/Close-Out	

Call Task Status List Grid

- A list view page opens to show the records. You can filter the results in a list view page to help find the records you need to work with.



File

Filters

Disposition: [Dropdown] Equal To: [Dropdown] Pending: [Dropdown] AND: [Dropdown]

Call ID: [Dropdown] +

Search Reset

2 Disposition record(s) returned - now viewing 1 through 2

Call ID	Call Date	Call Time	Call Method	Call Status	Call Priority	Reporter Name	Prospective Consumer First Name	Prospective Consumer Last Name	Disposition	Received By
10193	12/21/2020	8:02 AM	Telephone	Pending	Routine	Rodgers, Cecilia L.	Laura	Larson	Pending	Guglielmo, Barbara
10192	12/14/2020	8:20 AM	Telephone	Pending		Jason		Vanderbill	Pending	Guglielmo, Barbara

<< First Previous Retrieve 15 Records at a time Next >> Last >>

Call Task Status List Grid

3. Hover over the fly-out menu at the end of a row to see more options.

Pending Ticklers

The Ticklers pane shows pending ticklers, which represent tasks that must be completed. Workers can select any task and complete it. Once completed, the tickler is removed from the Pending Ticklers list.

Unread Notes

The Unread Notes section of My Work shows notes created by other workers and routed to you. Select the unread note to view it. If a note is routed to a user who doesn't have the My Work Calls sections they will not receive the note, but the note is still visible in the call or consumer record.

Alert Notes

The Alert Notes section of the My Work Calls section shows alert notes routed by other workers. Click on the alert note to view it. If a note is routed to a user who doesn't have the My Work Calls section, they will not receive the note, but the note is still visible in the consumer or provider record.

Opening a note from My Work

When a note is routed to a note recipient, the note will appear in that worker's My Work desktop. Routing a note to another worker is a valuable way to securely share notes relevant to consumers in WellSky Human Services. Notes will be listed in a Notes node on the My Work desktop. A Notes pane may appear in either the Calls or Consumers sections of your My Work desktop.

1. To open a note from My Work
2. From the **My Work** dashboard, navigate to the **Notes** node.

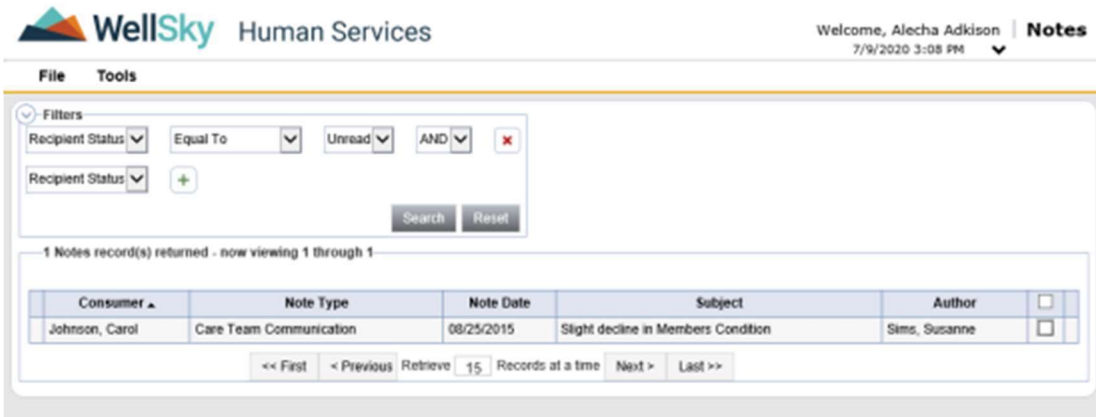


Notes	
Draft	1
Pending	1

Notes	
Unread Alert Notes	1

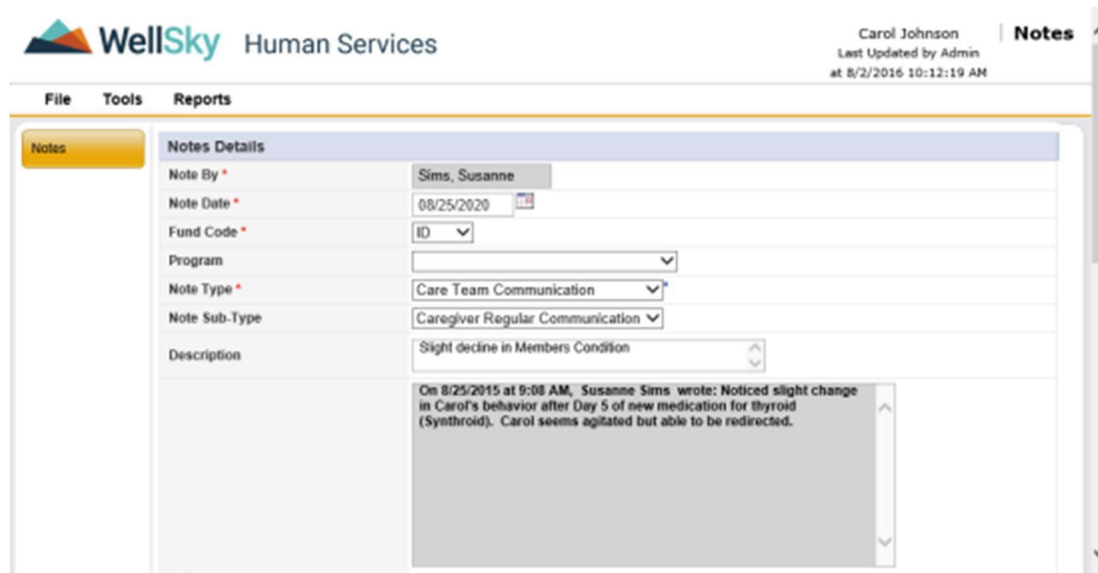
My Work>Notes Pane

3. Select a Notes queue. For example, select the **Unread Alert Notes** queue. The Notes list view page opens.



My Work>Note List Grid

4. Select the note from the list view grid. The Note detail page opens.



Note Details Page

1. From the Notes detail page, you can read and edit the note, add an attachment, and forward it to another worker as a note recipient.
2. WellSky Human Services includes an option in the System Setup utility that allows workers to manually mark a note as read. When this option is active, the note will remain listed in the My Work Notes queue until you mark it as read. To mark a note as read, select **Mark as Read** from the **Tools** menu.
3. To export the note in report format, select **Note Detail** from the **Reports** menu.
4. To close the note, select **Save and Close Notes** from the **File** menu.

Opening a tickler from My Work

Ticklers are the individual tasks that workers are prompted to complete when an event occurs. Ticklers remind users to complete a screen, fill out a form, or perform some other action. A Ticklers pane may be found in more than one section of My Work. You may see a Ticklers section in the Calls or Consumers sections.

Ticklers are associated with Workflow Wizards (WFWs).

You can also open ticklers from the specific chapter. For example, you can open ticklers from the Consumers chapter.

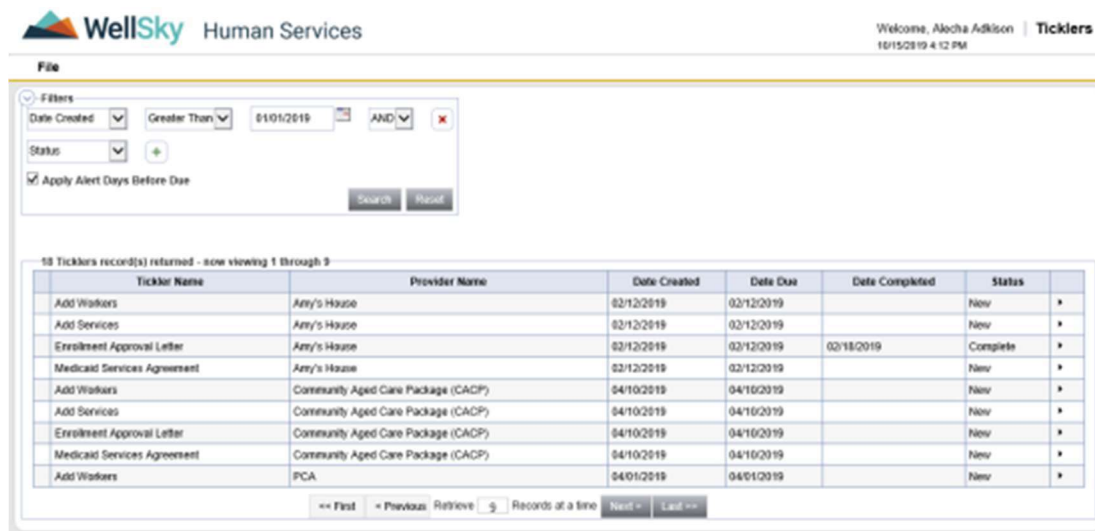
To open a tickler from My Work

1. Click the **Ticklers** link in the section you are working with.



My Work>Ticklers Pane

2. The Ticklers list view page opens. If needed, use the filters to locate the tickler.



My Work>Ticklers List Page

To see a tickler that has a future due date, clear the **Apply Alert Days Before Due** option in the Filters section. Click **Search**.

3. Select the tickler you want to work with from the list view grid. The page that opens will be specific to the tickler. For example, if the tickler name indicates an enrollment letter, the mail merge page will open. If the tickler name indicates adding a worker, the provider's worker page might open.
4. If the tickler is part of a Workflow Wizard, the left-hand navigation area will show the Workflow Wizard step or steps.
5. Complete the task defined in the tickler. Select **Save** from the **File** menu when done.

Navigating the Application

This section provides a brief overview and some tips for working in the application.

Chapters

Chapters are links to different areas of WELLSKY. Authorized users can access chapters at any time by simply clicking the desired Chapter button (or tab) across the top of the screen. Note that not all workers can see all the listed chapters.

Your view may differ from the example below. (Remember, every Role will have different Chapters. If you have the “UTILITIES” Chapter, let your supervisor know immediately. This chapter is reserved for IT.)

My Work Calls Providers Resources Reports

Chapter	Definition
My Work	My Work displays an overall view of information specific to the logged in user. The page provides links to information assigned only to the user along with reporting and user management assignments for quick reference and easy access.
Calls	The Calls Chapter is used to record the first reported information necessary for initiating the screening process. All Call records can be accessed in this chapter.
Providers	The Providers Chapter contains records of Providers such as Office of Healthy Aging. Provider records may contain information such as Workers, Notes, and Enrollments.
Resources	The Resources Chapter contains Resource records. These records contain contact information, hours, directory info and services.
Reports	The Reports Chapter provides standard reports on the data contained in the application.

File Menu Bar

The **File** menu is displayed throughout the application and is in the upper left corner of the screen. Depending on the screen that’s open, other menus may be displayed. This is the location where you’ll go to create or add files, close and save files and print files, among other functions.

Additional functions remain available under each option. Hovering your cursor above each **File Menu** bar category will expand additional menus. Access to these is granted based on the permissions which are driven by roles. Some examples include and are not limited to: **Save, Save and Close, Print, and Add Call.**



File **Tools** **Reports** **Word Merge**

WellSky Toolbar

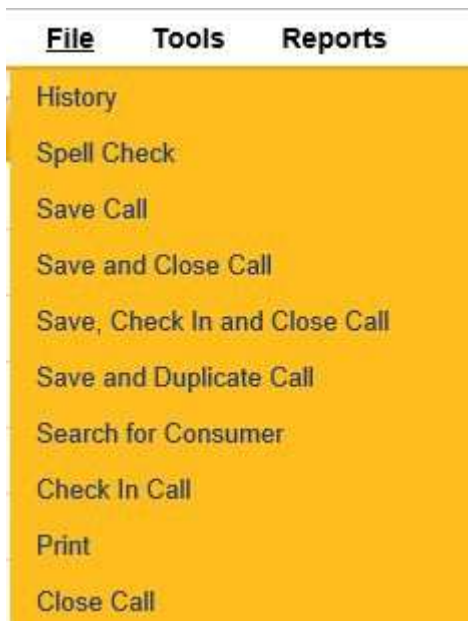
Functions within the **File** menu are consistent for most pages.

When users scroll through a page in WELLSKY, the **File Menu** header is frozen so that users will always be able to access these **File Menu** functions no matter where the cursor is located on the page.

- **File** – Contains the functions to add a new record or to view history changes to the data in view.
- **Edit** – Provides the ability to make changes to the data included in the record.
- **Tools** - Provides the user with additional functionality based on the page currently in view.
- **Reports** – Lists standard reports built into the WellSky software. Additional reports may be available to certain roles or groups. If a user has access to the Reports Menu, click the menu and select the report and it will open in a new window.
- **Ticklers** – Provides the user with a list of “ticklers” or reminders generated for a specific Call record. This menu is only displayed at a chapter level.
- **Word Merge** - Lists documents that have been uploaded to the application using the **Word Merge** Utility and are available to certain roles and groups. If a user has access to the **Word Merge** File menu, to access the document, click the file menu and select the document and it will open a new window.

Call Records: File Menu

As you are working within a record, you will save and close records. This is done on the **File** menu, located near the top of your screen. The **File** menu options change, depending on what you’re doing; the screenshot below displays what the **File** menu might look like.



Example of File menu

The table below describes some of the **File** actions you'll work with as you are creating a call record.

File Menu	Description
History	Allows user view history changes to the data in view.
Save	Saves changes since the last save and keeps the record open. Saving a record can be done at any time.
Save and Close	Saves changes since the last save and closes the record.
Print	Allows user to print the information on the current screen.
Delete	Allows user to delete the record permanently.
Close	Closes the record without saving any recent changes.



When you need to add, remove, or save files, the **File** menu is the place to go. An example in the directions could appear as: go to **File > Save and Close Notes**. Closing a window by clicking on the "X" in the top right-hand corner of the window is not recommended. Information may be lost.

Field Formats

There are a few different types of data fields within WellSky, such as text boxes, checkboxes, date fields, dropdowns (sometimes called lookups) and search fields.

Required Fields

Required fields are always indicated by a red asterisk (*)

Fields that affect other fields

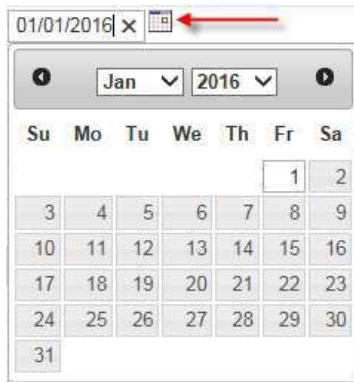
Sometimes choosing a value in one dropdown field will filter or change the values shown in another dropdown field on the same page. This is indicated with a black asterisk (*) to the right of the field.

Date Fields

Date fields can be populated in either of two ways. First, the user can simply type the numbers and WellSky will automatically format the field.

E.g. for this date field, the user typed: 01012016

The other option is to click on the calendar icon and use the calendar display. To select a specific date, simply click on the number after the correct month and year are chosen.



Pre-formatted Fields

Some fields are pre-formatted for certain types of data, most commonly this includes SSN and Phone fields. The user may simply type the numbers and WellSky will automatically add the appropriate formatting such as dashes or brackets.

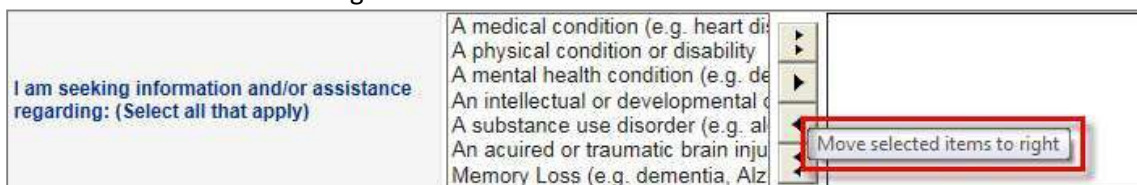
E.g. for this phone field, the user typed: 5555555555



Multi Select Boxes





Using the Arrow Buttons

Some areas of the application require you to select items from a list, and move them from one field to another, using arrow buttons. If you hover over one of the arrow buttons, a tooltip is displayed that describes what the button does. In the screenshot below, the mouse was hovering over the button to move selected items to the right.



Example of a Multi-Select Question

Button Definitions

-  Move all items from the left to the right
-  Move selected items from the left to the right
-  Move selected items from the right to the left
-  Move all items from the right to the left

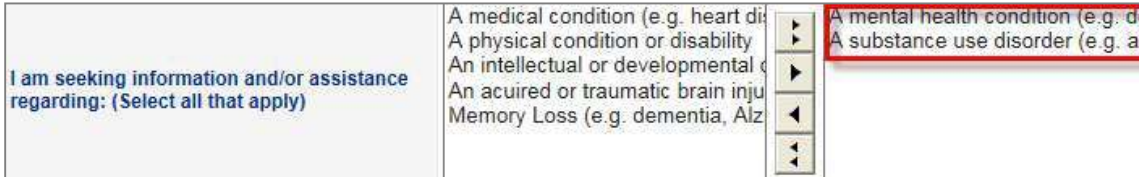
Using the Shift and Ctrl keys

If you want to select more than one item, and the items are *all together*, press and hold the **Shift** key on your keyboard and select the first and last records in the group. Then, click the right-facing button to move all items to either the right or left field.

If you want to select more than one item, and the items are *not together*, press and hold the **Ctrl** key on your keyboard and click the records you want. Click the right-facing button to move the items to either the right or left field.

Example

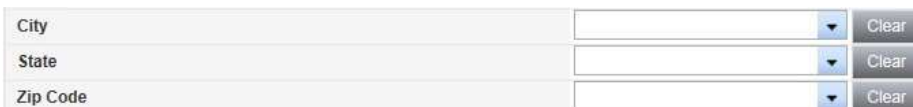
In the screenshot below, the applicant is requesting information on a mental health condition and a substance use disorder. You could either select each item from the left side and click the right-facing arrow to move them to the right or use your **Ctrl** key to select both items at the same time and then click the right-facing arrow.



Example of a Multi-Select Question

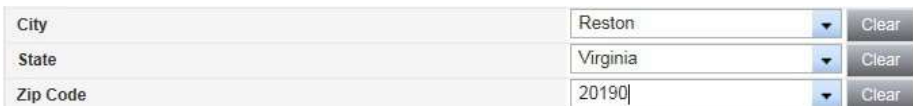
Places

The Places feature within WellSky allows address fields to be linked together and prefill or filter the options for the linked fields. This also prevents users from selecting incorrect combinations.



Example of Address fields

Entering a zip code first, for example, will filter the other fields automatically, and if there is only one option, the other fields will pre-fill. The fields below were all populated simply by entering a zip code of 20190.



Example of Address fields

List Views and Search Filters

In various areas of WellSky, records may appear in a **List View** screen. These screens limit the number of records returned at one time.

Walsh, Poppy (10002)

Demographics | Guardianship Status | Program Enrollments | Notes | Documentation | Diagnosis | Medications | Family Relations | **Service Providers**

Filters: Active [v] Equal To [v] Yes [v] AND [v] [x]

Relation ID [v] +





Search [v] Reset [v]

7 Service Providers record(s) returned - now viewing 1 through 7

Relation ID	Primary Relationship	Last Name ▲	First Name	Phone	Fax Number	Work Phone	
10005	Attorney	Benson	George		(850)333-2220	(850)333-2222	gben
10006	Dentist	Brandy	Stella		(850)456-4440	(850)456-4444	sbrar
10007	Doctor	Denny	Althea		(850)787-1100	(850)787-1000	aden
10016	Pharmacy	Lopez	Charles		(850)877-1000	(850)877-7108	
10011	Cemetery	Reynolds	Jane				
10010	Insurance Company	Smith	Frank			(850)554-4444	
10009	Funeral Home	Strong	James			(850)555-5555	

Example of a list page

List View screens allow you to quickly retrieve a desired record. If the desired record is not displayed on the initial list view, you can click on one of the following buttons to scroll through the returned records:

Button	Description
	Jumps to the first record in the list
	Jumps button jumps to the previous record in the list
	Jumps to the next record in the list
	Jumps to the last record in the list



Tip

You can also modify the number of records returned in the list view by entering the desired number in the “Retrieve [15] records at a time” field and then hitting the Enter key or clicking on one of the record search buttons (i.e., First, Previous, Next, Last).

You may sort the records by ascending or descending order by clicking on the column headers in the list view.

Advanced Search

The Advanced Search function allows you to look for existing data. There are multiple options and an expanded range of input variables for detailing your criteria to find the records you need.

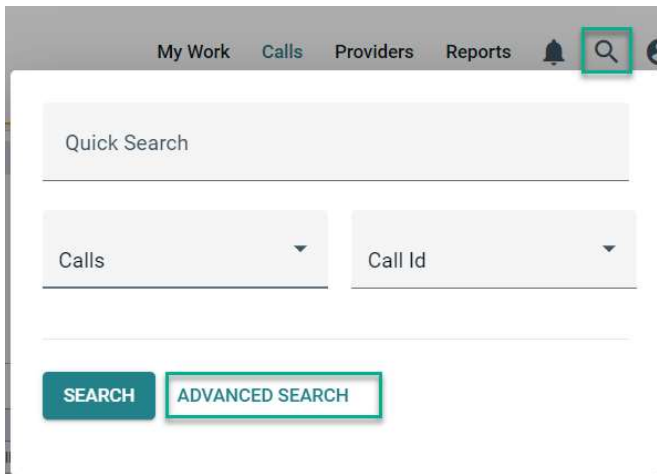
To search for a Call record using the **Advanced Search** function, take the following steps:



The screenshot shows the WellSky Human Services interface. At the top, there are navigation tabs: My Work, Calls, Providers, Reports, and icons for notifications, search, and user profile. Below the navigation is a 'File' header. A search filter box is highlighted with a red border, containing the following criteria: 'Division' (dropdown), 'Equal To' (operator dropdown), 'PCOC' (value dropdown), and 'AND' (logic dropdown). Below this, there is another 'Division' dropdown and a '+' button to add more filters. 'Search' and 'Reset' buttons are at the bottom of the filter box. Below the filter box, a message states '196 Queue Search record(s) returned - now viewing 1 through 15'. A table of search results is displayed with columns: Division, Call ID, Call Date, Call Time, Call Method, Overall Status, Task Status, Caller Name, Consumer, and PCOC Coui. Two records are visible: one for Call ID 10901 and another for 10900.

Example of Advanced Search

1. Click the **Magnifying Glass** icon.
2. Click **Advanced Search**



- a. The Advanced Search Window will appear
3. Once you have entered your search criteria in the Filters section, click **Search**.
4. The system displays all items matching the search criteria you defined.



Note

You will only be able to see items that are permitted by security settings for your User ID

Advanced Search Window

Each filter allows you to select from the following comparison search criteria:

Term	Definition
Equal To	Returns records that match the entered criteria. For example, if <Last Name> is entered as “equal to” a specific person’s name, the Consumer records assigned to that Worker will be returned.
Begins With	Returns records that begin with the entered criteria. For example, if <Last Name> is entered as “begins with” ‘T’ the system will return records assigned to the Worker having last names that start with ‘T’, such as Tester and Thomas.
Ends With	Returns records that end with the entered criteria. For example, if you search on <Last Name> “ends with” ‘r’, you can retrieve records where a Consumer’s name ends in ‘r’, such as Tester.
Not Equal To	Returns records that do not match the entered criteria. For example, if a particular name is entered for <Last Name>, the system will return a list of records except those records for the name provided in the search criteria.
Greater Than	Returns records that are dated later than the entered criteria. For example, if <DOB> is entered as “greater than” ‘03/01/2015’, the system will return all records with a record whose date of births are after March 1, 2015.
Less Than	Returns records that are dated earlier than the entered criteria. For example, if <DOB> is entered as “less than” ‘03/31/2015’, the system will return data for all records with a birth date before March 31, 2015.
Contains	Returns records that contain the entered criteria. For example, if <Last Name> is entered as “contains” specific values in the person’s name, the Consumer Record(s) assigned to that worker with those values would be returned.
Blank	A record is returned where the selected field does not have a value in the field.
Non-Blank	Returns records where the selected field does have a value in the field.

Boolean Logic

In addition, you can search on these filters using Boolean (**and/or**) logic:

- **AND** - Tightens your search: Records are returned only if they meet ALL the criteria you entered.



Example

Find Consumers where <DOB> is greater than (>) March 1, 2000 and <DOB> is less than (<) June 30, 2015. This returns all reports dated between the two dates entered.

- **OR** - Broadens your search: Records are returned if they meet EITHER criteria that you entered:



Example

Find records where <Last Name> equals <Jones> or <DOB> = “**June 22, 1998.**” The system returns records for Jones regardless of date of birth, **and** also returns any consumer records whose birth date is 06/22/2015.

Once you have entered your search criteria, click the **Search** button or you can tab to the **Search** button using your **Tab** key and press **Enter**.

The system displays all items matching the search criteria you defined.



Note

You will only be able to see items that are permitted by security settings for your User ID



Did your search return the expected results? If not, click the **Reset** button to clear your criteria. Reconsider your filters and try again.

Switching Roles

Throughout the application, you may use many different Roles. Roles define a set of capabilities or permissions that you have within WELLSKY, and each Role performs different functions. A Role change is indicated by the following symbol and instruction:



Switch Role to **PCOC Worker**

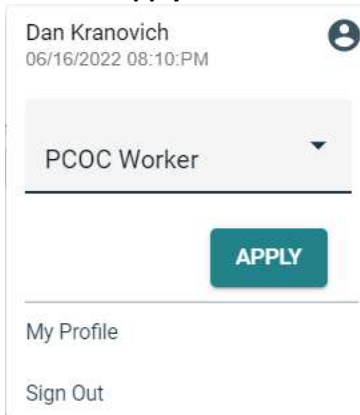
When you switch roles, the following process must be followed:

1. Go to the upper-right portion of the screen, in the **Profile Icon**



Role Setting

2. Click the Profile Icon
3. Click the down arrow and then select the **Role** you want to work with.
4. Click **Apply**



Role Setting



Note

You may not see all the roles as displayed in the dropdown list.

Using a People Search

Every time you add a person to the database as a participant, the application creates a record in the database people table. A running history of any changes or additions made to the person's participant record is recorded in the people table to help you search to find that person's record in the database.

For example, a participant is added to the database as Cheryl Smith, but she later changes her name to Cheryl Werks. Every time you add a person to the database as a participant, the application creates a record in the database people table. A running history of any changes or additions made to the person's participant record is recorded in the people table to help you search to find that person's record in the database.

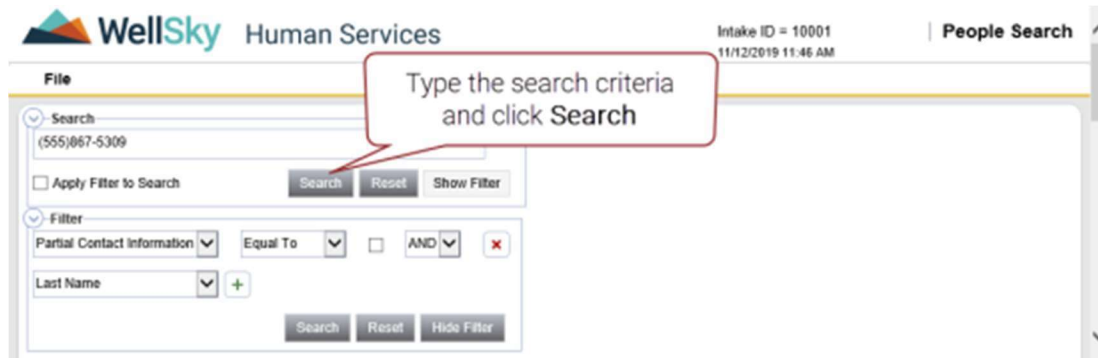
For example, a participant is added to the database as Cheryl Smith, but she later changes her name to Cheryl Werks. Both names are added to the same record in the people table. When you search for the last name "smith," the search will return information on both Cheryl Smith and Cheryl Werks because they are associated with the same person record.

You can search for each participant (for example, caller, prospective consumer, or other contact), by clicking on the search link. In the Caller and Prospective Consumer sections, the Search link is located in the section header. In the Contact section, the Search link is located in the detail page that opens when you add a new record.

Note: Any information you type in the demographic fields can be used as part of the search. For example, if you type the last name before you select the Search link, the filter will include the last name as a search criterion.

To use people search without filters

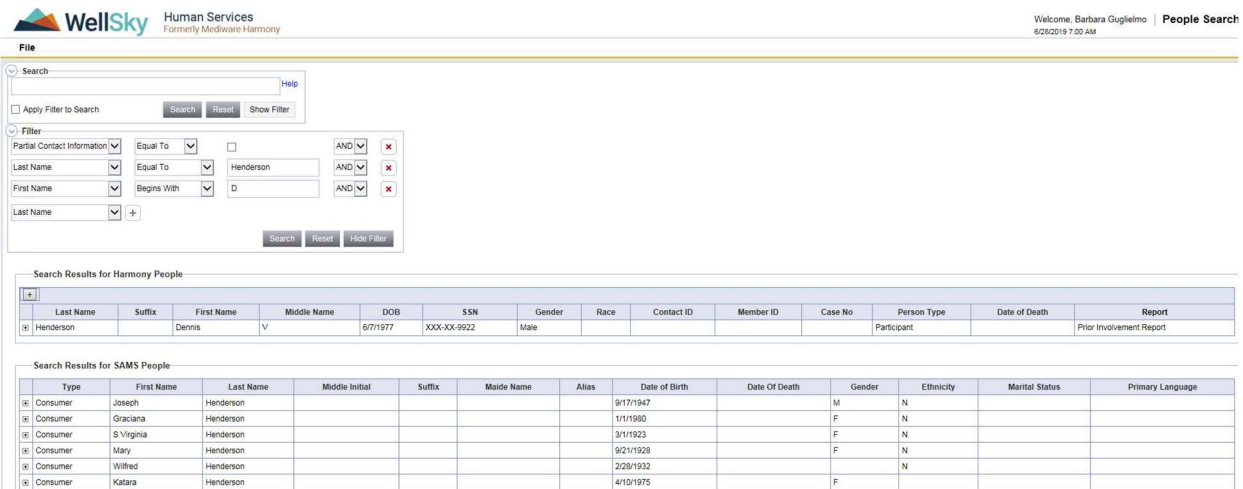
1. Click the **Search** link. The People Search page opens.



People Search window

2. Type the search value in the Search bar and click **Search**. You can search based on any of the information listed below. For example, you can search by last name or phone number to find a record.
 - First Name
 - Middle name
 - Last Name
 - Street
 - Street2
 - City
 - State
 - Zip Code

- County
 - Phone
 - Phone Extension
 - Gender
 - Race
 - Ethnicity
 - Identifier Value (SSN)
 - Email Address
3. The search results display in two list view grid. The first grid identifies people that are in the WellSky database. The second grid identifies people that are in the SAMS database.



The screenshot shows the WellSky Human Services interface. At the top, there is a search bar and a filter section. The filter section includes options for 'Partial Contact Information', 'Last Name', 'First Name', and 'Last Name' with various operators like 'Equal To' and 'Begins With'. Below the filter section, there are two data grids. The first grid is titled 'Search Results for Harmony People' and contains one row with the following data: Last Name: Henderson, Suffix: V, First Name: Dennis, Middle Name: V, DOB: 6/7/1977, SSN: XXX-XX-9922, Gender: Male, Race: , Contact ID: , Member ID: , Case No: , Person Type: Participant, Date of Death: , Report: Prior Involvement Report. The second grid is titled 'Search Results for SAMS People' and contains six rows of data with columns: Type, First Name, Last Name, Middle Initial, Suffix, Maide Name, Alias, Date of Birth, Date Of Death, Gender, Ethnicity, Marital Status, and Primary Language.

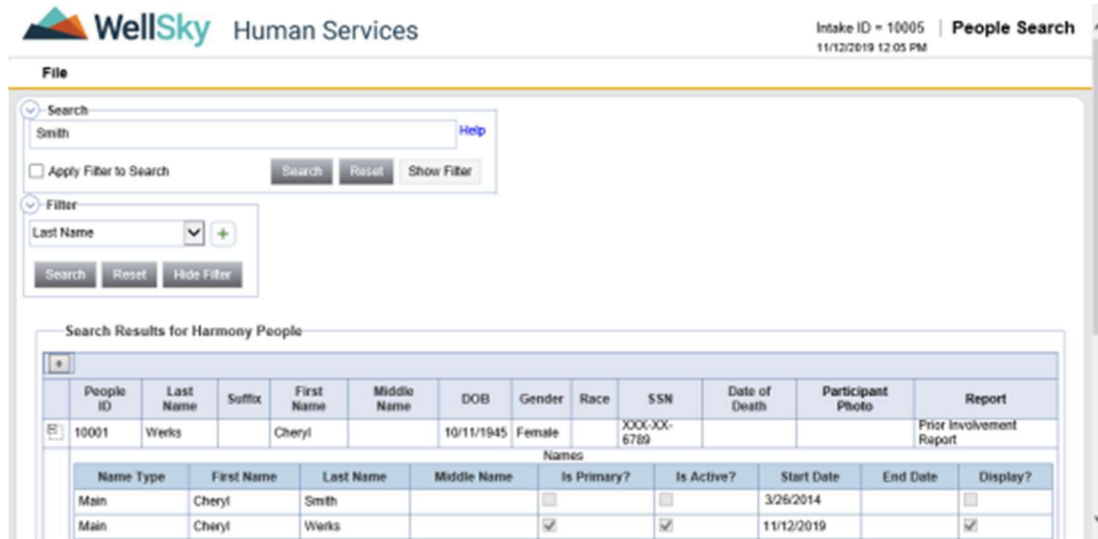
[People Search Page](#)



Note:

If a person is selected from the SAMS grid, it will create a people record in WellSky. The next time a search is conducted on that person, their people record will display in the Harmony (WellSky) grid.

4. Use the expansion icon (+) in the list view grid to view additional information.



File

Intake ID = 10005 | People Search
11/12/2019 12:05 PM

Search
Smith [Help](#)

Apply Filter to Search

Filter
Last Name

Search Results for Harmony People

People ID	Last Name	Suffix	First Name	Middle Name	DOB	Gender	Race	SSN	Date of Death	Participant Photo	Report
10001	Werks		Cheryl		10/11/1945	Female		XXX-XX-6789			Prior Involvement Report

Names

Name Type	First Name	Last Name	Middle Name	Is Primary?	Is Active?	Start Date	End Date	Display?
Main	Cheryl	Smith		<input type="checkbox"/>	<input type="checkbox"/>	3/26/2014		<input type="checkbox"/>
Main	Cheryl	Werks		<input checked="" type="checkbox"/>	<input checked="" type="checkbox"/>	11/12/2019		<input checked="" type="checkbox"/>

People Search Page

Note: Use the expansion grid to see all matching names. The search results initially show the person’s name that is marked as Primary, as visible in the expansion grid.

In the example shown above, the search results show a person named “Cheryl Werks.” The expansion grid shows another associated name, “Cheryl Smith.” This people record includes both names, but the primary name is the one first displayed.

- To further filter the search results, select the Apply Filter to Search option in the Search section and build your filters in the Filter section.
- If the results return a matching record, click to select it in the list view. A popup message will appear.

Overwrite Participant Data: Data on the Caller record will be replaced with data from the selected people record.

Link to Participant: Empty fields on the Caller record will be populated with data from the selected people record and then will be appended to the selected people record.

How would you like to proceed?

Overwrite Participant Data

Link to Participant

Cancel and Return to People Search Grid

The feature allows you to determine how you will use the matching record.

- Overwrite Participant Data** — The people record will be copied into the participant record and will overwrite any data already captured in the record. The Name, Address, and Email that are flagged as Active and Display along with the DOB, Gender, Race, SSN, and Ethnicity, will populate the participant record. The phone

number with the phone type of Home1, Work, Cell phone that are flagged as primary and active will also populate the participant record. This is the default setting.

- **Link to Participant** -- Use this option when the caller has participant information that is not already listed in the people record. The people record will be linked to the participant record. Data already entered into the participant record will not be overwritten with the data from the people record, but the People ID will be linked to the participant record and the data will be appended to the people record.

The record may contain more information than you see in the search results, but all available participant information will be available in the saved Call record.

Overview of PCOC Process

The screening process can be completed in two ways: the self-selection method via the web online assessment form or within the WellSky Human Services solution.

Online Self-Assessment



Role: Prospective Consumer and/or Caller on behalf of the Prospective Consumer

From the PCOC website, the prospective consumer and/or caller will click on the link to the self-assessment.

Contact Information

1. Indicate if filling out the form for self OR for another individual.

MyOptionsRI LTSS Needs Self-Assessment

If you or someone you care for is an older adult or a person living with a disability, this assessment questionnaire will help identify any long-term care needs and the options for services and supports in Rhode Island that could help meet them. The results of the assessment will also tell you if you qualify for more in-depth person-centered options counseling (PCOC) and how to connect for this important service with a long-term services and supports (LTSS) specialists. PCOC will give you the chance to discuss your needs and goals with a specialist trained in LTSS. If your situation requires assistance right away, please call the POINT at (401)462-4444. If you are Medicaid eligible, living in a nursing home and would like assistance leaving, please contact the Nursing Home Transition Program at (401)462-6393 or by email at OHHS.OCP@ohhs.ri.gov.

Required questions are marked with a red **required** label.

CONTACT INFORMATION

Please select one of the following options:

Unanswered

I am completing this form for myself.

I am completing this form for another individual.

[Online Self-Assessment Page](#)

Self

2. When **I am completing this form for myself** is checked, questions will display.

CONTACT INFORMATION

Please select one of the following options:

- Unanswered
 I am completing this form for myself.
 I am completing this form for another Individual.

Information for the Person

First Name required

Middle Initial

Last Name required

Date of Birth
 ☰

Race

Unanswered
 Asian
 Black or African American
 American Indian/Alaska Native
 Native Hawaiian/Pacific Islander
 White
 Some Other Race

What is your preferred language? ☑

Would you like to have a person who speaks your preferred language help you at no cost when you are contacted by the office?

Unanswered
 Yes
 No

Street Address

Address #2

City

State

Zip Code

Preferred Method of Contact

Unanswered
 Phone
 Email
 I do not wish to be contacted

Contact Information Section: Self

Caller

3. If **I am completing this form for another individual** is checked, these questions will display for the caller to complete.

CONTACT INFORMATION

Please select one of the following options:

Unanswered
 I am completing this form for myself.
 I am completing this form for another individual.

Submitter Information

Your First Name required
 Enter response...

Your Last Name required
 Enter response...

Relationship to the Person you are contacting us about

Unanswered
 Caregiver
 Church
 Community Organization
 Physician/Provider
 Police
 Relative/Friend
 Request to be Anonymous
 Self

Your Preferred Method of Contact required

Unanswered
 Phone
 Email
 I do not wish to be contacted

Information for the Person

First Name required
 Enter response...

Middle Initial
 Enter response...

Last Name required
 Enter response...

Date of Birth
 Enter response... 📅

Gender

Unanswered
 Male
 Female
 Gender Non-Conforming
 Trans Female
 Trans Male
 Client Refused

Race

Unanswered
 Asian
 Black or African American
 American Indian/Alaska Native
 Native Hawaiian/Pacific Islander
 White
 Some Other Race

Street Address
 Enter response...

Address #2
 Enter response...

City
 Enter response...

State
 Enter response...

Zip Code
 Enter response...

Preferred Method of Contact

Unanswered
 Phone
 Email
 I do not wish to be contacted

Contact Information for Caller & Prospective Consumer

Information on Prospective Consumer

The subsequent sections of the assessment are recording information about the Prospective Consumer.

Are you or the person you are contacting us about:

A Rhode Island resident who lives in the state more than 1/2 a year? **required**

- Unanswered Yes No but plan on becoming a resident
 No

A youth with an intellectual/developmental disability or a serious, chronic and disabling condition who is turning age 19 or 21? **required**

- Unanswered Yes No Unknown

Expected to need health care services and supports for a period that is likely to last more than a month?

- Unanswered No Yes

Have any of the following health conditions, illnesses or disabilities caused this need for services and supports: **required**

All / None

- | | | |
|---------------------------------------------------------------------------------------------|---------------------------------------------------------------------------------------------------------------------------------------------------------|-----------------------------------------------------------------------------------------------------------------------------------------------|
| <input type="checkbox"/> A COVID infection and treatment | <input type="checkbox"/> Accident or injury requiring medical treatment (e.g., broken limbs, pneumonia, accident injuries) | <input type="checkbox"/> A chronic medical condition (e.g., heart disease, diabetes, cancer, asthma, stroke, MS) |
| <input type="checkbox"/> An intellectual/developmental disability (occurring before age 18) | <input type="checkbox"/> Physical condition or disability affecting mobility or functioning (e.g., para or quadraplegic, neuromuscular disability, etc) | <input type="checkbox"/> Substance use disorder (e.g., alcohol, Rx abuse, illegal drugs) |
| <input type="checkbox"/> Memory loss (alzheimer's, dementia) | <input type="checkbox"/> Acquired traumatic brain injury (over age 18) | <input type="checkbox"/> Serious and persistent behavioral health condition (e.g., depression, bi-polar, compulsive disorders, schizophrenia) |
| | | <input type="checkbox"/> None |

Receive any of the following care within the last month: All / None

- | | | |
|------------------------------------------------------------------------------------------|----------------------------------------------------------|--------------------------------------------------------------------------|
| <input type="checkbox"/> Treatment of a wound or pressure ulcer by a health professional | <input type="checkbox"/> At home health care | <input type="checkbox"/> Daily monitoring by a skilled nurse (LPN or RN) |
| <input type="checkbox"/> Physical Therapy and/or occupational therapy | <input type="checkbox"/> In patient psychiatric care | <input type="checkbox"/> Treatment with IV medication |
| | <input type="checkbox"/> Hospital stay of 3 days or more | <input type="checkbox"/> Treatment for a substance use disorder |

Experience a fall within the last month

- Unanswered No Yes

Are you or the person you are contacting us about currently living in a nursing home and would like assistance leaving the nursing home?

- Unanswered Yes No

HEALTH COVERAGE

Health Insurance Information: Do you or the person you are contacting us about have any of the following types of health coverage? Please check all that apply. *required* All / None

- | | | |
|-------------------------------------------------------|------------------------------------------------------------------|--------------------------------------------------------|
| <input type="checkbox"/> VA Health Coverage | <input type="checkbox"/> Medicare | <input type="checkbox"/> Private or Employer Insurance |
| <input type="checkbox"/> HealthSource RI Plan | <input type="checkbox"/> Rhody Health Partners or Rite Care Plan | <input type="checkbox"/> Medicaid All Other |
| <input type="checkbox"/> Medicaid Application Pending | <input type="checkbox"/> Uninsured | <input type="checkbox"/> Medicaid LTSS |
| | | <input type="checkbox"/> Unknown |

FINANCIAL INFORMATION

Do you or the person you are contacting us about receive any of the following? *required* All / None

- | | | |
|--------------------------------------------------------------------------------|-------------------------------------------------------------|----------------------------------------------------------------|
| <input type="checkbox"/> Social Security Disability Insurance (SSDI) | <input type="checkbox"/> Supplemental Security Income (SSI) | <input type="checkbox"/> Veterans Administration (VA) Benefits |
| <input type="checkbox"/> Retirement, Survivors and Disability Insurance (RSDI) | <input type="checkbox"/> Other | <input type="checkbox"/> None |
| | <input type="checkbox"/> Pension or Retirement Plan | |

Which of the following best describes the income you/the person have on a monthly basis? *required*

- | | | |
|---------------------------------------------------------|-------------------------------------------------|---------------------------------------------------------|
| <input checked="" type="radio"/> Unanswered | <input type="radio"/> Less than \$2,300 / month | <input type="radio"/> Between \$2,300 - \$4,500 / month |
| <input type="radio"/> Between \$4,500 - \$8,500 / month | <input type="radio"/> Over \$8,500 / month | <input type="radio"/> Unknown |

Are you or the person you are contacting us about married? If so, and tell us the combined total resources/assets of both spouses when responding to the question below.

- Unanswered Yes No

LIVING ARRANGEMENT

Which of the following best describes where you/the person live(s) now? *required*



If you/the person reside(s) in a home-like setting (house, apartment, condo, etc.), which of the following best describes who else lives there?

- | | | |
|------------------------------------------------|-----------------------------------------------|--------------------------------------------|
| <input checked="" type="radio"/> Unanswered | <input type="radio"/> No one, live alone | <input type="radio"/> Spouse/partner only |
| <input type="radio"/> Spouse/partner and Child | <input type="radio"/> Sibling(s) | <input type="radio"/> Adult child/children |
| <input type="radio"/> Minor child/children | <input type="radio"/> Other relatives/friends | |

ASSISTANCE WITH DAILY ACTIVITIES

Instructional Text

In this section, we would like to know more about the areas of daily life where some type of assistance may be needed by you or the person you are contacting us about.

Do you/the person need help on most days with any of the following: (Check all that apply)

Bathing (e.g., getting in and out of a shower/tub, using faucets, hair/body toweling)

Yes No

Dressing (e.g., putting on/taking off clothes, socks, shoes, or stockings)

Yes No

Toileting (e.g., getting on or off the toilet, wiping, or changing pads)

Yes No

Eating (e.g., eat, drink, using utensils, chewing/swallowing)

Yes No

Grooming (e.g., brushing teeth, combing hair, shaving, cutting nails)

Yes No

Managing Medications (e.g., filling prescriptions, taking pills/medicines as directed, keeping meds organized)

Yes No

Moving About (e.g., going from room to room or outside and back in without a walker or other assistive device)

Yes No

Physical transitions (e.g., getting up from or moving between a bed, a chair/wheelchair, or toilet without help)

Yes No

Housekeeping (e.g., general cleaning, dusting/vacuuming, washing dishes)

Yes No

Preparing Meals (e.g., planning, cooking, serving and clean-up)

Yes No

Shopping (e.g., grocery, clothes, prescriptions)

Laundry (e.g., using washer/dryer, folding, putting laundry away)

Yes No

Handling Mail (e.g., opening, reading, responding)

Yes No

Managing Money (e.g., keeping accounts, paying bills, handling cash)

Yes No

Assistive Devices [All / None](#)

Uses a Cane

Rollator

Uses a walker

Wheel-chair reliant

Needs assistance moving

Other

Falls or is at risk of falling

4. At the end of the form, click **Submit**.

By checking this box, I hereby authorize the use or disclosure of my protected health information as described above.

Yes No



Thank you for completing the LTSS needs assessment questionnaire. Click "Submit" to receive the results and find out more about contacting an LTSS specialist for person-centered options counseling. If you would prefer not to submit the questionnaire, click "Cancel".



✓ Submit

✗ Cancel

Print

[Online Self-Assessment Page](#)

5. A message will display on the screen, letting the individual know that the submission was successful. A record number is provided for their reference. The message allows you the option to return to the RI EOHHS website or print the information submitted.

Success!

Please keep this reference number for your records: **10667**

[Return to Rhode Island EOHHS](#)

Print

Success Message

Online Self-Assessment Submission

PCOC Supervisors will be monitoring online submissions and assigning PCOC Counselors to follow up with the prospective consumer and/or caller.



Role: PCOC Supervisor

1. After logging into WellSky, click on the Calls Chapter.

My Work Calls Providers Reports   

WellSky Chapters

2. Redefine the Advanced Search filter by selecting Call Method.

File

Filters

Division

Equal To

PCOC

AND

✕






+

Division
 Call ID
 Call Date
 Call Time
 Type of PCOC
Call Method
 Caller
 Overall Status
 Task Status
 Intake Worker
 Caller First Name
 Caller Last Name
 First Name
 Last Name
 PCOC Counselor
 PCOC Counselor
 Checked Out By
 Caller First Name
 Caller Last Name

Search

Reset

record(s) returned - now viewing 1 through 15

Call ID	Call Date	Call Time	Call Method	Overall Status	Task Status	Caller Name	Consumer	PCOC C
0901	06/08/2022	3:26 PM	Telephone	Open	Pending Initial Call with the Consumer	Springtime,Sandra	Springtime,Sandra	Lauro,Gir
0900	06/08/2022	2:54 PM	Web Intake	Open	Reached Consumer, Scheduled Call to Discuss Options		Maxwell,Maisie	Lauro,Gir
0898	06/03/2022	9:22 AM	Web Intake	Pending	Pending		Self,Susie	
0891	05/19/2022	10:28 AM	Web Intake	Pending	Pending		TestReferral,Diane H	
0890	05/12/2022	11:38 AM	Web Intake	Pending	Pending		Martin,Michael R	
0889	05/10/2022	4:58 PM	Web Intake	Open	Pending Initial Call with the Consumer	Test,gordon		Applicati
PCOC 10880	04/27/2022	1:07 PM	Web Intake	Pending	Pending		Jutras,Elaine J	
PCOC 10875	04/14/2022	3:32 PM	Telephone	Open	Pending Initial Call with the Consumer	Mays,Molly	Mays,Margaret	Lauro,Gir
 PCOC 10871	04/12/2022	2:59 PM	Telephone	Open	Pending Initial Call with the Consumer	Qwerty ,Jack X		Peloquin,
 PCOC 10870	04/06/2022	11:09 AM	Telephone	Open	Pending Initial Call with the Consumer	Templeton ,John W		Peloquin,
 PCOC 10867	04/01/2022	2:39 PM	Telephone	Open	Pending Initial Call with the Consumer	Shoop,Aloop	Shoop,Aloop	Marcello,
 PCOC 10862	04/01/2022	2:00 PM	Telephone	Complete	Closed	Morone ,Sally	Morone,SueEllen	Peloquin,
 PCOC 10866	04/01/2022	1:59 PM	Telephone	Complete	Closed	Cookie,Carrie	Cookie,Carrie	Stabile,Lc

[Calls Advanced Search Filter](#)

3. Click on the + plus sign.
4. Select **Web Intake** from the dropdown list and click **Search**.

Page 35 | 92

File

Filters

Division Equal To PCOC AND

Call Method Equal To Web Intake AND

Division

47 Queue Search record(s) returned - now viewing 1 through 15

Division	Call ID	Call Date	Call Time	Call Method	Overall Status	Task Status	Caller Name	Consumer
PCOC	10900	06/08/2022	2:54 PM	Web Intake	Open	Reached Consumer, Scheduled Call to Discuss Options		Maxwell, Maisie
PCOC	10898	06/03/2022	9:22 AM	Web Intake	Pending	Pending		Self, Susie
PCOC	10891	05/19/2022	10:28 AM	Web Intake	Pending	Pending		TestReferral, Diane H
PCOC	10890	05/12/2022	11:38 AM	Web Intake	Pending	Pending		Martin, Michael R
PCOC	10889	05/10/2022	4:58 PM	Web Intake	Open	Pending Initial Call with the Consumer	Test, gordon	
PCOC	10880	04/27/2022	1:07 PM	Web Intake	Pending	Pending		Jutras, Elaine J
PCOC	10836	03/31/2022	11:12 AM	Web Intake	Pending	Pending		Stephens, Michael W
PCOC	10827	03/31/2022	9:02 AM	Web Intake	Pending	Pending		Pollan, Travis W
PCOC	10826	03/31/2022	8:50 AM	Web Intake	Pending	Pending		Smith, Betsy S
PCOC	10825	03/31/2022	8:33 AM	Web Intake	Pending	Pending		Locke, Fred E
PCOC	10824	03/29/2022	10:53 PM	Web Intake	Pending	Pending		Consumer Last, Consumer First Consumer Mik
PCOC	10823	03/24/2022	10:28 AM	Web Intake	Pending	Pending		Sedky, Elaine M

Call Records Results



Note

Another indicator that a record needs a PCOC Counselor assigned is the PCOC Counselor field is blank. The filter can be modified by selecting PCOC Counselor Equal to Blank.

- The results will display with the latest online self-assessment. Click on the record to open.
- Select **Check Out Call** from File menu.

File Tools Reports Word Merge

History
Spell Check
Check Out Call
Print
Close Call

Associated Calls
Referrals
Events
Track Call Status

Information

PCOC	
Initial Contact *	06/24/2022
of Initial Contact *	10:59 AM
and Screening Worker *	
Call Date *	06/24/2022
Call Time	10:59 AM
Call Method	Web Intake
Type of PCOC *	Intake/Screening
How did you hear about us?	
In a crisis situation requiring immediate health care assistance?	<input type="checkbox"/>

Reason for Call

Details of Call

Decision

Overall Status *	Pending *
Task Status *	Pending

Comments

PCOC Counselor

PCOC Provider

Call Details Page

7. Click **OK**.



Message Window

- 8. Click on the Participants subpage.
- 9. From the Participant list grid, click on a participant.

File Add Participant

Call

Participants

Documentation

Notes

Associated Calls

Events

Track Call Status

Filters

Last Name

1 Participants record(s) returned - now viewing 1 through 1

Last Name	First Name	Relationship to Prospective Consumer	Contact Type	City	State	Zip Code	Home Phone	Work Phone	Email	Age
Marshall	Stella		Consumer	Jamestown	Rhode Island					

First Previous Records per page 15 Next Last

Participant List Page

10. Select Search for Person from the Tools Menu.

WellSky Human Services

Call ID = 10980 - Helen Ward **Consumer**
Last Updated by Admin
at 6/24/2022 10:59:45 AM

File Tools Reports

Consum

Upload Photo

Search For Person

Search For Person

First Name Helen

Middle Initial L

Last Name Ward

Click Search for Person from Tools Menu

11. The People Search window will display.

WellSky Human Services

Call ID = 10729 - Stella Marshall **People Search**
8/3/2021 4:04 PM

File

Search

Apply Filter to Search

Filter

Last Name Begins With AND

First Name Begins With AND

Last Name

People Search

12. Click **Search**.

13. If no results return, Select **Close People Search** from the File menu.

14. If results return, verify that the people record in the grid is the same person. If so, click on the name in the results grid.

WellSky Human Services

Call ID = 10729 - Stella Marshall **People Search**
8/3/2021 4:04 PM

File

Search

Apply Filter to Search

Filter

Last Name Begins With AND

First Name Begins With AND

Last Name

Search Results for Harmony People

Last Name	People ID	First Name	Middle Name	Suffix	DOB	Gender	Race	SSN	Contact ID	Member ID	Case No	Person Type	Date of Death	Participant Photo
Marshall	10028	Stella				Female	White					Participant		

Overwrite Participant Data: Data on the Consumer record will be replaced with data from the selected people record.

Link to Participant: Empty fields on the Consumer record will be populated with data from the selected people record and then will be appended to the selected people record.

How would you like to proceed?

Overwrite Participant Data

Link to Participant

Cancel and Return to People Search Grid

People Search

The feature allows you to determine how you will use the matching record.

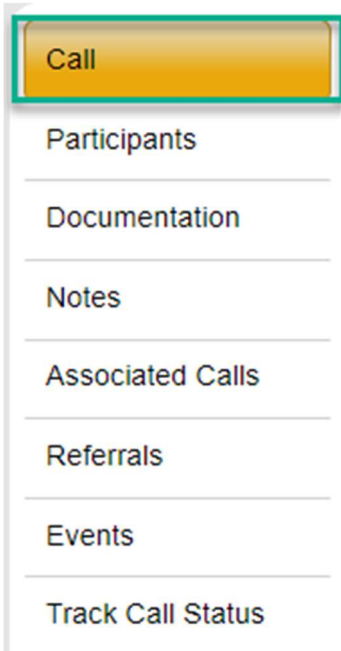
- a. **Overwrite Participant Data** — The people record will be copied into the participant record and will overwrite any data already captured in the record. The Name, Address, and Email that are flagged as Active and Display along with the DOB, Gender, Race, SSN, and Ethnicity, will populate the participant record. The phone number with the phone type of Home1, Work, Cell phone that are flagged as primary and active will also populate the participant record. This is the default setting.
- b. **Link to Participant** -- Use this option when the caller has participant information that is not already listed in the people record. The people record will be linked to the participant record. Data already entered into the participant record will not be overwritten with the data from the people record, but the People ID will be linked to the participant record and the data will be appended to the people record.

15. Make a selection and click **OK**.

16. From the Call Participant Details page, Select **Save and Close (Caller, Consumer or Other Contact)** from the File menu.

17. Repeat steps 9-15 for other call participants.

18. Click on the Call Subpage.



Call Subpages

19. On the Call Details page, complete the following:

Call Information	
Division	PCOC
Date of Initial Contact *	03/31/2022
Time of Initial Contact *	09:15 AM
Intake and Screening Worker *	
Call Date *	03/31/2022
Call Time	09:15 AM
Call Method	
Type of PCOC *	
How did you hear about us?	
In a crisis situation requiring immediate health care assistance?	<input type="checkbox"/>
Reason for Call	
Details of Call	
Decision	
Overall Status *	
Task Status *	
Comments	
PCOC Counselor	Kranovich, Dan
PCOC Provider	

Call Details Page

- a. **Intake and Screening Worker:** Select the **Web Intake, Worker** from dropdown list.
- b. **PCOC Counselor:** Select the worker from dropdown list.
- c. **PCOC Provider:** Select the Agency from the dropdown list.

20. Select **Save, Check In and Close Call** from File menu.

Note

Assigned PCOC Counselor will see the Web Intake Submission on their Call Records grid when they navigate to the Calls Chapter. Refer to section, **Online Self-Assessment Record and PCOC Process**, page 52.



Practice #1 Exercise



Practice Exercise #1

1. Complete an online self-assessment.
2. Open the Web Intake record from the Calls Chapter.
3. Assign record to a worker.

Add Call in WellSky

PCOC Staff will enter calls received by logging into WellSky.



Role: PCOC Worker

1. After logging into WellSky, click on the Calls Chapter.









My Work **Calls** Providers Reports   

Click Calls Chapter.

2. Select **Add Call** from the File menu.
3. The Add Call details page will display.

Call Information

- Call Information

Entry Date*	06/28/2021	Entry Time*	6:33 AM
Call Date*	6/28/2021 	Start Time*	06 : 33 AM  
Call Method	<input type="text"/>	End Time*	:  
Intake and Screening Worker*	Guglielmo, Barbara  	Type of PCOC*	<input type="text"/>
Overall Status*	Open 	How did you hear about us?	<input type="text"/>
Confidential	<input type="checkbox"/>		

Add Call > Calls Information

1. This section captures information about the call. Fields with an asterisk * are required.
2. Select a value for the **Call Method**.
3. Select a value for **Type of PCOC**.
4. Select a value for **How did you hear about us?**

Note

Fields with a red asterick *: The field is required.



Confidential/Restricted: When selected, this checkbox makes the record only available to workers whose names are directly associated with the call. System administrators and the supervisors of these workers are also able to open and view the record.

Caller


1. This section captures information on the caller.
2. Click **Search** to add the caller's information.

Caller Search Clear

Click Search for Caller.

- The People Search window will display.
- Enter the name of the caller, by using the Search text box or configuring the filter by First and Last Names. Click **Search**.

People Search Window

- Select a field from the dropdown down and click on the  and enter the value in the text box.
- Once filter is established, click **Search**.

If Results Yield a Match

- The search results display in two list view grid. The first grid identifies people that are in the WellSky database. The second grid identifies people that are in the SAMS database.

Last Name	Suffix	First Name	Middle Name	DOB	SSN	Gender	Race	Contact ID	Member ID	Case No	Person Type	Date of Death	Report
Henderson		Dennis	V	6/7/1977	XXX-XX-9922	Male					Participant		Prior Involvement Report

Type	First Name	Last Name	Middle Initial	Suffix	Maide Name	Alias	Date of Birth	Date Of Death	Gender	Ethnicity	Marital Status	Primary Language
Consumer	Joseph	Henderson					9/17/1947		M	N		
Consumer	Graciana	Henderson					1/1/1980		F	N		
Consumer	S Virginia	Henderson					3/1/1923		F	N		
Consumer	Mary	Henderson					9/21/1928		F	N		
Consumer	Wilfred	Henderson					2/28/1932		N			
Consumer	Katara	Henderson					4/10/1975		F			

People Search Page



Note:

If a person is selected from the SAMS grid, it will create a people record in WellSky. The next time a search is conducted on that person, their people record will display in the Harmony (WellSky) grid.

- Click name in search results grid.

Search
Rodgers

Apply Filter to Search Search Reset Show Filter

Filter:
Partial Contact Information Equal To AND X

Last Name +

Search Reset Hide Filter

Search Results for Harmony People

	Last Name	People ID	First Name	Middle Name	Suffix	DOB	Gender	Race	SSN	Contact ID	Member ID	Case No	Person Type	Date of Death	Participant Photo
<input type="checkbox"/>	Rodgers	10099	Julia			8/3/1949	Female	White	454-51-1554				Participant		
<input type="checkbox"/>	Rodgers	10100	Patrick	L		8/8/1979	Male	White	565-95-9595				Participant		
<input type="checkbox"/>	Rodgers	10174	Sharlene				Female	Black or African American					Participant		
<input type="checkbox"/>	Rodgers	10470	Cecilia	L		12/16/1975	Female	White					Participant		

Click name in search results grid.

7. A message will display.

Overwrite Participant Data: Data on the Caller record will be replaced with data from the selected people record.

Link to Participant: Empty fields on the Caller record will be populated with data from the selected people record and then will be appended to the selected people record.

How would you like to proceed?

Overwrite Participant Data
 Link to Participant
 Cancel and Return to People Search Grid

OK

People Search message displays.

8. Click **OK**. The People Search window will close and return the user to the Add Call page.

9. The information from the individual's People record will display in the Caller's section.

Caller Search Clear

Anonymous

Last Name Middle Initial First Name

Street Copy Address From

Street2

City State Zip Code Clear

Contact Phone

Surrogate Legal Status

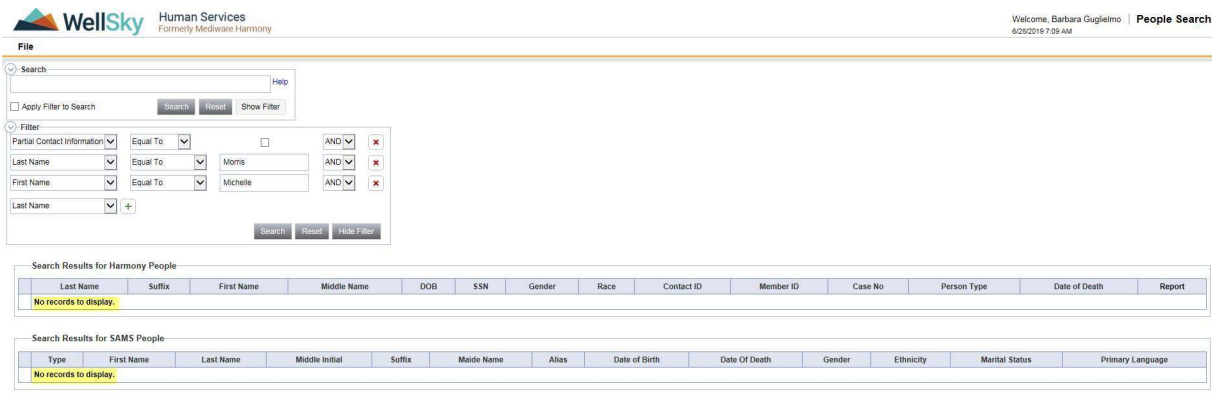
Relationship to Prospective Consumer

Consumer Case:

Language Spoken Interpreter/Translator Needed?

Add Caller>Caller Section

If Results Do Not Yield a Match



WellSky Human Services
Economy. Medians. Harmony.

Welcome, Barbara Guglielmo | People Search
6/28/2018 7:09 AM

File

Search: Help

Apply Filter to Search

Filter:

Partial Contact Information Equal To

Last Name Equal To Morris

First Name Equal To Michelle

Last Name

Search Results for Harmony People

Last Name	Suffix	First Name	Middle Name	DOB	SSN	Gender	Race	Contact ID	Member ID	Case No	Person Type	Date of Death	Report
No records to display.													

Search Results for SAMS People

Type	First Name	Last Name	Middle Initial	Suffix	Maide Name	Alias	Date of Birth	Date Of Death	Gender	Ethnicity	Marital Status	Primary Language
No records to display.												

People Search

10. If your search does not result in any matches, select Close People Search from File menu.



File

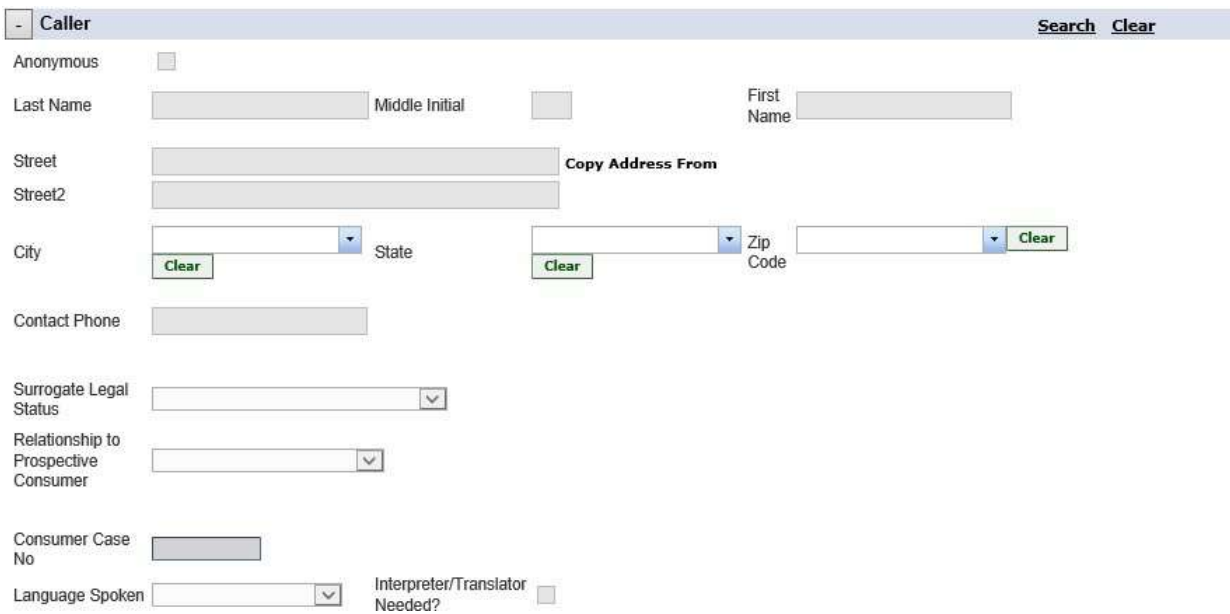
Print

Close People Search

File>Close People Search

11. The People Search window will close and return the user to the Add Call Details page.

12. Complete the necessary information in the section.



Caller

Anonymous

Last Name Middle Initial First Name

Street **Copy Address From**

Street2

City State Zip Code

Contact Phone

Surrogate Legal Status

Relationship to Prospective Consumer

Consumer Case No

Language Spoken Interpreter/Translator Needed?

Add Caller>Caller Section

Prospective Consumer

13. To add a prospective consumer, click **Add**.



To add a prospective consumer, click Add.

Add New Consumer Information
Search [Clear](#)

Primary	<input checked="" type="checkbox"/>		
Caller is Consumer	<input type="checkbox"/>		
Last Name*	<input type="text"/>	Middle Initial	<input type="text"/>
			First Name* <input type="text"/>
Address Type	<input type="text" value="v"/>		
Street	<input type="text"/>	Copy Address From	
Street2	<input type="text"/>		
City	<input type="text" value="v"/> Clear	State	<input type="text" value="v"/> Clear
		Zip Code*	<input type="text" value="v"/> Clear
Contact Phone*	<input type="text"/>	Email Address	<input type="text"/>
Gender*	<input type="text" value="v"/>	Race	<input type="text" value="v"/>
		Ethnicity	<input type="text" value="v"/>
Date of Birth	<input type="text" value="v"/>		Age at Call
Age Estimated	<input type="text" value="v"/>		<input type="text"/>
Surrogate Legal Status	<input type="text" value="v"/>		
Legal Status	<input type="text" value="v"/>		
Marital Status*	<input type="text" value="v"/>		
Language Spoken	<input type="text" value="v"/>	Interpreter/Translator Needed?	<input type="checkbox"/>
Consumer Case No	<input type="text"/>		

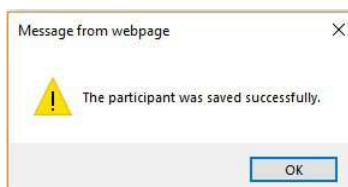
Add Call>Prospective Consumer

14. If the prospective consumer is also the caller, check **Caller is Prospective Consumer**.

15. If not, follow steps 8-17.

16. When complete, select **Save and Close Consumer** from the File menu.

17. A message will display. Click **OK**.



Participant saved successfully.

**Note**

If the consumer is new to the system, you can use the Copy Address From. When selected, a new window will appear with the address of other persons related to the call (Caller, Other Contact). Select an address from the grid. The window will close and the address will appear for the prospective consumer.

Reason for Call

1. Enter reason for call in the Details of Call textbox.
2. If the individual is experiencing a crisis, check the box for **In a crisis situation requiring immediate health care assistance?**

- Reason For Call

Details of Call

In a crisis situation requiring immediate health care assistance?

Contacts

1. To record additional persons, click **Add**.

- Contacts **Add** **Edit** **Delete**

To record additional persons, click Add.

2. Enter the necessary information.

File

Spell Check - Save Contact - Save and Close Contact - Close Contact

Add New Contact Information
[Search](#) [Clear](#)

Last Name	<input type="text"/>	Middle Name	<input type="text"/>	First Name	<input type="text"/>
Address Type	<input type="text" value=""/>				
Street	<input type="text"/>				
Street2	<input type="text"/>				
City	<input type="text"/>	State	<input type="text"/>	Zip Code	<input type="text"/>
	<input type="button" value="Clear"/>		<input type="button" value="Clear"/>		<input type="button" value="Clear"/>
Contact Phone	<input type="text"/>	Email Address	<input type="text"/>		
Relationship to Prospective Consumer	<input type="text" value=""/>				
Case No	<input type="text"/>				

Add Call>New Contact

- When complete, select **Save and Close Contact** from the File menu.

Decision

- No changes are needed in the Decision section.

- Decision

Task Status*	<input type="text" value="Pending Initial Call with the Consumer"/>
Comments	<input style="height: 30px;" type="text"/>
PCOC Counselor*	<input type="text" value="Guglielmo, Barbara"/> <input type="button" value="..."/> <input type="button" value="Clear"/>
Division	<input type="text" value="PCOC"/>

Add Call>Decision

To continue working with the call record:

- When complete, Select **Save, Close and Edit Call** from the File menu.

To submit the call record and work on it in the future:

- When complete, Select **Save, Check In and Close Call** from the File menu.


Note

Do not use the browser window close button (X) to close records. Unsaved changes will be lost and cannot be retrieved.



File menu options from the Add Call page

- **Save** – This option saves any changes to the Call form since the last save. This can be completed at any time while working with the Call form and will not close the Call form.
- **Save and Close** – This option saves any changes to the Call form since the last save and closes it. The Call record is still checked out to the Worker, so no other workers can modify the record until it is checked back in.
- **Save, Close, and Check-In** – This option saves any changes to the Call form since the last save, closes it, and checks in the record. If another worker needs to edit the record, they can check it out.
- **Save, Close, and Edit** – This option saves any changes to the Call form since the last save, closes the form, and opens the record in edit mode.

If continuing to work with the call record:

4. The Call Details page will display.

File	Tools	Reports	Word Merge
Call			
Participants	Call Information		
Documentation	Date of Initial Contact *	12/14/2020	
Notes	Time of Initial Contact *	08:20 AM	
Associated Calls	Intake and Screening Worker *	Guglielmo, Barbara ▼	
Referrals	Call Date *	12/14/2020	
Events	Call Time	08:20 AM	
Track Call Status	Call Method	Telephone ▼	
	Call Type *	Information ▼	
	How did you hear about us?	Hospital Referral ▼	
	Decision		
	Overall Status *	Open ▼*	
	Task Status *	Pending PCOC Follow-Up/Close-Out ▼	
	Comments	<div style="border: 1px solid #ccc; height: 40px;"></div>	
	PCOC Counselor	Guglielmo, Barbara ▼	

Call Details page



For multiple prospective consumers (caller is reporting on their parents), go to page 52.

Practice #2 Exercise



Practice Exercise #2

1. Add a Call record.
2. Complete a People Search for Call Participants.
3. Save Call record.

Online Self-Assessment Record and PCOC Process

Online Self-Assessment records are available in the Calls Chapter. To access the record:

1. Click on the Calls Chapter.



2. Select a record with a Call Method = **Web Intake** from the Call List Grid.

Division	Call ID	Call Date	Call Time	Call Method	Overall Status	Task Status	Caller Name	Consumer	PCOC Counselor	Checked Out By
PCOC	10901	06/08/2022	3:26 PM	Telephone	Open	Pending Initial Call with the Consumer	Springtime,Sandra	Springtime,Sandra	Lauro,Gina	Guglielmo,Barbara
PCOC	10900	06/08/2022	2:54 PM	Web Intake	Open	Reached Consumer, Scheduled Call to Discuss Options		Maxwell,Maisie	Lauro,Gina	Lauro,Gina
PCOC	10898	06/03/2022	9:22 AM	Web Intake	Pending	Pending		Self,Susie	Lauro,Gina	Lauro,Gina



The last column of the grid, **Checked Out By**, lets you know if another worker has the record checked out. If that is the case, you will be able to open the record to view only.

3. The Call Details page will display.
4. Select Check Out Call from File menu.
5. A People Search will need to be completed on the participants. Click OK.

Message to do a People Search

- Click on the Participants subpage.
- From the Participants list page, click on a participant record.

Call ID = 10667 - Charles Russell | **Participants**
7/18/2021 11:53 AM

File Add Participant

Call

Participants

Documentation

Notes

Associated Calls

Events

Track Call Status

Filters

Last Name

Search Reset

1 Participants record(s) returned - now viewing 1 through 1

Last Name	First Name	Relationship to Prospective Consumer	Contact Type	City	State	Zip Code	Home Phone	Work Phone	Email	Age
Russell	Charles		Consumer	Block Island	Rhode Island	02806				63.5

First Previous Records per page 15 Next Last

[Participants List Page](#)

- From the Participants Details page, Select **Search for Person** from the Tools menu.

Call ID = 10667 - Charles Russell | **Consumer**
Last Updated by bguglielmo at 7/18/2021 12:02:01 PM

File Tools Reports

Upload Photo

Consumers

Search For Person

Copy Address From Consumer Search For Person

Middle Initial

Last Name

Address Type

Street

Charles

Edward

Russell

Unknown

123 Corn Neck Road

[Select Search for Person from Tools Menu](#)

- The People Search window will display. The search results display in two list view grid. The first grid identifies people that are in the WellSky database. The second grid identifies people that are in the SAMS database. Click Search.

Call ID = 10667 - Charles Russell | **People Search**
7/18/2021 11:59 AM

File

Search

Apply Filter to Search Search Reset Show Filter

Filter

Last Name Begins With Russell AND X

People ID Equal To 11290 AND X

First Name Begins With Charles AND X

Middle Name Begins With Edward AND X

DOB Equal To 01/17/1958 AND X

Race Equal To American Indian/Alaska Native AND X

Partial Contact Information Equal To AND X

Phone Equal To (401)244-8444 AND X

Address Type Equal To Unknown AND X

Street Equal To 123 Corn Neck Road AND X

City Equal To Block Island AND X

State Equal To Rhode Island AND X

Zip Code Equal To 02806 AND X

Last Name +

Search Reset Hide Filter

[People Search Page](#)

If Results Yield No Match

- If no records return, Click **Close People Search** from File menu.

File

Print
Close People Search

Apply Filter to Search Search Reset Show Filter

Filter

Last Name	Begins With	Russell	AND	X
People ID	Equal To	11290	AND	X
First Name	Begins With	Charles	AND	X
Middle Name	Begins With	Edward	AND	X
DOB	Equal To	01/17/1958	AND	X
Race	Equal To	American Indian/Alaska Native	AND	X
Partial Contact Information	Equal To	<input type="checkbox"/>	AND	X
Phone	Equal To	(401)244-8444	AND	X
Address Type	Equal To	Unknown	AND	X
Street	Equal To	123 Corn Neck Road	AND	X
City	Equal To	Block Island	AND	X
State	Equal To	Rhode Island	AND	X
Zip Code	Equal To	02806	AND	X
Last Name				

Search Reset Hide Filter

Search Results for Harmony People

Last Name	People ID	First Name	Middle Name	Suffix	DOB	Gender	Race	SSN	Contact ID	Member ID	Case No	Person Type	Date of Death	Participant Photo
No records to display														

People Search Page

10. Select **Save and Close Consumer (or Caller)** from File menu.

If Results Yield a Match

10. The search results display in two list view grid. The first grid identifies people that are in the WellSky database. The second grid identifies people that are in the SAMS database.

WellSky Human Services
Formerly Medeward Harmony

Welcome, Barbara Guglielmo | People Search
6/25/2019 7:00 AM

File

Search

Apply Filter to Search Search Reset Show Filter

Filter

Partial Contact Information	Equal To	<input type="checkbox"/>	AND	X
Last Name	Equal To	Henderson	AND	X
First Name	Begins With	D	AND	X
Last Name				

Search Reset Hide Filter

Search Results for Harmony People

Last Name	Suffix	First Name	Middle Name	DOB	SSN	Gender	Race	Contact ID	Member ID	Case No	Person Type	Date of Death	Report
Henderson		Dennis	V	6/7/1977	XXX-XX-9922	Male					Participant		Prior Involvement Report

Search Results for SAMS People

Type	First Name	Last Name	Middle Initial	Suffix	Maide Name	Alias	Date of Birth	Date Of Death	Gender	Ethnicity	Marital Status	Primary Language
Consumer	Joseph	Henderson					9/17/1947		M	N		
Consumer	Graciana	Henderson					1/1/1960		F	N		
Consumer	S Virginia	Henderson					3/1/1923		F	N		
Consumer	Mary	Henderson					9/21/1928		F	N		
Consumer	Wilfred	Henderson					2/28/1932			N		
Consumer	Katara	Henderson					4/10/1975		F			

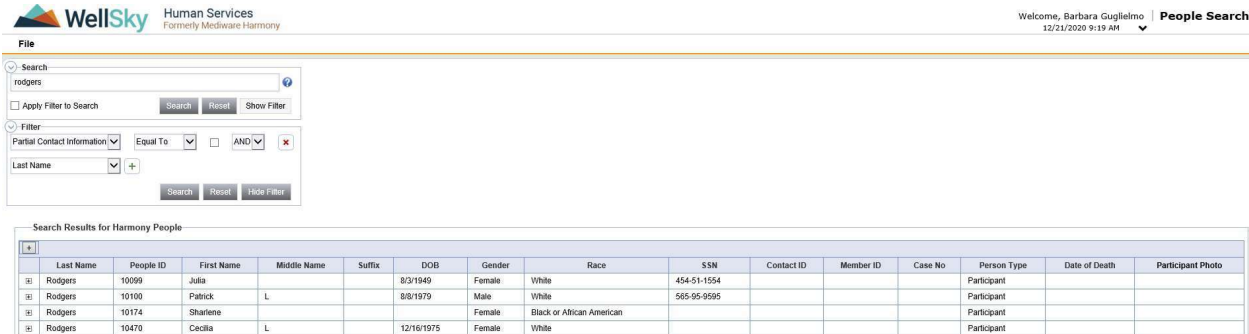
People Search Page



Note:

If a person is selected from the SAMS grid, it will create a people record in WellSky. The next time a search is conducted on that person, their people record will display in the Harmony (WellSky) grid.

11. Click name in search results grid.

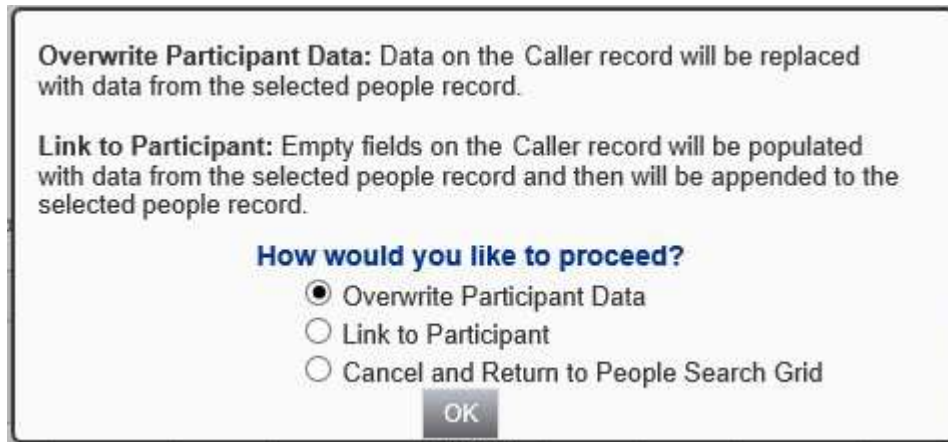


The screenshot shows the WellSky Human Services interface. At the top, it says 'WellSky Human Services Formerly Medicare Harmony'. On the right, it says 'Welcome, Barbara Guglielmo | People Search 12/21/2020 9:19 AM'. Below the header is a search bar with 'rogers' entered. There are buttons for 'Search', 'Reset', and 'Show Filter'. Below the search bar is a filter section with 'Partial Contact Information' selected, 'Equal To' chosen, and 'AND' selected. There is a 'Last Name' dropdown menu with a plus sign. Below the filter section are buttons for 'Search', 'Reset', and 'Hide Filter'. Below the filter section is a table titled 'Search Results for Harmony People'.

Last Name	People ID	First Name	Middle Name	Suffix	DOB	Gender	Race	SSN	Contact ID	Member ID	Case No	Person Type	Date of Death	Participant Photo
Rodgers	10099	Julia			8/3/1949	Female	White	454-51-1554				Participant		
Rodgers	10100	Patrick	L		8/8/1979	Male	White	565-95-9595				Participant		
Rodgers	10174	Sharlene				Female	Black or African American					Participant		
Rodgers	10470	Cecilia	L		12/16/1975	Female	White					Participant		

Click name in search results grid.

18. A message will display.



The screenshot shows a dialog box with the following text:

Overwrite Participant Data: Data on the Caller record will be replaced with data from the selected people record.

Link to Participant: Empty fields on the Caller record will be populated with data from the selected people record and then will be appended to the selected people record.

How would you like to proceed?

 Overwrite Participant Data

 Link to Participant

 Cancel and Return to People Search Grid

OK

People Search message displays.

19. If only partial information was provided from the web form and the existing record is more comprehensive, select **Overwrite Participant Data**.
20. If the information provided from the web form is different than the information in the existing record, select **Link to Participant**.
21. The People Search window will close and return you to the Participant Details page.
22. Select **Save and Close Consumer (or Caller)** from File menu.

Intake and Screening Tool

1. Click on **Documentation** to open the screening tool.
2. Select the **Intake and Screening Tool** from the list view grid.

File

Call

Participants

Documentation

Notes

Associated Calls

Events

Track Call Status

Filters

Participant +

Search Reset


1 Documentation record(s) returned - now viewing 1 through 1

Document Date	Document Name	Document By	Status	Participant
07/16/2021	Intake & Screening Tool	Application, Harmony	Pending	

First Previous Records per page 15 Next Last

[Documentation list page](#)

3. The Intake and Screening Tool will display.

 WellSky Human Services

Call ID = 10667 - Charles Russell | **Documentation**
Last Updated by Admin
at 7/16/2021 8:40:06 AM

File

Intake & Screening Tool

Call Documentation

Document Date * 07/16/2021

Doc. By * Application, Harmony

Doc Name * Intake & Screening Tool

Status * Pending

Participant

Show Consumer

[Intake & Screening Tool](#)

4. Select a participant from the Participant dropdown list.
5. Review the information provided.

CONSUMER STATUS

Are you or the person you are contacting us about:

A Rhode Island resident who lives in the state more than 1/2 a year?*	Yes		
A youth with an intellectual/developmental disability or a serious, chronic and disabling condition who is turning age 19 or 21?*	No		
Expected to need health care services and supports for a period that is likely to last more than a month?	No		
Have any of the following health conditions, illnesses or disabilities caused this need for services and supports:*	<table border="1"> <tr> <td> <ul style="list-style-type: none"> A COVID infection and treatment Accident or injury requiring medical treatment A chronic medical condition (e.g. heart disease) An intellectual/developmental disability (occurs) Physical condition or disability affecting mobility Substance use disorder (e.g., alcohol, Rx abuse) Serious and persistent behavioral health condition </td> <td> <ul style="list-style-type: none"> Memory loss (alzheimer's, dementia) </td> </tr> </table>	<ul style="list-style-type: none"> A COVID infection and treatment Accident or injury requiring medical treatment A chronic medical condition (e.g. heart disease) An intellectual/developmental disability (occurs) Physical condition or disability affecting mobility Substance use disorder (e.g., alcohol, Rx abuse) Serious and persistent behavioral health condition 	<ul style="list-style-type: none"> Memory loss (alzheimer's, dementia)
<ul style="list-style-type: none"> A COVID infection and treatment Accident or injury requiring medical treatment A chronic medical condition (e.g. heart disease) An intellectual/developmental disability (occurs) Physical condition or disability affecting mobility Substance use disorder (e.g., alcohol, Rx abuse) Serious and persistent behavioral health condition 	<ul style="list-style-type: none"> Memory loss (alzheimer's, dementia) 		
Receive any of the following care within the last month:	<table border="1"> <tr> <td> <ul style="list-style-type: none"> Treatment of a wound or pressure ulcer by a professional Daily monitoring by a skilled nurse (LPN or RN) Physical Therapy and/or occupational therapy In patient psychiatric care Treatment with IV medication Hospital stay of 3 days or more Treatment for a substance use disorder </td> <td> <ul style="list-style-type: none"> At home health care </td> </tr> </table>	<ul style="list-style-type: none"> Treatment of a wound or pressure ulcer by a professional Daily monitoring by a skilled nurse (LPN or RN) Physical Therapy and/or occupational therapy In patient psychiatric care Treatment with IV medication Hospital stay of 3 days or more Treatment for a substance use disorder 	<ul style="list-style-type: none"> At home health care
<ul style="list-style-type: none"> Treatment of a wound or pressure ulcer by a professional Daily monitoring by a skilled nurse (LPN or RN) Physical Therapy and/or occupational therapy In patient psychiatric care Treatment with IV medication Hospital stay of 3 days or more Treatment for a substance use disorder 	<ul style="list-style-type: none"> At home health care 		
Experience a fall within the last month	No		
Are you or the person you are contacting us about currently living in a nursing home and would like assistance leaving the nursing home?	No		

HEALTH COVERAGE

Health Insurance Information: Do you or the person you are contacting us about have any of the following types of health coverage? Please check all that apply.*	<table border="1"> <tr> <td> <ul style="list-style-type: none"> VA Health Coverage Medicare Private or Employer Insurance HealthSource RI Plan Rhody Health Partners or Rite Care Plan Medicaid All Other Medicaid Application Pending </td> <td> <ul style="list-style-type: none"> Medicaid LTSS </td> </tr> </table>	<ul style="list-style-type: none"> VA Health Coverage Medicare Private or Employer Insurance HealthSource RI Plan Rhody Health Partners or Rite Care Plan Medicaid All Other Medicaid Application Pending 	<ul style="list-style-type: none"> Medicaid LTSS
<ul style="list-style-type: none"> VA Health Coverage Medicare Private or Employer Insurance HealthSource RI Plan Rhody Health Partners or Rite Care Plan Medicaid All Other Medicaid Application Pending 	<ul style="list-style-type: none"> Medicaid LTSS 		

FINANCIAL INFORMATION

Do you or the person you are contacting us about receive any of the following?*	<table border="1"> <tr> <td> <ul style="list-style-type: none"> Supplemental Security Income (SSI) Veterans Administration (VA) Benefits Other None Retirement, Survivors and Disability Insurance Pension or Retirement Plan </td> <td> <ul style="list-style-type: none"> Social Security Disability Insurance (SSDI) </td> </tr> </table>	<ul style="list-style-type: none"> Supplemental Security Income (SSI) Veterans Administration (VA) Benefits Other None Retirement, Survivors and Disability Insurance Pension or Retirement Plan 	<ul style="list-style-type: none"> Social Security Disability Insurance (SSDI)
<ul style="list-style-type: none"> Supplemental Security Income (SSI) Veterans Administration (VA) Benefits Other None Retirement, Survivors and Disability Insurance Pension or Retirement Plan 	<ul style="list-style-type: none"> Social Security Disability Insurance (SSDI) 		
Which of the following best describes the income you/the person have on a monthly basis?*	Between \$2,300 - \$4,500 / month		
Are you or the person you are contacting us about married? If so, and tell us the combined total resources/assets of both spouses when responding to the question	No		

Intake & Screening Tool

What are the total financial assets/resources of the consumer (cash, checking, savings, CD, bonds, etc.) ? (IF SINGLE)* Between \$4,000 - \$10,000 ▼

LIVING ARRANGEMENT

Which of the following best describes where you/the person live(s) now?* Living with Family/Friends ▼

If you/the person reside(s) in a home-like setting (house, apartment, condo, etc.), which of the following best describes who else lives there? Other relatives/friends ▼

ASSISTANCE WITH DAILY ACTIVITIES

In this section, we would like to know more about the areas of daily life where some type of assistance may be needed by you or the person you are contacting us about.

▲ Hide Text

Do you/the person need help on most days with any of the following: (Check all that apply)

Bathing (e.g., getting in and out of a shower/tub, using faucets, hair/body toweling)	<input type="checkbox"/>
Dressing (e.g., putting on/taking off clothes, socks, shoes, or stockings)	<input type="checkbox"/>
Toileting (e.g., getting on or off the toilet, wiping, or changing pads)	<input type="checkbox"/>
Eating (e.g., eat, drink, using utensils, chewing/swallowing)	<input checked="" type="checkbox"/>
Grooming (e.g., brushing teeth, combing hair, shaving, cutting nails)	<input type="checkbox"/>
Managing Medications (e.g., filling prescriptions, taking pills/medicines as directed, keeping meds organized)	<input type="checkbox"/>
Moving About (e.g., going from room to room or outside and back in without a walker or other assistive device)	<input checked="" type="checkbox"/>
Physical transitions (e.g., getting up from or moving between a bed, a chair/wheelchair, or toilet without help)	<input type="checkbox"/>
Housekeeping (e.g., general cleaning, dusting/vacuuming, washing dishes)	<input type="checkbox"/>
Preparing Meals (e.g., planning, cooking, serving and clean-up)	<input checked="" type="checkbox"/>
Shopping (e.g., grocery, clothes, prescriptions)	<input type="checkbox"/>
Laundry (e.g., using washer/dryer, folding, putting laundry away)	<input type="checkbox"/>
Handling Mail (e.g., opening, reading, responding)	<input type="checkbox"/>
Managing Money (e.g., keeping accounts, paying bills, handling cash)	<input type="checkbox"/>
Assistive Devices	<div style="border: 1px solid #ccc; padding: 2px;"> <ul style="list-style-type: none"> Uses a Cane Rollator Uses a walker Wheel-chair reliant Other Falls or is at risk of falling </div> Needs assistance moving

Intake and Screening Tool

6. Scroll to the Intake and Screening Response Results Section to review the scoring.

INTAKE & SCREENING RESPONSE RESULTS

PCOC Recommended	<input type="text" value="Yes"/>
------------------	----------------------------------

High Priority

Living Situation	<input type="text" value="No"/>
Youth (IDD or Other Disability) Who is Turning 19 or 21	<input type="text" value="No"/>

Health Status & Cognition

Behavioral Health	<input type="text" value="No"/>
COVID	<input type="text" value="No"/>
Substance Use	<input type="text" value="No"/>
Physical Disability	<input type="text" value="No"/>
Intellectual or Developmental Disability	<input type="text" value="No"/>
Acquired or Traumatic Brain Injury	<input type="text" value="No"/>
Memory Loss	<input type="text" value="Yes"/>

Medicaid LTSS Financial Eligibility

Already Receiving Medicaid LTSS	<input type="text" value="Yes"/>
Eligible or Almost Certainly Eligible	<input type="text" value="No"/>
Might be eligible	<input type="text" value="Yes"/>
Most likely ineligible	<input type="text" value="No"/>

Referrals

Referral to NHTP	<input type="text" value="Yes"/>
Referral to OSCIL	<input type="text" value="No"/>

By checking this box, I hereby authorize the use or disclosure of my protected health information as described above.	<input checked="" type="checkbox"/>
-----------------------------------------------------------------------------------------------------------------------	-------------------------------------

Intake and Screening Tool > Intake and Screening Response Results

7. Select **Save and Close Documentation** from the File menu.

8. Skip to page 61 to continue with the PCOC Tool.

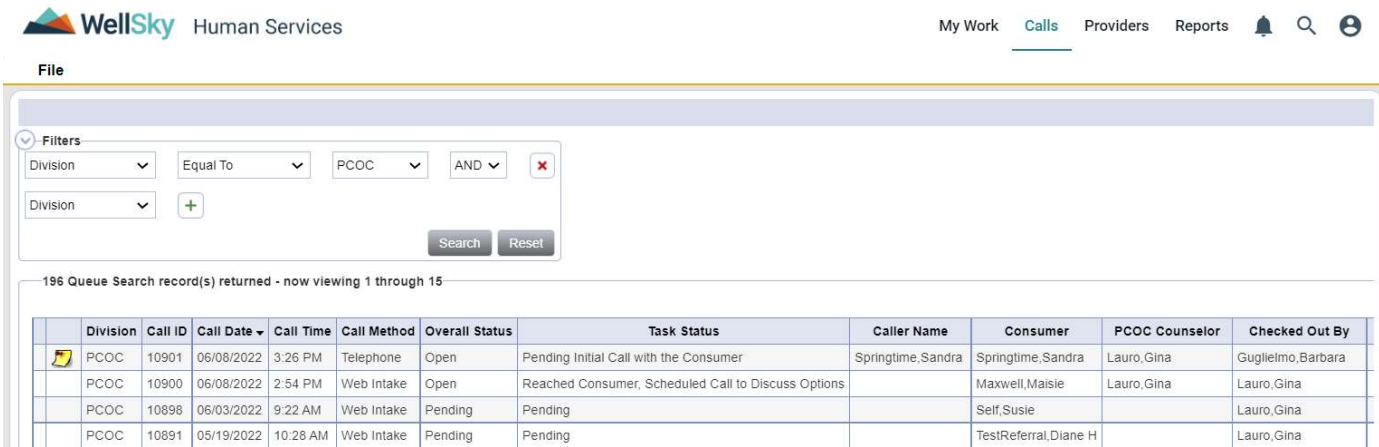
Call Record and PCOC Process

Call records are available in the Calls Chapter. To access the record:

1. Click on the Calls Chapter.



2. Select a record from the Call List Grid.



WellSky Human Services

My Work Calls Providers Reports

File


Filters

Division Equal To PCOC AND

Division +

Search Reset

196 Queue Search record(s) returned - now viewing 1 through 15

	Division	Call ID	Call Date	Call Time	Call Method	Overall Status	Task Status	Caller Name	Consumer	PCOC Counselor	Checked Out By
	PCOC	10901	06/08/2022	3:26 PM	Telephone	Open	Pending Initial Call with the Consumer	Springtime,Sandra	Springtime,Sandra	Lauro,Gina	Guglielmo,Barbara
	PCOC	10900	06/08/2022	2:54 PM	Web Intake	Open	Reached Consumer, Scheduled Call to Discuss Options		Maxwell,Maisie	Lauro,Gina	Lauro,Gina
	PCOC	10898	06/03/2022	9:22 AM	Web Intake	Pending	Pending		Self,Susie		Lauro,Gina
	PCOC	10891	05/19/2022	10:28 AM	Web Intake	Pending	Pending		TestReferral,Diane H		Lauro,Gina

Call List Grid page



The last column of the grid, **Checked Out By**, lets you know if another worker has the record checked out. If that is the case, you will be able to open the record to view only.

3. The Call Details page will display.

File **Tools** **Reports** **Word Merge**

Call	Call Information
Participants	Division: PCOC
Documentation	Date of Initial Contact *: 06/02/2021
Notes	Time of Initial Contact *: 11:57 AM
Associated Calls	Intake and Screening Worker *: Guglielmo, Barbara
Events	Call Date *: 06/02/2021
Track Call Status	Call Time: 11:57 AM
	Call Method: Other
	Type of PCOC *: Other Referral to DHS
	How did you hear about us?: Internet
	In a crisis situation requiring immediate health care assistance? <input type="checkbox"/>
	Reason for Call
	Details of Call
	Decision
	Overall Status *: Open *
	Task Status *: Pending Initial Call with the Consumer
	Comments
	PCOC Counselor: Guglielmo, Barbara

Call Details page

4. Select **Check Out Call** from the File menu.

File Tools Word Merge
History
Spell Check
Check Out Call
Search for Consumer
Print
Close Call

File menu

To navigate a call record, there are subpages on the left side of the page.

Call Subpage	Description
Call	This page contains call and decision information.
Participants	This page contains information on the Caller, Consumer and Contacts.
Documentation	This page contains the intake & screening tool and the PCOC tool.
Notes	This page contains notes and attachments.
Associated Calls	This page allows the worker the ability to search and link other call records.
Referrals	This page allows the worker the ability to search and link resources to the call record.
Events	Triggered Workflow Wizards appear, allowing the worker to see all events that have been triggered in the record.
Track Call Status	This page displays the status changes of the Call.

Call Participants

1. Click on Participants subpage.
2. The Participant List page will display.

File Add Participant

Call

Participants

Documentation

Notes

Associated Calls

Referrals

Events

Track Call Status

Filters

Last Name

2 Participants record(s) returned - now viewing 1 through 2

Last Name	First Name	Relationship to Prosecutive Consumer	Contact Type	City	State	Zip Code	Home Phone	Work Phone	Email	Age
Harrison	David		Caller							
Harrison	David		Consumer	Riverside	Rhode Island	02915				

Call Participants List page

3. Select the Consumer from the grid.
4. The Participant details page will display.

File Tools Reports

Consumer	
Primary	<input checked="" type="checkbox"/>
First Name	Rebecca
Middle Initial	
Last Name	Early
Address Type	Unknown
Street	123 Schooner
Street 2	Apt. 33
City	Tiverton <input type="button" value="Clear"/>
State	Rhode Island <input type="button" value="Clear"/>
Zip Code	02878 <input type="button" value="Clear"/>
Home Phone	
Work Phone	
Work Extension	
Mobile Phone	(401)278-9955
Email	
Race	White
Ethnicity	Non-Hispanic/Non-Latino
Gender	Female
DOB	10/24/1952
Age	68.7
Caregiver Legal Status	Others
Legal Status	Unknown
Marital Status	Never Married
Languages Spoken	English
Interpreter/Translator Needed?	<input type="checkbox"/>
Military Veteran	

[Consumer Details page](#)

- If necessary, add/edit information on the participant.
- Select **Save and Close Consumer** from the File menu.
- Follow steps 3-6 to view the Caller or Other Contacts information.

Intake and Screening Tool

- Click on **Documentation** to open the screening tool.
- Select **Add Documentation** from the File menu.
- The Documentation page will display.
- Select **Intake and Screening Tool** from Please Select Type dropdown list.

Intake & Screening Tool

Call Documentation

Document Date *

Doc. By *

Doc Name *

Status *

Participant

Show Consumer

Start Time

End Time

CONSUMER STATUS

Are you or the person you are contacting us about:

A Rhode Island resident who lives in the state more than 1/2 a year? *

A youth with an intellectual/developmental disability or a serious, chronic and disabling condition who is turning age 19 or 21? *

Expected to need health care services and supports for a period that is likely to last more than a month?

Have any of the following health conditions, illnesses or disabilities caused this need for services and supports: *

Receive any of the following care within the last month:

Experience a fall within the last month

Are you or the person you are contacting us about currently living in a nursing home and would like assistance leaving the nursing home?

Intake & Screening Tool page

14. Complete the form.



Note
If the field has a red asterisk (), the field is required and must be populated in order to save the tool.*

15. At the bottom of the tool is a section, **Intake & Screening Response Results**.

INTAKE & SCREENING RESPONSE RESULTS

PCOC Recommended	<input type="text" value="No"/>
High Priority	
Crisis Situation	<input type="text" value="No"/>
Living Situation	<input type="text" value="No"/>
Youth (IDD or Other Disability) Who is Turning 19 or 21	<input type="text" value="No"/>
Health Status & Cognition	
Behavioral Health	<input type="text" value="No"/>
COVID	<input type="text" value="No"/>
Substance Use	<input type="text" value="No"/>
Physical Disability	<input type="text" value="No"/>
Intellectual or Developmental Disability	<input type="text" value="No"/>
Acquired or Traumatic Brain Injury	<input type="text" value="No"/>
Memory Loss	<input type="text" value="No"/>
Medicaid LTSS Financial Eligibility	
Already Receiving Medicaid LTSS	<input type="text" value="No"/>
Eligible or Almost Certainly Eligible	<input type="text" value="No"/>
Might be eligible	<input type="text" value="No"/>
Most likely ineligible	<input type="text" value="No"/>
Referrals	
Referral to NHTP	<input type="text" value="No"/>
Referral to OSCIL	<input type="text" value="No"/>
By checking this box, I hereby authorize the use or disclosure of my protected health information as described above.	<input type="checkbox"/>

Intake & Screening Response Results

16. If certain criteria are met, the value of the question will change from No to Yes. This information will help guide how you work with the Consumer.
17. Scroll to the top and select a value for the Status.
18. Select **Save and Close Documentation** from the File menu.

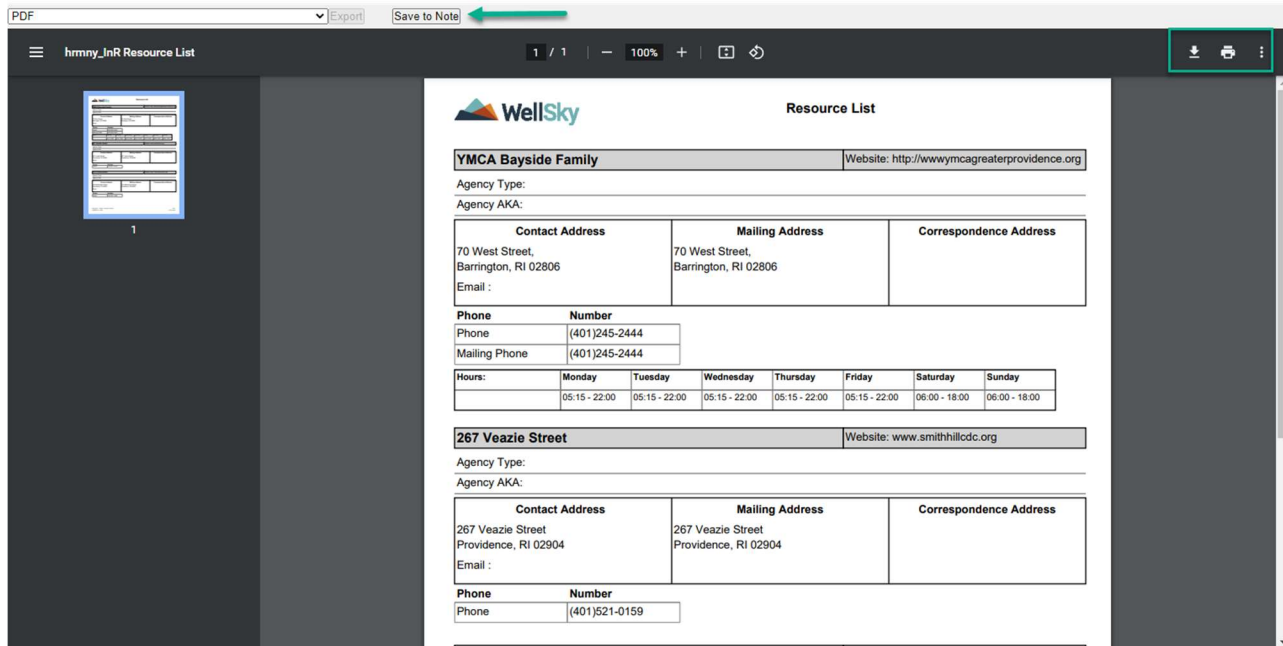
Practice #3 Exercise



Practice Exercise #3

1. Review the participants records.
2. Complete the Intake & Screening Tool.

A report window will display where you can do any of the following:



1. Print by clicking on the printer icon
2. Download the report to your computer by clicking on the down facing arrow
3. Click on **Save to Note**. This will attach the report to a note.

Another option is to click on the down facing arrow in the resources search result grid and a menu will display. Select **Open Citation**.




3 Referrals record(s) returned - now viewing 1 through 3


	Referral Date/Time	Agency	Worker	
	6/21/2022 4:11:22 PM	134 Collaborative	Guglielmo, Barbara	
	6/21/2022 4:11:50 PM	267 Veazie Street	Guglielmo, Barbara	Go To Resource
	6/21/2022 4:12:45 PM	YMCA Bayside Family	Guglielmo, Barbara	Open Citation

A report window will display that provides the same options as the Resource List report.

PDF Export

hmrny_InR Citation Single 1 / 3 100%

 1
 2
 3


Resource Citation

YMCA Bayside Family		Website: http://www.ymcagreaterprovidence.org
Agency Type:		
Agency AKA:		
Contact Address	Mailing Address	Correspondence Address
70 West Street, Barrington, RI 02806	70 West Street, Barrington, RI 02806	
Email :		
Phone	Number	
Phone	(401)245-2444	
Mailing Phone	(401)245-2444	
Hours:	Monday	Tuesday
	05:15 - 22:00	05:15 - 22:00
	Wednesday	Thursday
	05:15 - 22:00	05:15 - 22:00
	Friday	Saturday
	05:15 - 22:00	06:00 - 18:00
	Sunday	
	06:00 - 18:00	
Description		
Agency Conditions		
Special Conditions:		
Language:		
Accessibility:		
Payment Options:		
Age/Gender Restrictions		
Accepts Males: Yes	Accepts Females: Yes	
Minimum Age: 5	Maximum Age: 12	Minimum Age: 5 Maximum Age: 12

PCOC Tool

1. Click on **Documentation** to open the screening tool.
2. Select **Add Documentation** from the File menu.
3. The Documentation page will display.
4. Select **PCOC Tool** from Please Select Type dropdown list.
5. Select the Consumer for the **Participant** field.

PCOC Tool

Call Documentation

Document Date *	07/13/2021 
Doc. By *	Guglielmo, Barbara
Doc Name *	PCOC Tool
Status *	▼ *
Participant	▼
Show Consumer	<input type="checkbox"/>

Documentation>PCOC Tool

6. Select **Copy Shared Response** from File menu.

File Word Merge



Select Copy Share Response from File menu

7. Documents with Shared Response window will display. Select the Intake & Screening Tool in the grid.



WellSky Human Services Call ID = 10198 - David Harrison
3/15/2021 7:42 AM **Documents with Shared Responses**

File

Filters Search Reset

1 Documents with Shared Responses record(s) returned - now viewing 1 through 1
















Document Name	Review	Review Date	Rater	Status
Intake & Screening Tool		01/25/2021	Guglielmo, Barbara	Pending

First Previous Records per page 15 Next Last

Document with Shared Responses List Grid

8. The response results from the Intake & Screening Tool will appear at the top of the form.

INTAKE & SCREENING RESPONSE RESULTS

PCOC Recommended	No	
High Priority		
Crisis Situation	No	
Living Situation	No	
Youth (IDD or Other Disability) Who is Turning 19 or 21	No	
Health Status & Cognition		
Behavioral Health	No	
COVID	No	
Substance Use	No	
Physical Disability	No	
Intellectual or Developmental Disability	No	
Acquired or Traumatic Brain Injury	No	
Memory Loss	No	
Medicaid LTSS Financial Eligibility		
Already Receiving Medicaid LTSS	No	
Eligible or Almost Certainly Eligible	No	
Might be eligible	Yes	
Most likely ineligible	Yes	

Intake & Screening Response Results

9. Complete the form.
10. Scroll to the top and enter a value for the Status field.
11. Select **Save Documentation** from the File menu.
12. The toolbar will now display **Word Merge**. Select **PCOC Action Plan** from the Word Merge menu.



Click Word Merge from toolbar.

13. The Word Merge Editor window will display with the PCOC Action Plan.

Preview (read-only)
This is a preview of your merge document and is not editable.

Generate Merge Document
Click the "Open Document" button to open the Merge Document for editing.

Save to Note
If no changes have been made to the Merge Document, click "Save to Note". The current word merge template will be uploaded to a note record with the merge fields populated.

Upload and Save to Note
If changes were made to the Merge Document, click "Upload and Save to Note" to select the saved file and upload that document to a note record. Don't forget to delete the saved document after you have attached it to the note record.

Your PCOC Action Plan:

Consumer background/preferences: Recently moved into a long term care facility

Goal: Default Goal Number 1 - Goal is to...

Action Steps:
Default Action Step 1a.
Default Action Step 1b.
Default Action Step 1c.
Default Action Step 1d.

Service Options:
Default Service Option 1a.Default Service Option 1b.Default Service Option 1c.

Do you want to save **PCOC Action Plan.docx** (144 KB) from **fwtest.harmonyis.net?**

Save Cancel

PCOC Action Plan Word Merge Letter

If printing to share with consumer:



14. Click on the print icon and follow prompts to print.

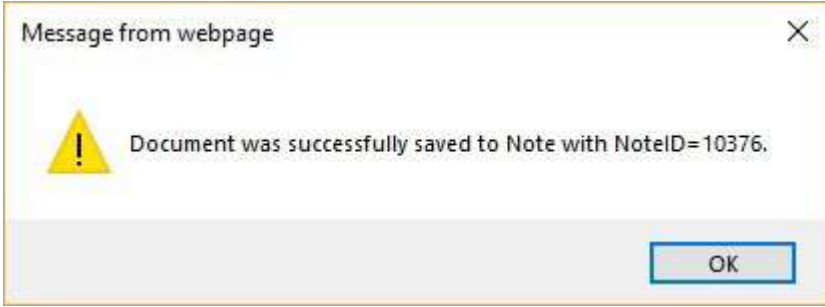
If saving to a note:

Generate Merge Document
Click the "Open Document" button to open the Merge Document for editing.

Save to Note
If no changes have been made to the Merge Document, click "Save to Note". The current word merge template will be uploaded to a note record with the merge fields populated.

Upload and Save to Note
If changes were made to the Merge Document, click "Upload and Save to Note" to select the saved file and upload that document to a note record. Don't forget to delete the saved document after you have attached it to the note record.

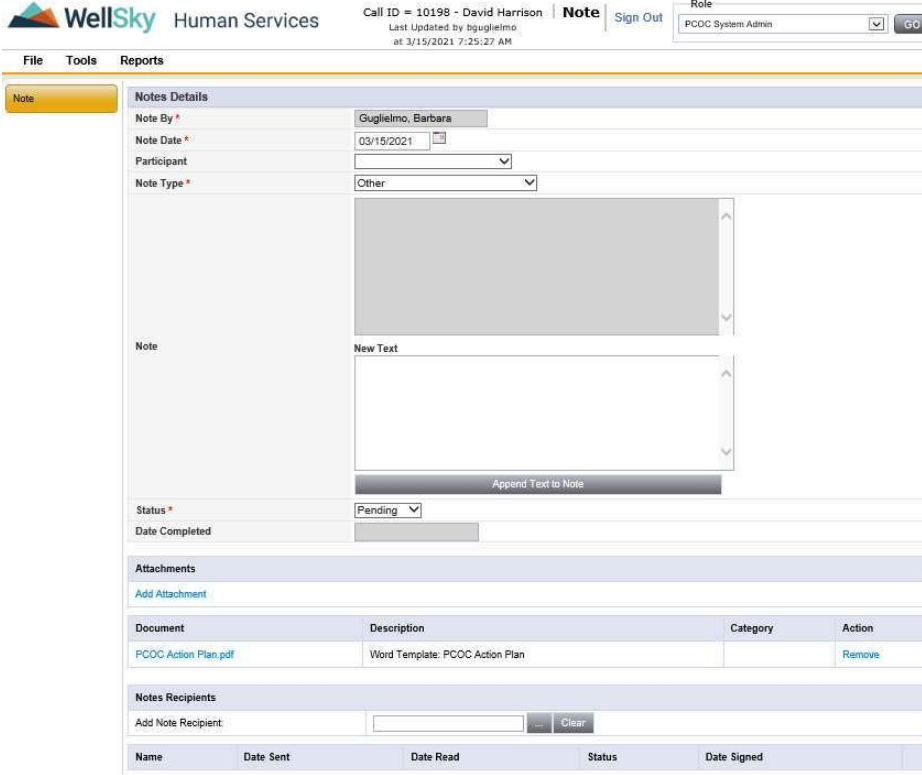
15. Click on **Save to Note**.



Message was successfully saved to Note.

16. Click **OK**.

17. The Notes Details page will display.



WellSky Human Services Call ID = 10198 - David Harrison | Note Sign Out Role: PCOC System Admin

File Tools Reports

Note

Notes Details

Note By * Guglielmo, Barbara

Note Date * 03/15/2021

Participant

Note Type * Other

Note

New Text

Append Text to Note

Status * Pending

Date Completed

Attachments

Add Attachment

Document	Description	Category	Action
PCOC Action Plan.pdf	Word Template: PCOC Action Plan		Remove

Notes Recipients

Add Note Recipient: Clear

Name	Date Sent	Date Read	Status	Date Signed
------	-----------	-----------	--------	-------------

Note Details Page

18. The Note By and Note Date fields will be pre-populated with User's name and Note creation Date.
19. Select the Consumer for the Participant field.
20. Change the Note Type from Other to **PCOC Action Plan**.
21. Enter Note details in the Note textbox. Click **Append Text to Note**. The note will transfer to the greyed-out text box.
22. Under the Document sub-header, you will see the attached document.
23. Change Status from Pending to **Complete**.
24. Select **Save and Close Note** from the File menu.
25. You will be returned to the PCOC Tool form.
26. Select **Save and Close Documentation** from the File menu.

Practice Exercise #4



Practice Exercise #4

1. Search for Referrals.
2. Complete the PCOC Tool.

PCOC Referral Form

1. Click on the Calls Subpage.

File	Tools	Word Merge
Call		1. Unable to Reach Start Session (Send Brochure)
Participants		2. Letter Sent After PCOC (send PCOC Action Plan)
Documentation		3. Unable to Reach for Follow-up (send PCOC Action Plan)
Notes		4. Close Out (send PCOC Action Plan)
Associated Calls	Call Time	02:08 PM
Referrals	Call Method	Telephone
Events	Call Type *	Information
	How did you hear about us?	Community Outreach Worker

Select PCOC Referral Form from the Word Merge menu.

2. Select PCOC Referral Form from the Word Merge menu.

Preview (read-only)
This is a preview of your merge document and is not editable.

Generate Merge Document
Click the "Open Document" button to open the Merge Document for editing.
[Open Document](#)

Save to Note
If no changes have been made to the Merge Document, click "Save to Note". The current word merge template will be uploaded to a note record with the merge fields populated.
[Save to Note](#)

Upload and Save to Note
If changes were made to the Merge Document, click "Upload and Save to Note" to select the saved file and upload it to the note record.
[Upload and Save to Note](#)

Do you want to save **PCOC Referral Form.docx** (172 KB) from **fwtest.harmonyis.net**?
[Save](#) [Cancel](#)

DHS Referral Form
This form is used to refer clients to Independent Provider (IP), Personal Choice, Shared Living, Office of Healthy Aging, Medicaid Preventive (RIPIN) and other interagency and community programs.

Section I: Referral Information
Today's Date: [Click here to enter text.](#)
Name of Referrer (LTSS SCW): [Click here to enter text.](#) Phone #: [Click here to enter text.](#)

Referral to:
 Office of Healthy Aging
 Independent Provider
 Shared Living
 Personal Choice
 Medicaid Preventive (RIPIN)
 Other: [Click to Specify](#)

Section II: Client Information
Please check all that apply
 Client was found Eligible for Preliminary review and is pending Full eligibility Screening

PCOC Referral Form

If printing to share with consumer:



3. Click on the print icon and follow prompts to print.

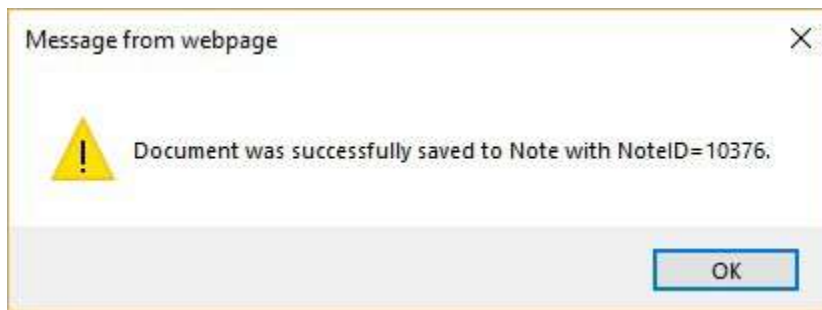
If saving to a note:

Generate Merge Document
Click the "Open Document" button to open the Merge Document for editing.

Save to Note
If no changes have been made to the Merge Document, click "Save to Note". The current word merge template will be uploaded to a note record with the merge fields populated.

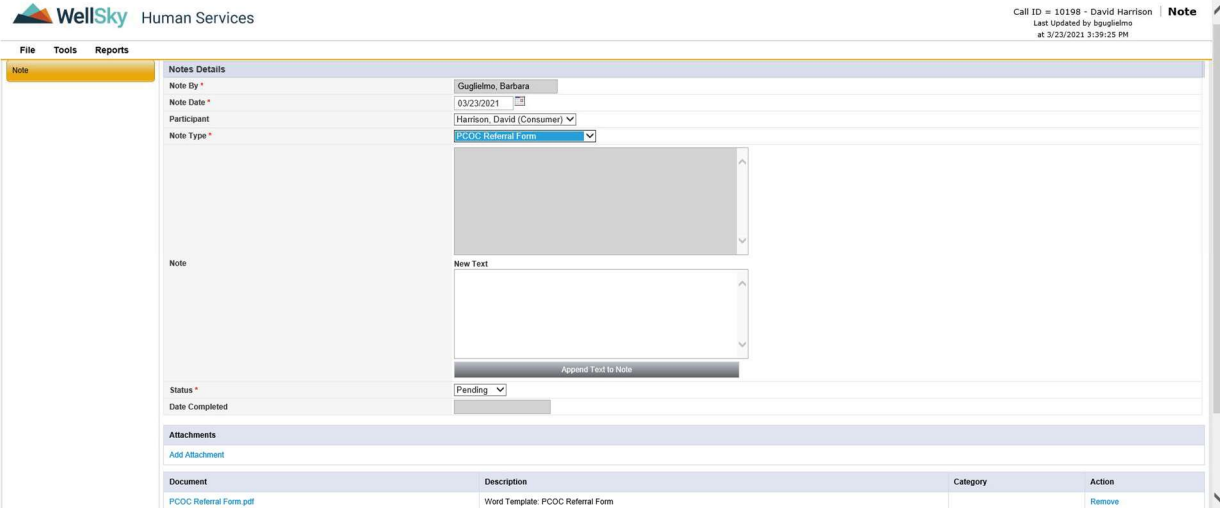
Upload and Save to Note
If changes were made to the Merge Document, click "Upload and Save to Note" to select the saved file and upload that document to a note record. Don't forget to delete the saved document after you have attached it to the note record.

4. Click on **Save to Note**.



Message was successfully saved to Note.

- 5. Click **OK**.
- 6. The Notes Details page will display.



Note Details Page

- 7. The Note By and Note Date fields will be pre-populated with User's name and Note creation Date.
- 8. Select the Consumer for the Participant field.
- 9. Change the Note Type from Other to **PCOC Referral Form**.
- 10. Enter Note details in the Note textbox. Click **Append Text to Note**. The note will transfer to the greyed-out text box.
- 11. Under the Document sub-header, you will see the attached document.
- 12. Change Status from Pending to **Complete**.

13. Select **Save and Close Note** from the File menu.
14. You will be returned to the PCOC Tool form.
15. Select **Save and Close Documentation** from the File menu.

Word Merge Documents

During the PCOC process, counselors may correspond with consumers using letters.

1. Return to the Call details page.
2. Select a letter from the Word Merge menu.



File	Tools	Reports	Word Merge
Call			1. Unable to Reach Start Session (Send Brochure) 1. Unable to Reach Start Session (Send Brochure) - Portuguese
Participants			1. Unable to Reach Start Session (Send Brochure) - Spanish
Documentation			2. Letter Sent After PCOC (send PCOC Action Plan)
Notes			2. Letter Sent After PCOC (send PCOC Action Plan) - Portuguese
Associated Calls			2. Letter Sent After PCOC (send PCOC Action Plan) - Spanish
Events			3. Unable to Reach for Follow-up (send PCOC Action Plan) 3. Unable to Reach for Follow-up (send PCOC Action Plan) - Portuguese
Track Call Status			3. Unable to Reach for Follow-up (send PCOC Action Plan) - Spanish 4. <u>Close Out (send PCOC Action Plan)</u>

Word Merge file options

3. The Word Merge Editor window will open with the chosen letter displayed.


File

Generate Merge Document
Click the "Open Document" button to open the Merge Document for editing.
[Open Document](#)

Save to Note
If no changes have been made to the Merge Document, click "Save to Note". The current word merge template will be uploaded to a note record with the merge fields populated.
[Save to Note](#)

Upload and Save to Note
If changes were made to the Merge Document, click "Upload and Save to Note" to select the saved file and upload that document to a note record. Don't forget to delete the saved document after you have attached it to the note record.
[Upload and Save to Note](#)

Preview (read-only)
This is a preview of your merge document and is not editable.



William Brower
2 Prospect Street
East Greenwich, Rhode Island 02818
Date: April 6, 2021

Re: Introduction to Person-Centered Options Counseling






Dear William Brower,

I am a person-centered options counselor with Rhode Island Office of Healthy Aging. Rhode Island's person-centered options counseling (PCOC) program is a free, short-term services to help people better understand their choices for long-term care given their own unique needs. For your information, I have included a copy of the **PCOC brochure** which tells you how PCOC works in more detail.

If you would like to participate in a PCOC session, I would be more than happy to talk with you over the phone about your long-term needs, goals, and options at (401)555-5555. I am available M-F from 8:30 am to 3:30 pm.

Sincerely,

Barbara Guglielmo
Implementation Consultant
Rhode Island Office of Healthy Aging
(401)555-5555

Do you want to save 1. Unable to Reach to Start Session (Send Brochure).docx (145 KB) from fwtest.harmonyis.net?
[Save](#) [Cancel](#) x

Word Merge Editor window

If printing to share with consumer:



Word Merge Toolbar

1. Click on the print icon and follow prompts to print.

If saving to a note:

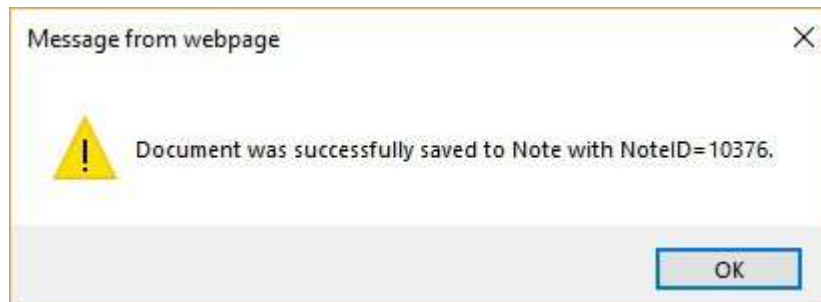
Generate Merge Document
Click the "Open Document" button to open the Merge Document for editing.
[Open Document](#)

Save to Note
If no changes have been made to the Merge Document, click "Save to Note". The current word merge template will be uploaded to a note record with the merge fields populated.
[Save to Note](#) ←

Upload and Save to Note
If changes were made to the Merge Document, click "Upload and Save to Note" to select the saved file and upload that document to a note record. Don't forget to delete the saved document after you have attached it to the note record.
[Upload and Save to Note](#)


Word Merge options

2. Click on **Save to Note**.



Message was successfully saved to Note.

3. Click **OK**.
4. The Notes Details page will display.


Human Services

Call ID = 10198 - David Harrison | **Note** | Sign Out
Last Updated by bguglielmo at 3/15/2021 7:25:27 AM

Role
 PCOC System Admin

Note

Notes Details

Note By *

Note Date *

Participant

Note Type *

Status *

Date Completed

Attachments

[Add Attachment](#)

Document	Description	Category	Action
PCOC Action Plan.pdf	Word Template: PCOC Action Plan		Remove

Notes Recipients

Add Note Recipient:

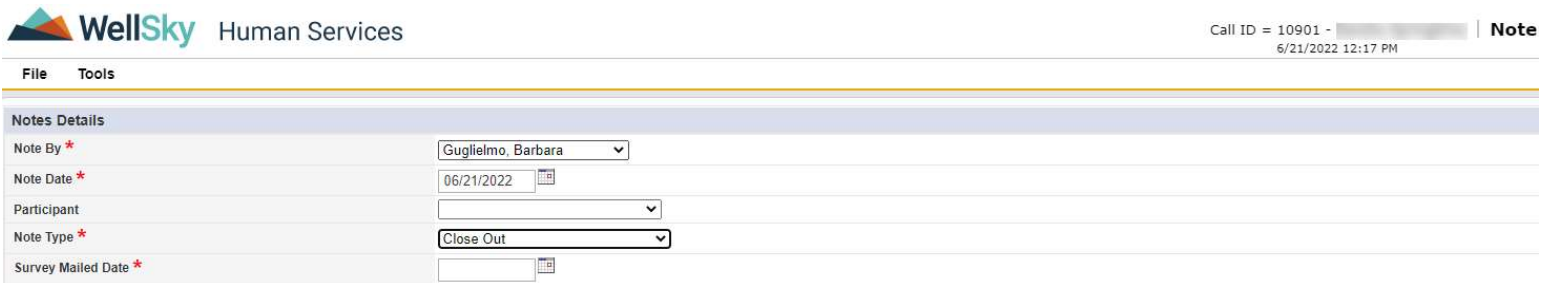
Name	Date Sent	Date Read	Status	Date Signed

Note Details Page

5. The Note By and Note Date fields will be pre-populated with User's name and Note creation Date.
6. Select the Consumer for the Participant field.
7. Change the Note Type from Other to the type of letter attached.
8. Enter Note details in the Note textbox. Click **Append Text to Note**. The note will transfer to the greyed-out text box.
9. Under the Document sub-header, you will see the attached document.
10. Change Status from Pending to **Complete**.
11. Select **Save and Close Note** from the File menu.

Follow Up Note

1. Click on Notes subpage.
2. Select **Add Note** from File menu.
3. The Notes Details page will display.
4. The Notes By and Note Date fields will be pre-populated with User's name and Note creation Date.
5. Select the Consumer for the Participant field.



WellSky Human Services Call ID = 10901 - [REDACTED] | Note
6/21/2022 12:17 PM

File Tools

Notes Details

Note By *

Note Date *

Participant

Note Type *

Survey Mailed Date *

6. Select **Close Out** for Note Type.
7. **Survey Mailed Date** field will display.
8. Enter Note details in the Note textbox.
9. Change Status from Pending to Complete.
10. Select **Save and Close Note** from the File menu.

Practice Exercise #5



Practice Exercise #5

1. Execute a Word Merge Letter.
2. Add a Referral.

Decision & Check in Call

This section is used to document where in the process a counselor and consumer are in the workflow.

If Overall Status Open:

While the Overall Status of the Call record is Open, PCOC Counselors will track their progress using the Task Status

dropdown.

Pending Initial Call with the Consumer
Reached Consumer, Scheduled Call to Discuss Options
Unable to Reach Consumer, Pending First Follow-up Call
Unable to Reach Consumer, Pending Second Follow-up Call
Pending Initial PCOC Session
Pending PCOC Close-Out
Pending PCOC Follow-Up

If uninterested or unavailable:

1. Click on the Calls details page.
2. Under the Decision section, change the Overall Status to equal **Complete**.
3. Change Task Status to equal **Closed**.
4. Select the activities completed for **What activities did you complete?**, if applicable.
5. Enter notes in the Comments field, if applicable.
6. Select a value(s) for Resolution.
7. Select **Save, Check in and Close Call** from File menu.

If Information & Referral:

1. Click on the Calls details page.
2. Under the Decision section, change the Overall Status to equal **Complete**.
3. Change Task Status to equal **Closed**.
4. For **What activities did you complete?**, select Information and Referral.
5. Enter notes in the Comments field, if applicable.
6. Select a value(s) for Resolution.
7. Select **Save, Check in and Close Call** from File menu.

If Application Assistance:

1. Click on the Calls details page.
2. Under the Decision section, change the Overall Status to equal **Complete**.
3. Change Task Status to equal **Closed**.
4. For **What activities did you complete?**, select Application Assistance.
5. Enter notes in the Comments field, if applicable.

6. Select a value(s) for Resolution.
7. Select **Save, Check in and Close Call** from File menu.

If Opt Out:

8. Click on the Calls details page.
9. Under the Decision section, change the Overall Status to equal Complete.
10. Change Task Status to equal **Closed**.
11. Select the activities completed for **What activities did you complete?**, if applicable.
12. Enter notes in the Comments field, if applicable.
13. **Select Opt Out** for Resolution.
14. Select **Save, Check in and Close Call** from File menu.

If PCOC was Completed:

1. Click on Calls details page.
2. Under the Decision section, change the Task Status to equal **Closed**
3. Select the activities completed for **What activities did you complete?**
4. Enter notes in the Comments field, if applicable.
5. Select a HCBS or Institutional referral option(s) or Other for Resolution
6. Select **Save, Check in and Close Call** from File menu.

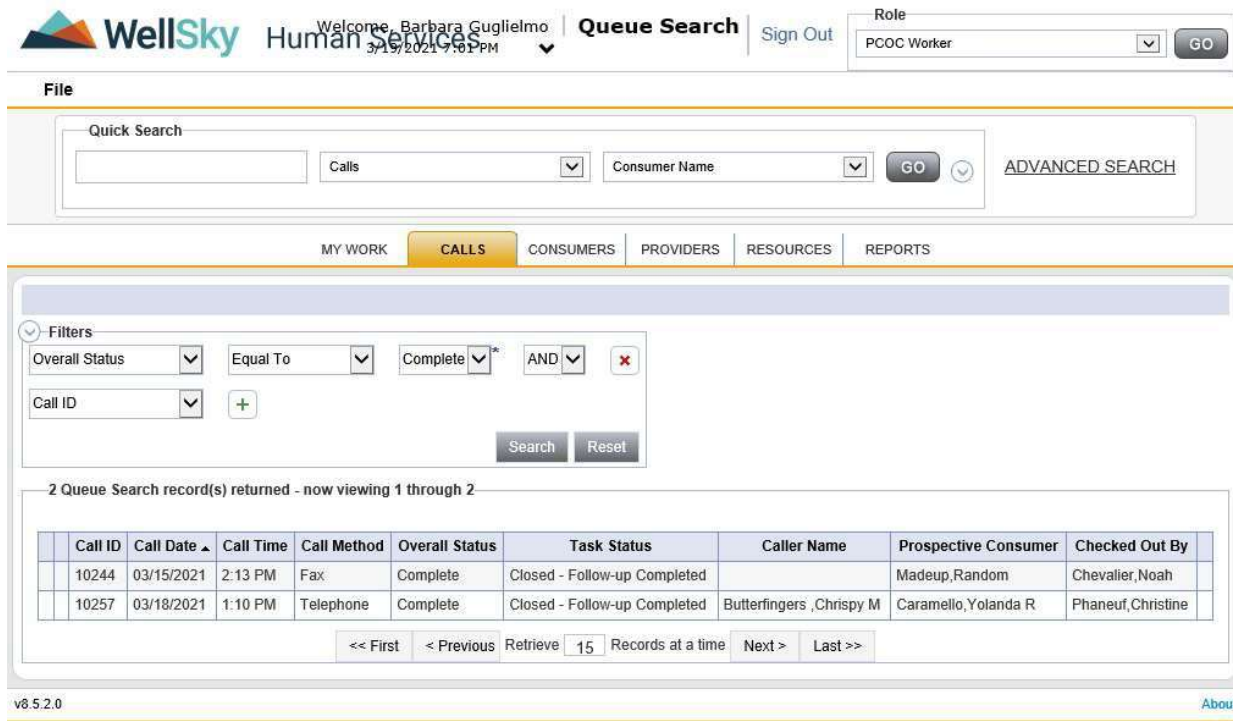
Unlocking a Call Record

There may be circumstances where a counselor will need to unlock a call record (Prospective Consumer opt out/changed mind, Counselor able to contact Prospective Consumer, etc.)

1. Click on the Calls Chapter.



2. Select a record from the Call List Grid.



The screenshot displays the 'Queue Search' interface. At the top, there is a user welcome message for Barbara Guglielmo, a 'Queue Search' button, a 'Sign Out' button, and a 'Role' dropdown menu set to 'PCOC Worker' with a 'GO' button. Below this is a 'File' section with a 'Quick Search' area containing a text input field, a 'Calls' dropdown, a 'Consumer Name' dropdown, a 'GO' button, and an 'ADVANCED SEARCH' link. The main content area has a navigation bar with 'CALLS' highlighted. Below the navigation bar is a 'Filters' section with dropdowns for 'Overall Status', 'Equal To', 'Complete', and 'AND', along with a 'Call ID' dropdown and a '+' button. There are 'Search' and 'Reset' buttons. Below the filters, it says '2 Queue Search record(s) returned - now viewing 1 through 2'. A table displays the search results:

Call ID	Call Date	Call Time	Call Method	Overall Status	Task Status	Caller Name	Prospective Consumer	Checked Out By
10244	03/15/2021	2:13 PM	Fax	Complete	Closed - Follow-up Completed		Madeup,Random	Chevalier,Noah
10257	03/18/2021	1:10 PM	Telephone	Complete	Closed - Follow-up Completed	Butterfingers ,Chrispy M	Caramello,Yolanda R	Phaneuf,Christine

At the bottom of the table, there are navigation buttons: '<< First', '< Previous', 'Retrieve 15 Records at a time', 'Next >', and 'Last >>'. The footer shows 'v8.5.2.0' and an 'About' link.

Call List Page

3. The Call Details page will display.

Call Information	
Division	PCOC
Date of Initial Contact *	06/28/2021
Time of Initial Contact *	10:04 AM
Intake and Screening Worker *	Guglielmo, Barbara
Call Date *	06/28/2021
Call Time	10:04 AM
Call Method	Telephone
Type of PCOC *	Incoming Call to The Point
How did you hear about us?	Hospital Referral
In a crisis situation requiring immediate health care assistance?	<input checked="" type="checkbox"/>
Reason for Call	
Details of Call	<div style="border: 1px solid gray; height: 40px;"></div>
Decision	
Overall Status *	Complete *
Task Status *	Closed - Intake and Screening
What activities did you complete?	<div style="border: 1px solid gray; padding: 2px;"> Application Assistance Information and Referral Initial PCOC Intake and Screening Other </div>
Comments	<div style="border: 1px solid gray; height: 40px;"></div>
Resolution	<div style="border: 1px solid gray; padding: 2px;"> Client Withdrew Medicaid Application Consumer Applied in Error Consumer Declined PCOC HCBS Referral - DHS Community HCBS Referral - NHTP HCBS Referral - OHA Community HCBS Referral - OSCIL </div>
PCOC Counselor	Guglielmo, Barbara
Resolution Date	06/28/2021

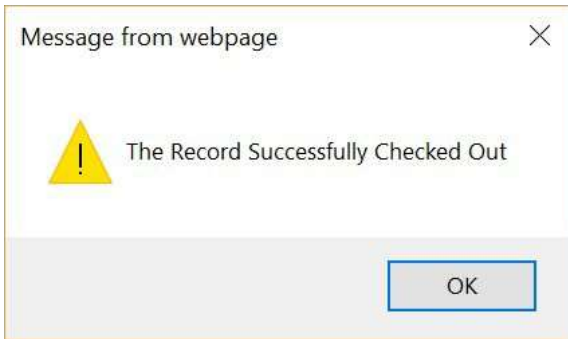
Call Details Page

4. Select **Check Out Call** from the File menu.

File	Tools	Word Merge
History		
Spell Check		
Check Out Call		
Search for Consumer		
Print		
Close Call		

Select Check Out Call from File menu

5. A message will display. Click **OK**.



Message from webpage

6. Select **Reverse Disposition** from the File menu.

File	Tools	Reports	Word Merge																												
<ul style="list-style-type: none"> Call Participants Documentation Notes Associated Calls Events Track Call Status 	<h3>Call Information</h3> <table border="1"> <tr> <td>Division</td> <td>PCOC</td> </tr> <tr> <td>Date of Initial Contact *</td> <td>08/28/2021</td> </tr> <tr> <td>Time of Initial Contact *</td> <td>10:04 AM</td> </tr> <tr> <td>Intake and Screening Worker *</td> <td>Guglielmo, Barbara</td> </tr> <tr> <td>Call Date *</td> <td>08/28/2021</td> </tr> <tr> <td>Call Time</td> <td>10:04 AM</td> </tr> <tr> <td>Call Method</td> <td>Telephone</td> </tr> <tr> <td>Type of PCOC *</td> <td>Incoming Call to The Point</td> </tr> <tr> <td>How did you hear about us?</td> <td>Hospital Referral</td> </tr> <tr> <td>In a crisis situation requiring immediate health care assistance?</td> <td><input checked="" type="checkbox"/></td> </tr> </table> <h3>Reason for Call</h3> <p>Details of Call</p> <h3>Decision</h3> <table border="1"> <tr> <td>Overall Status *</td> <td>Pending</td> </tr> <tr> <td>Task Status *</td> <td>Closed - Intake and Screening</td> </tr> <tr> <td>Comments</td> <td></td> </tr> <tr> <td>PCOC Counselor</td> <td>Guglielmo, Barbara</td> </tr> </table>			Division	PCOC	Date of Initial Contact *	08/28/2021	Time of Initial Contact *	10:04 AM	Intake and Screening Worker *	Guglielmo, Barbara	Call Date *	08/28/2021	Call Time	10:04 AM	Call Method	Telephone	Type of PCOC *	Incoming Call to The Point	How did you hear about us?	Hospital Referral	In a crisis situation requiring immediate health care assistance?	<input checked="" type="checkbox"/>	Overall Status *	Pending	Task Status *	Closed - Intake and Screening	Comments		PCOC Counselor	Guglielmo, Barbara
Division	PCOC																														
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Call Time	10:04 AM																														
Call Method	Telephone																														
Type of PCOC *	Incoming Call to The Point																														
How did you hear about us?	Hospital Referral																														
In a crisis situation requiring immediate health care assistance?	<input checked="" type="checkbox"/>																														
Overall Status *	Pending																														
Task Status *	Closed - Intake and Screening																														
Comments																															
PCOC Counselor	Guglielmo, Barbara																														

Call Details Page

7. The record is now editable. You are now able to document your work with the Prospective Consumer.

Associating Call Records

1. From the Call Details page, select **Save and Duplicate Call** from the File menu.



WellSky Human Services

Call ID = 10640 - Scott Test **Call**
Last Updated by dkranovich
at 7/7/2021 12:07:55 PM

File Tools Reports Word Merge

- History
- Spell Check
- Save Call
- Save and Close Call
- Save, Check In and Close Call
- Save and Duplicate Call**
- Check In Call
- Print
- Close Call

PCOC ▼

act * 07/07/2021

act * 12:05 PM

ng Worker * Kranovich, Dan ▼

07/07/2021

12:05 PM

▼

Other Referral to DHS ▼

How did you hear about us? ▼

In a crisis situation requiring immediate health care assistance?

Reason for Call

Details of Call

Decision

Overall Status * Open ▼*

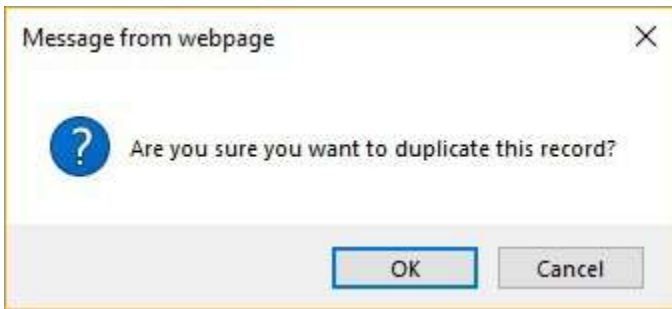
Task Status * Pending Initial Call with the Consumer ▼

Comments

PCOC Counselor Kranovich, Dan ▼

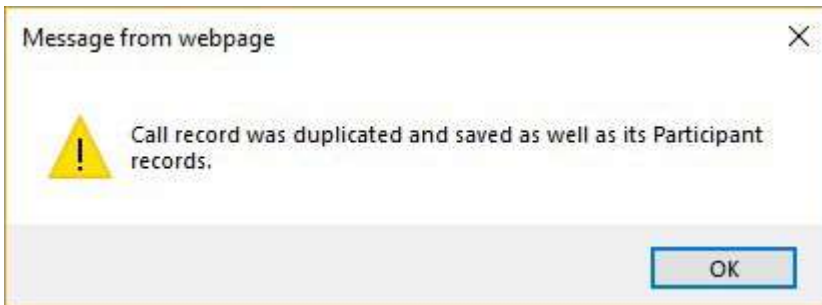
Call Details Page

2. A message will display. Click **OK**.



Message Dialog Box

3. Another message will display. Click **OK**.



Message Dialog Box

4. The new Call record displays.

File Tools Reports Word Merge

Call	Call Information	
Participants	Division	PCOC ▼
Documentation	Date of Initial Contact *	07/08/2021
Notes	Time of Initial Contact *	01:12 PM
Associated Calls	Intake and Screening Worker *	Guglielmo, Barbara ▼
Events	Call Date *	07/07/2021
Track Call Status	Call Time	12:05 PM
	Call Method	▼
	Type of PCOC *	Other Referral to DHS ▼
	How did you hear about us?	▼
	In a crisis situation requiring immediate health care assistance?	<input type="checkbox"/>
	Reason for Call	
	Details of Call	
	Decision	
	Overall Status *	Pending ▼*
	Task Status *	Pending ▼
	Comments	
	PCOC Counselor	▼

[Call Details page](#)

5. Click on the Participants Subpage.
6. The Prospective Consumer from the original call record is set to a Contact as seen below on the Participant List page.

File Add Participant

Call

Participants

Documentation

Notes

Associated Calls

Referrals

Events

Track Call Status

Filters

Last Name +

Search Reset

2 Participants record(s) returned - now viewing 1 through 2

Last Name	First Name	Relationship to Prosecutive Consumer	Contact Type	City	State	Zip Code	Home Phone	Work Phone	Email
Sargent	Thelma		Contact	Providence	Rhode Island	02901			
Sargent	Denise		Caller	Providence	Rhode Island	02901			

First Previous
Records per page 15
Next Last

Call Participant List page

- Select **Consumer Participant** from the Add Participant menu.

Add Participant

Consumer Participant

Contacts Participant

Add Participant File menu

- The Consumer Details page will display.

File	Tools
<div style="background-color: #FFD700; padding: 2px;"> Upload Photo </div> <div style="background-color: #FFD700; padding: 2px;"> Search For Person </div>	
Consum	
Primary	
First Name	<input type="text"/>
Middle Initial	<input type="text"/>
Last Name	<input type="text"/>
Address Type	<input type="text"/>
Street	<input type="text"/>
Street 2	<input type="text"/>
City	<input type="text"/> <input type="button" value="Clear"/>
State	<input type="text"/> <input type="button" value="Clear"/>
Zip Code	<input type="text"/> <input type="button" value="Clear"/>
Home Phone	<input type="text"/>
Work Phone	<input type="text"/>
Work Extension	<input type="text"/>
Mobile Phone	<input type="text"/>
Email	<input type="text"/>
Race	<input type="text"/>
Ethnicity	<input type="text"/>
Gender	<input type="text"/>
DOB	<input type="text"/>
Age	<input type="text"/>
Caregiver Legal Status	<input type="text"/>
Legal Status	<input type="text"/>
Marital Status	<input type="text"/>
Languages Spoken	<input type="text"/>
Interpreter/Translator Needed?	<input type="checkbox"/>
Military Veteran	<input type="text"/>
Relationship to Consumer	Self
Case No	<input type="text"/>

Prospective Consumer Details page

9. Select **Search for Person** from the Tools menu.
10. The People Search window will display.
11. Search for the person (Refer to page 21).
12. Complete the information on the Prospective Consumer details page.

File Tools Reports

History
Spell Check
Save Consumer
Save and Close Consumer
Print
Close Consumer

<input checked="" type="checkbox"/>		
	Rebecca	
	Early	
	Unknown	
Street	123 Schooner	
Street 2	Apt. 33	
City	Tiverton	Clear
State	Rhode Island	Clear
Zip Code	02878	Clear
Home Phone		
Work Phone		
Work Extension		
Mobile Phone	(401)278-9955	
Email		
Race	White	
Ethnicity	Non-Hispanic/Non-Latino	
Gender	Female	
DOB	10/24/1952	
Age	68.7	
Caregiver Legal Status	Others	
Legal Status	Unknown	
Marital Status	Never Married	
Languages Spoken	English	
Interpreter/Translator Needed?	<input type="checkbox"/>	
Military Veteran		

Prospective Consumer Details page

13. Select **Save and Close Consumer** from the File menu.
14. Click on the **Associated Calls** subpage.
15. The list page will show the original Call record.

File Tools

Call

Participants

Documentation

Notes

Associated Calls

Referrals

Events

Track Call Status

 Filters

1 Associated Calls record(s) returned - now viewing 1 through 1

Call ID	Call Date	Call Time	Type of PCOC	Overall Status	Duplicate
10345	04/06/2021	4:27 PM	Incoming Call to The Point	Open	Yes

 Records per page

Associated Calls List page

Practice Exercise #6



Practice Exercise #6

1. Update the Decision section of a Call record.

Practice Quiz



Quiz #1

1. True or False: My Work Chapter is where you add a Call record.
2. What role is used to Add a record?
3. True or False: Marital Status of Consumer is recorded on the PCOC Tool.
4. What page would you navigate to execute a Word Merge letter?
5. Where would you find the Intake & Screening Tool?
6. What is a People Search?
7. What is My Work?

Training Notes