

- Workflows- Customizing Your Home Page

1. Log In

Section 1 - How to Move the Boxes on Your Home Page

1. On the home page you will see 1-4 different sections or “boxes” that contains different information like client lists, system news, and your follow-up list.

Home > Home Page Dashboard

i You have modified your Home Page Dashboard. Click Save to save your changes or Undo Changes to undo all modifications.

System News (2)		Agency News (2)	Follow Up List (0)	
Date	Headline		Client ID	Type
10/01/2023	2024 HMIS Data Standards			
05/27/2021	TCHC Updated SC HMIS Policy & Procedure Manual Available Online			

Add System News View All

Counts Report [Move] [Close]

Clients With An Entry But No Exit:

2. In order to re-arrange their order on your home page, you can move them by selecting the 6 dots in the top right corner of each box.

Home Page Dashboard - Community Services

ServicePoint Training Site
UHC-Upstate CoC
October 30, 2023

UHC- Anna Johnson
System Admin II

Shadow Mode
Back Date Mode
Connect To BusinessObjects

Home > Home Page Dashboard

Type here for Global Search

i You have modified your Home Page Dashboard. Click Save to save your changes or Undo Changes to undo all modifications.

Save Undo Changes

Follow Up List (0)

Client ID	Type	Date	Time Remaining
-----------	------	------	----------------

View All

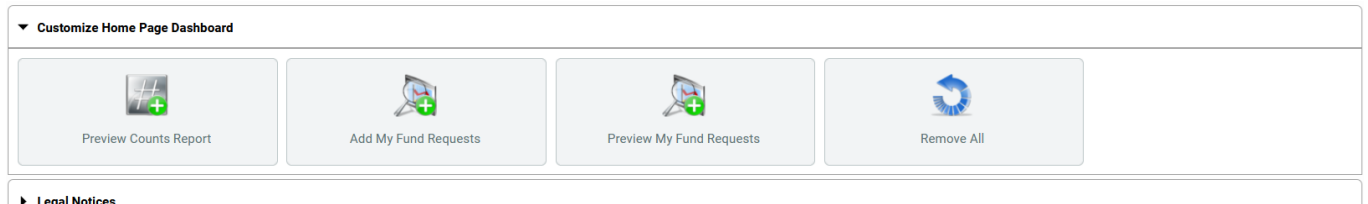
Counts Report [Close]

Clients With An Entry But No Exit: 0

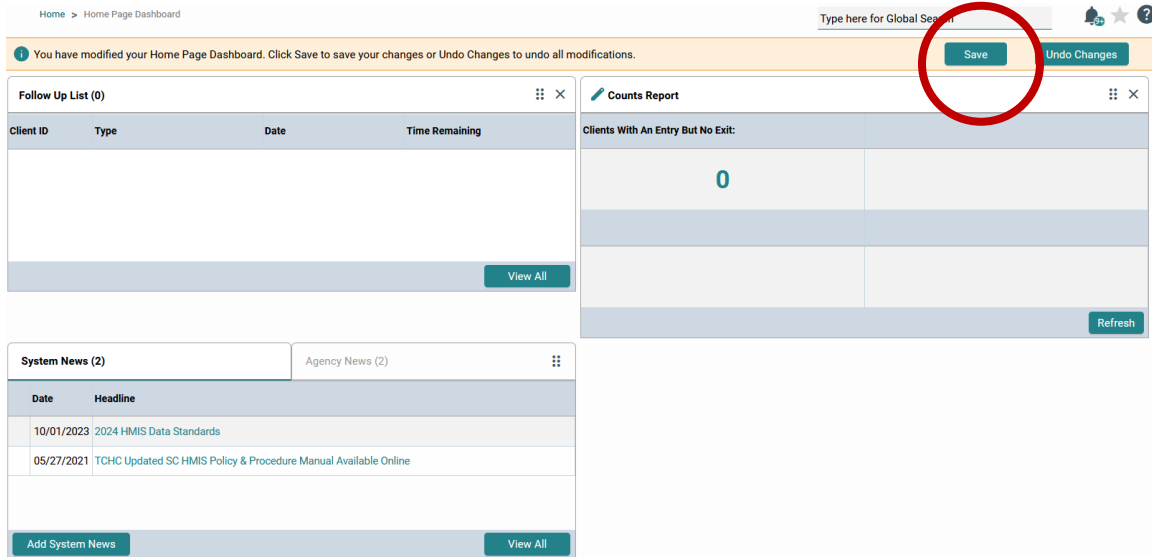
Refresh

Move Here

- You can add/remove sections utilizing the “Customize Home Page Dashboard” on the bottom of your Home Page.



- REMEMBER – You must click “Save” in the top right corner of the screen for this to stay.



Section 2 – How to Set/Use Your Follow-Ups Tool

- The follow-ups tool is a fantastic tool for anyone managing clients directly. The main concept is to set a “follow-up” or reminder to do a task on the client’s profile and that reminder will show up on your profile with how many days remaining and links directly to both the client’s profile and the goal itself. Examples of how some users utilize this tool are **Street Outreach** setting reminders to remove participants who are inactive after a period of time, **Rapid Rehousing Case Managers** needing to enter in their checks as services for rental assistance, or **Permanent Supportive Housing Case Managers** scheduling Annual Assessments for their clients. Other examples may include **Shelter Staff** setting reminders to help a client order a form of ID or even scheduling a follow-up appointment for them. **Anyone can use this feature and you can select from a large list of available options or create a custom reminder yourself.**

Example of a Follow-Up List:

Follow Up List (5)			
Client ID	Type	Date	Time Remaining
313746	Goal	06/09/2023	Past
313746	Goal	07/15/2023	Past
313746	<input type="text" value="Jump To Goal: Case Plan"/>	11/04/2023	5 Days
313746	Goal	12/15/2023	46 Days
124226	Goal	08/27/2024	302 Days

[View All](#)

2. There are three locations where a Follow-Up can be set.

- Assessments
- Services
- Case Plans

3. To access any of these, first go to the client's profile.

The screenshot shows the WellSky interface for a client profile. The top navigation bar includes the WellSky logo, 'Community Services', and user information for 'UHC- Anna Johnson, System Admin II'. The main header identifies the site as 'ServicePoint Training Site' and 'UHC-Upstate CoC' with a date of 'October 30, 2023'. The client profile is for '(36) Test, Anna', with a 'Release of Information: None' status. The page is divided into several sections: 'Client Information' (Summary, Client Profile, Households, ROI), 'Service Transactions' (Entry / Exit, Case Managers, Case Plans, Assessments), 'Release of Information' (table with columns: Provider, Permission, Start Date, End Date), and 'Entry/Exits' (table with columns: Program, Type, Project Start Date, Exit Date). The 'Entry/Exits' table lists three entries for HUD programs starting on 10/27/2023. A sidebar on the left contains navigation options like 'Last Viewed', 'Favorites', 'Home', 'Clients', 'Calls', 'Resources', 'Fund Manager', 'Shelters', 'Reports', 'Admin', and 'Logout'.

- We will look at Assessments first. Go to the client's profile and select an assessment (this can also be done while creating a new assessment like a project Entry or an Interim Update).

Entry/Exit Data

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

Provider * UHC-Upstate CoC Test Agency (16416) Search My Provider Clear

Type * RHY Update

Household Members Associated with this Entry / Exit

Name	Head of Household	Project Start Date	Exit Date	Interims	Follow Ups	Reason for Leaving	Destination	Notes
(381988) Test, Anna G	Yes	10/12/2023						

Include Additional Household Members Showing 1-1 of 1

Entry Assessment

Select an Assessment

UHC-Coordinated Entry System-Case Notes (2020 v.1)(FINAL) UHC - HHS RHY Entry for BCP ES & HP (FY2024)

Household Members

(381988) Test, Anna G
Age: 32
Veteran: No (HUD)

Household Data Sharing

Client: (381988) Test, Anna G Add Household Data

UHC - HHS RHY Entry for BCP ES & HP (FY2024) Entry Date: 10/12/2023 12:00:00 AM

Date of Birth 11 / 13 / 1990 Full DOP Reported (HUD)

- Next, you will notice that there is a small green "G" next to questions on the assessment and select one next to a question you would like to create a follow-up for.

Are you currently receiving income from any source? No (HUD) G

Monthly Income

Monthly Amount	Source of Income	Receiving Income Source?
----------------	------------------	--------------------------

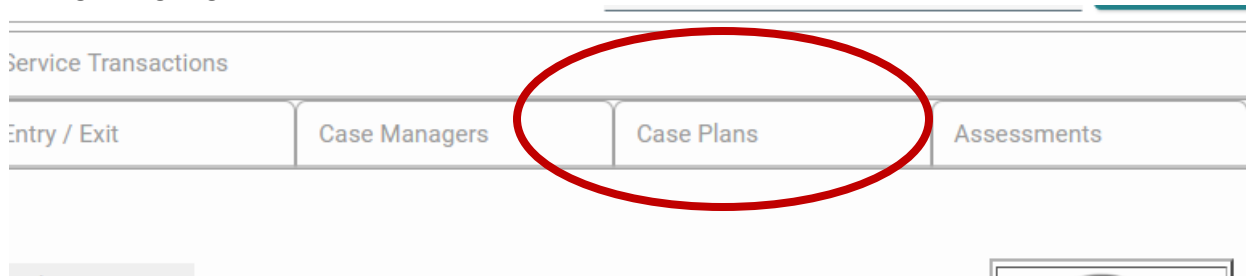
6. You can then add a "Goal."

Add Goal [X]


Goal

Provider *	UHC-Upstate CoC (886)	<input type="button" value="Search"/>	<input type="button" value="My Provider"/>	<input type="button" value="Clear"/>
Date Goal was Set *	10 / 31 / 2023	<input type="button" value="Calendar"/>	<input type="button" value="Refresh"/>	<input type="button" value="Calendar"/>
Classification *	Employment	▼		
Type *	Apply for Jobs	▼		
Goal Description	Help client create resume			
Target Date	11 / 05 / 2023	<input type="button" value="Calendar"/>	<input type="button" value="Refresh"/>	<input type="button" value="Calendar"/>
Overall Status *	Identified	▼		
Case Note	Help client create resume and get on job boards			










7. Once your goal is added on the assessment, you can then add the follow-up reminder to this goal by saving and exiting, and going to the Case Plans tab.












- Once on the Case Plans tab, you will select the goal you've just created by clicking the pencil icon next to it.

Goals		
	Classification	Type
	Employment	Apply for Jobs
Edit Goal Add Goal		

- Once you click the pencil you will see all of the information you added during creation of the goal, as well as a number of other fields where you can add additional information like Case Notes, Action Steps, or even Services. Here we will be able to add our "Follow Up" as well:

Projected Follow Up Date	<input type="text" value=" / /"/>   
Follow Up User	<input type="text" value="UHC-Upstate CoC (886)"/> Search My Provider Clear
	<input type="text" value="-Select-"/> 
Follow Up Made	<input type="text" value="-Select-"/> 
Completed Follow Up Date	<input type="text" value=" / /"/>   
Outcome at Follow Up	<input type="text" value="-Select-"/> 

- To then add the Follow Up, you will add the projected Follow Up Date which is the day that the system will count down to. For example, if it's Monday, and you want to follow up on Thursday, the date you would enter would be Thursday. If you wanted the task complete by Thursday, you may want to set your Follow Up a day or two early to give you time to actually complete the task.
- To add to your profile, you will only need to fill out the first three boxes.

Projected Follow Up Date	<input type="text" value="12 / 12 / 2024"/>   
Follow Up User	<input type="text" value="UHC-Upstate CoC (886)"/> Search My Provider Clear
	<input type="text" value="UHC- Anna Johnson"/> 
Follow Up Made	<input type="text" value="-Select-"/> 
Completed Follow Up Date	<input type="text" value=" / /"/>   
Outcome at Follow Up	<input type="text" value="-Select-"/> 

12. Then save and exit.

13. Return to your Home page to view your goal and how many days you have left.

Follow Up List (6) ☰ ✕			
Client ID	Type	Date	Time Remaining
313746	Goal	06/09/2023	Past
313746	Goal	07/15/2023	Past
313746	Goal	11/04/2023	4 Days
313746	Goal	12/15/2023	45 Days
124226	Goal	08/27/2024	301 Days
381988	Goal	12/12/2024	408 Days

[View All](#)

14. To close out your goal you can select "Goal" and select the outcome.

Projected Follow Up Date: 12 / 12 / 2024 📅 ↺ 📅

Follow Up User: UHC-Upstate CoC (886) 🔍 My Provider Clear
UHC- Anna Johnson ▼

Follow Up Made: Yes ▼

Completed Follow Up Date: 10 / 31 / 2023 📅 ↺ 📅

Outcome at Follow Up: -Select- ▼

- Select-
- Abandoned
- Achieved
- Client Refused Service
- Did not qualify
- Goal Revised
- No Change
- Was Achieved, Now Failed
- Was Failed, Now Achieved

Case Notes

Provider	Case	Note Date	Note
UHC-Upstate CoC	son	10/31/2023	Help client apply for job




[Add Case Note](#)

Showing 1-1 of 1










Action Steps Planned

15. Once filled out, you can close your follow-up section as well as the goal itself.

Follow Up:














Follow Up Made	Yes	▼
Completed Follow Up Date	10 / 31 / 2023	  
Outcome at Follow Up	Achieved	▼

Goal:

Date Goal was Set *	10 / 31 / 2023	  
Classification *	Employment	▼
Type *	Apply for Jobs	▼
Goal Description	Help client apply for job	
Target Date	11 / 05 / 2023	  
Overall Status *	fully met	▼
If Closed, Outcome	Achieved	▼
If Partially Complete, Percent Complete	-Select-	▼
		10 / 31 / 2023   

16. Save and exit.

17. Follow Ups can also be set for Services and Case Plans using the same instructions as above. For Case Plans, follow the above instructions from the Case Plan section down. For Services, you should go to the Services Tab and click the pencil icon next to the service you would like to add the follow-up to (again, this can be done while you're creating your Service, Case Note, or Assessment).

Client Information		Service Transactions			
Needs	Services	Referrals	Shelter Stays	Entire Service History	
All Service Transactions					
Select Dates	Start Date	End Date		Search	
-Select-	/ /	/ /			
Transaction Type	Date	Provider	Type	Need Status / Outcome	Need Goal
   Need	10/10/2023	UHC-Upstate CoC	Benefits Assistance	Identified	
   Need	10/10/2023	UHC-Upstate CoC	Automotive Repair and Maintenance	Closed / Fully Met	
  Service	10/10/2023	UHC-Upstate CoC	Automotive Repair and Maintenance		
   Need	07/11/2023	UHC-Upstate CoC	Bus Fare	Identified	
  Service	07/11/2023	UHC-Upstate CoC	Bus Fare		

Once you've clicked the pencil icon to edit the Service, you can then scroll down to the Follow Up section and add your Follow Up to your profile. Save & Exit.

Add Conditional Commitment
Print Commitment Letter
No matches.

Support Documentation

Date Added	Name	Description	Type
Add Support Documentation			
No matches.			

Follow Up Information

Projected Follow Up Date	12 / 12 / 2024		
Follow Up User	UHC-Upstate CoC (886)	<input type="button" value="Search"/>	<input type="button" value="My Provider"/> <input type="button" value="Clear"/>
	UHC- Anna Johnson		
Follow Up Made	Yes		
Completed Follow Up Date	10 / 11 / 2023		

Need Information

Need Status *	Closed
Outcome of Need	Fully Met
If Need is Not Met, Reason	-Select-

Section 3 - How to Utilize Your Counts Report Tool

1. To edit the Counts Report tool, select the pencil icon on the top left of the Counts Box.

Edit Dashlet ✕

Top-Left

Top-Right

Bottom-Left


Bottom-Right

Report Name	Clients With An Entry But No Exit
Description	Lists all clients that have an Entry/Exit record for the specified providers with an entry date in the specified date range but no exit date

Filters

Select Dates	Start Date	End Date
All Dates	<input type="text" value=""/>	<input type="text" value=""/>
Provider Type *	<input type="radio"/> System Wide <input checked="" type="radio"/> Provider <input type="radio"/> Reporting Group	
Provider *	UHC-Project Care-Pride-PSH (13195) <input type="button" value="Search"/> <input type="button" value="My Provider"/> <input type="button" value="Clear"/>	
Including Subordinates	<input type="checkbox"/>	

2. Here you can navigate between the 4 quadrants and add up to 4 pieces of information. In the image above, I have set to view a list of all of the Active Clients in the Project Care-Pride-PSH program in my top left quadrant. This was done by selecting "Clients With An Entry But No Exit" in the report Name, selecting "All Dates" and selecting the Provider (or Project) I wanted the report to pull from. Below I'll list some other tools/ideas for information that can be added to these boxes.
3. The first section we'll look at is the Program Manager Reports Options. Here you can see you can view things line Clients Served, Shelter Stays Provided, and Services Provided.



Program Manager Reports

- Calls Taken
- Calls With Outstanding Follow Up Needed
- Clients Served
- Clients Served - Unended as One Day Services
- Clients With Current Entries
- In Progress Calls
- Items In The Approval Bin
- Services Provided (Non-Shelter Stays)
- Shelters At Or Above Capacity
- Shelters Below Capacity
- Shelter Stays Provided

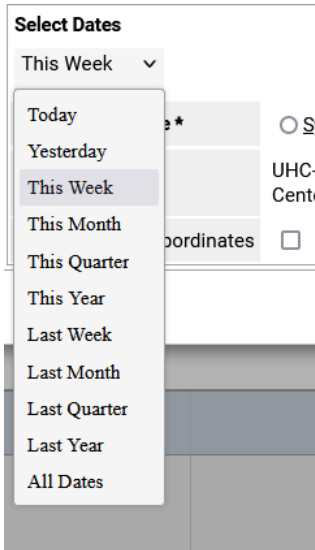
4. As an example, in the image below I have selected to view all of the clients with services provided in the last week, for UHC's Housing Resources Center. This will then populate a list for the last week's services provided.

Edit Dashlet ✕

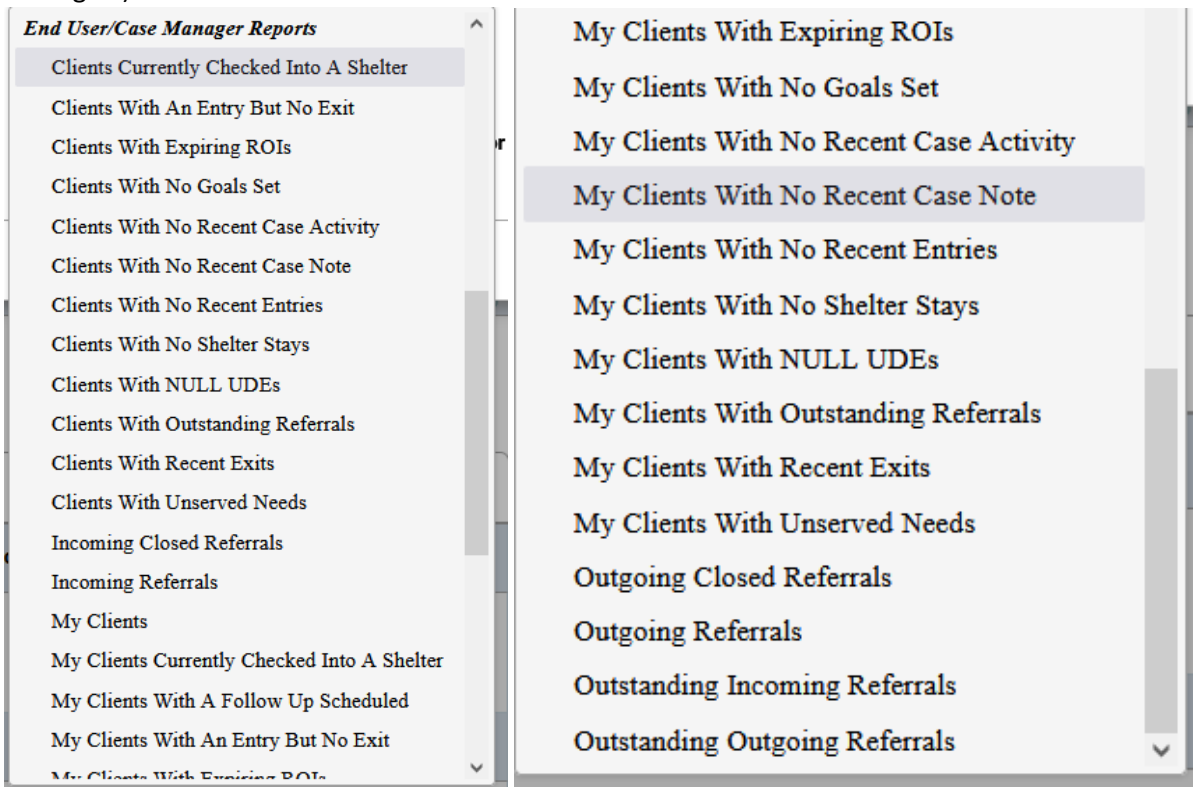
Top-Left	Top-Right	Processing... m-Left	Bottom-Right
----------	------------------	----------------------	--------------

Report Name	Services Provided (Non-Shelter Stays) ▼	
Description	Lists all services except shelter stays provided by the specified providers during the specified date range	
Filters		
Select Dates	Start Date	End Date
This Week ▼	10 / 29 / 2023	11 / 04 / 2023
Provider Type *	<input type="radio"/> System Wide <input checked="" type="radio"/> Provider <input type="radio"/> Reporting Group	
Provider *	UHC-UHC- Housing Resource Center (HRC) (16893)	<input type="button" value="Search"/> <input type="button" value="My Provider"/> <input type="button" value="Clear"/>
Including Subordinates	<input type="checkbox"/>	

Other timeframes are available for most reports, including this one:



5. The next section we'll take a look at is the Case Manager/Advocate Section (also useful for Program Managers).



6. As you can see there are many phenomenal options. It's just important you take the time to think through the time frame you want to select and what project/s you want to add. If you're doing your entire Agency, you can choose your Agency-Level project for the provider and also select "Including Subordinates." If you're wanting to look at a project on it's own, you must be sure to select the specific project under the Provider Type. If you would like multiple projects, but not your whole agency, your System Admin can put them in a

reporting group for you.

Edit Dashlet ✕

Top-Left	Top-Right	Processing... m-Left	Bottom-Right
----------	-----------	-----------------------------	--------------

Report Name	My Clients With An Entry But No Exit ▼
Description	Lists all clients that have an Entry/Exit record for the specified providers with an entry date in the specified date range but no exit date and have you listed as a current case manager

Filters

Select Dates	Start Date	End Date
All Dates ▼	/ /	/ /
Provider Type *	<input type="radio"/> System Wide <input checked="" type="radio"/> Provider <input type="radio"/> Reporting Group	
Provider *	UHC-UHC-Greenville SO (16701)	<input type="button" value="Search"/> <input type="button" value="My Provider"/> <input type="button" value="Clear"/>
Including Subordinates	<input type="checkbox"/>	

7. I recommend trying some of these items out when you have time and if you need any further assistance, please submit a ticket on our website.