

DRAFT – WellSky Provider Guide

Role = **BHDDH Provider or BHDDH Provider Supervisor**

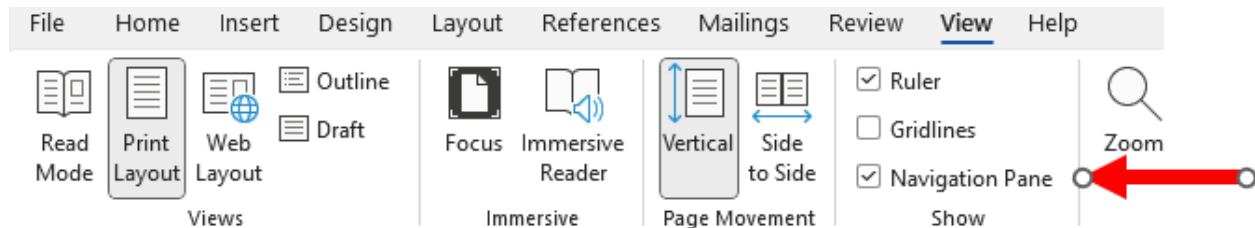
Logging In

Training Link: [Training Log In](#)

****Please be sure you are not using the link to Production (where real participant data is entered) when you are training.**

Production Link: [Production Log In](#)

Helpful tip for using this Guide – in word, click on **View** and then check the box next to **Navigation Pane**. This will bring up headers outlined in this document on the left-hand side. By clicking on a header, you can jump to different sections of the guide.




A **username** and a **temporary password** will be sent to you through email. Please look for an email from Sindi Terrien, Pam Mazzenga, or WellSky Support. After your first successful login using the temporary password, please update your password. If you need to reset your password or have **any technical problem**, please email:

BHDDH.WellSkySupport@bhddh.ri.gov


***Please note

- The link to the Production environment is different than training link above.
- Usernames in Training and Production are also different.
- Please DO NOT allow your computer to automatically save (i.e. using a vault) your username and password. This often creates problems with logins.
- WellSky functions on pop-ups. Each time you click on something, it will open a new window. For WellSky to work properly, you will need to **disable popups**.
- As a reminder, WellSky is a State Case Management system. It is not meant to serve as a day-to-day case management system for providers. Provider functions in WellSky are limited.

Getting Started

In upper right-hand side, click on the avatar to view your role 

Click the drop down to ensure your role = **BHDDH Provider (or BHDDH Provider Supervisor)**

- If you have additional roles, you will be able to click the drop down , select your role and then click **Apply**

Layout

Across the top right, you will see **Chapters** (= My Work, Participants, Providers)


The Chapters you see will depend on your role.

My Work = The My Work page is the first page you will see once you sign in. The page you see will depend on your role and your dashboard will be specific to you.

- Under **CMA/Service Provider** you will see participants open to your agency and that have been assigned to you as the primary worker. In the box, there will be rows based on Status. Click on **Open** (or **Clinically Eligible**) to view a list of participants. From the list of participants, click on participant name (or on a word or number in the row) to open the record.
- Under **Notes**, you will see Notes that have been shared with you. ***More on Notes Below***
 - Click on note status (i.e., **Complete, Pending**) to view a list of notes.
 - Find a note you want to view and click in the row to open the note.
 - Click on headers at the top to sort, if desired (=Participant, Note Type, Note Date, Note By, Status, View Record)
 - Click **View**, under View Record column to open participant record. **Record will only open if participant is open to your agency.**
 - If you **Mark as Read** (once in the note, click Tools, Mark as Read), it will remove the note from your My Work page (see more info below).

Participant – see all participants enrolled with your agency (all eligible for Medicaid /LTSS)

*If you just opened a participant record, then click on My Work or Provider and then click back on Participant, it will bring you back to the last participant record you had opened.


- If you want to find someone, you will need to **Search** using the magnifying glass  to the right of the Participant Chapter or the **Filter** feature under File

Providers – Shows information about your provider agency.

- Click on **Provider Chapter**, top right
- Click on the row that shows your Provider name
- Additional tabs will show at the top middle (Providers, OpenClose, Workers, etc.)
- Click on **Enrollments** to see a list of all participants enrolled in your agency
- Provider Chapter is where you will add information/update information regarding residential placements. See below for more information.

Also, at the top right (next to Chapter)

Bell Icon– shows any notifications you may have

Magnifying glass = Search Function 

You can search for records using either a **Quick Search** (=click on magnifying glass) or an **Advance Search** method.

Quick Search -

- In the **Quick Search** box (=clicking magnifying glass), enter search criteria you have available such as a participant name.
- Change the drop-down menu to select the **Chapter Menu** you want to search, such as Participant or Provider. This drop down will be limited to showing only those chapters available to you according to your role.
- Use the **Filter Menu** on the right-hand side, to the left of the chapter menu drop down. Use this drop down to select additional search criteria. The drop down has several options such as last name, DOB, etc.
- Once you entered your information and selected your filters, click the **Search** button to run the search. Results of your search will appear once the search is complete.
- You can sort each heading by clicking on the heading title.

Advanced Search –

- An **Advanced Search** may be completed when you want to narrow your search down. You can perform an Advanced Search by clicking the Advanced Search link to the right of the search button.
- The **Filter Box** opens, allowing you to narrow the search by specifying one or more fields to search.
- You may see drop down menus that indicate specific search requirements (operators) such as ‘contains’, ‘begins with’, ‘and’, ‘any’ and more.

- There are also many filter options to select from, such as last name, first name, SSN, DOB, and more.
- You can specify multiple criteria in the filter by using the **Plus (+)** sign to add more criteria.
- You can add additional search filters by using **'AND'** then adding another filter in the row below.
- You can then use the **close (X)** button to remove that row or clear all your filters by using **Reset**.
- Once you have the information you want to use to search with, click the **Search** button.

Helpful Hint –

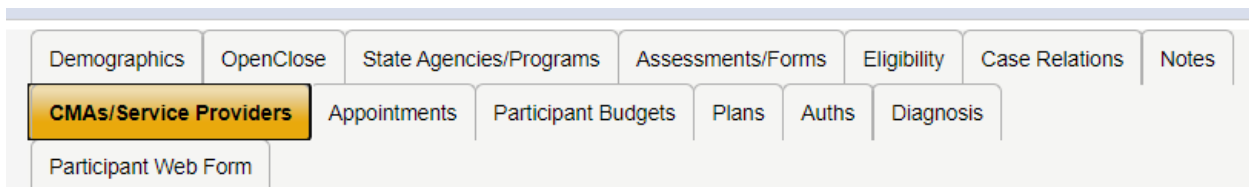
- It may be best to search using the least number of characters required (three) and an additional identifier.
- If someone has something in their name that could make searching difficult (hyphenated or two last names, an apostrophe, is a Jr) try entering three letters (after any apostrophe) and using the **contains** operator.
- For example, to search Silly O’Jilly (DOB: 01/01/1901) try searching
 - Last Name – Contains - JIL AND
 - First Name - Contains - SIL AND/OR
 - DOB = 01/01/1901

Participant Chapter

Select the participant record (by using search feature or through My Work page)

Upon opening Participant record, participant name will show on left side. Upon opening pages within record, name will show on right side.

Once the record opens you will see Tabs (starting with demographics) under participant’s name



Demographics – View Only

1. This tab will provide participant demographic information.
2. The address listed should be the participant’s **physical** address.
3. If there are additional addresses that have been entered, such as a mailing address, different from the physical address entered on the main face page, you will be able to view by clicking **Edit**, and then click on **Edit Demographics**

- a. **Currently, there is no way to indicate whether a participant has multiple addresses.
 - b. Although you are clicking Edit, this doesn't allow you to edit any information.
4. Click **Addresses** on left side menu
5. If there are additional addresses, they will show in a row(s).
6. Review address records and click on a row to view more information
7. To view additional phone numbers for the participant, clicking **Edit**, and then click on **Edit Demographics**
8. Click on **Phones** on the left side menu
9. If there are additional phone numbers, they will show in a row(s).
10. Review phone records and click on a row to view more information

*****Please note:** If you notice any changes that need to be made on the demographic tab (wrong spelling of name, an additional address to add, etc.), please inform the participant's CFCM or the state social case worker so that they can make the necessary changes.

*****Please note:** Bridges feeds WellSky so information may be different in WellSky vs. Therap.

OpenClose - [View Only](#)

1. Information in this tab is not relevant to Providers. Providers may wish to ignore this tab, if it shows.

State Agencies/Programs - [View Only](#)

1. Click on the **State Agencies/Programs** tab. In the row(s) that shows below, click on **BHDDH/IDD/HCBS**
 - a. This tab indicates whether the participant is open to BHDDH services. All participants that are assigned or referred to Provider agencies should be Open to BHDDH.
2. In this section, you can see the following information:
 - a. The participant's **SIS-A Tier** level and dates of scheduled SIS Interviews (past or future).
 - b. **Residential** information such as approved settings
 - i. You will only see information for those participants that have new Residential Needs
 - c. **Youth in Transition (YIT)** information such as status
 - i. Currently not in use
3. On the left side menu, click **Program Worker** to view current or past assigned state program worker(s).
 - a. Under Active column, you can view active workers (=Yes)
 - b. Under Primary Worker column, you can view the participant's primary worker (=Yes)

Worker Name	Start Date	End Date	Active	Primary Worker
[Redacted]	08/07/2024		Yes	No
[Redacted]	08/09/2024		Yes	No
Authorization, Service	11/14/2024		Yes	Yes

- i. **Authorization, Service** may be listed as the primary worker. This indicates that the participant has moved to a Conflict Free Case Manager.
- ii. **Independent Facilitator, [Name of IF]** may be listed as primary worker. This indicates that the participant has been assigned to an IF.

***NOTE: IFs are not currently in WellSky.

***If you have questions about who to contact, please email:
BHDDH.CFCM@bhddh.ri.gov

Assessment/Forms – [View Only](#)

1. Click on this tab to view additional information, assessments, and forms including:
 - a. BHDDH Additional Participant Data (participant data that migrated from Therap such as mobility, eating guidelines, supervision, etc.)
 - b. BHDDH Employment and Earnings Reporting (Internal)
 - c. BHDDH Residential Needs Assessment
 - d. BHDDH Residential Situations Assessment

Eligibility – [View Only](#)

1. This tab provides information regarding the participant’s Medicaid eligibility.

Case Relations – [View Only](#)

1. This tab provides information of individuals that have a relationship with participant (for example, mother, brother, lawyer, primary care physician, etc.). This includes those individuals named as **emergency contacts**.
2. Click on the **Case Relations** tab
3. A list of individuals associated with the participant will be listed in the table below. Information including name, relationship, contact information and whether the person is active and/or an emergency contact may show.
4. Click on the name of the person to view any additional information entered.

*****Please Note:** If changes or updates need to be made, please contact the current CFCM or state social caseworker.

Notes

For notes related to **submitting ISP/PCP and HRC Restrictive Intervention Approval** see separate section.

In notes, Providers are specifically able to:

[View existing notes](#)

1. You will only be viewing existing notes for participants enrolled in your agency.
2. To view a note, click on the **Notes** tab in the participant's record
 - a. Click on the note
 - i. Click on headers at the top to sort, if desired (=Note Date, Note By, Note Type, Note Subtype, Description)

[Receive/View a note that was shared with you and respond](#)

1. **Notes** that are initially shared with you will show as a **Pending or Complete Note** on your My Work Dashboard



File

WEB FORMS	PARTICIPANTS	REMINDER: TURN OFF POPUP BLOCKERS
Web Forms Alert Notes List >	State Agencies/Programs >	
Unread Alert Notes 0	Closed 1	
	In Progress 1	
	Ticklers >	
	Ticklers 26	
	CMA/Service Provider >	
	Clinically Eligible 2	
	Closed 3	
	Open 4	
	Notes >	
	Complete 1	
	Pending 13	

2. From My Work dashboard, under the **Notes** section, Click **Pending** (or other status)
3. All Pending Notes will appear in the table. Select a Pending Note to open and view details
4. **Note Type** will provide information regarding the type of communication (for example, Documentation, etc.).

- a. Note may include a note to review planned services (replaces PO). This **Note Type** = BHDDH DDO Note and **Note Subtype** = BHDDH Provider Planned Service Review.
5. In the gray section, below description, will be communication between recipients.
6. You can respond or add to the communication in the white box labelled Note, under **New Text**.
 - a. If note type = Person Centered Planning and Subtype = Provider Planned Service Review, please add message to acknowledge and agree to planned services entered in plan.

***** Please Note:** You are only able to add/respond to a Pending Note. Complete Notes will be view only.

7. Enter your response and then click the **Append Text to Note** bar below the New Text box. **Caution:** If you don't click the Append Text to Note bar, the system will not save your response.
8. This action pushes the text you added into the gray box, indicating your message has been added.

***** Please Note:** This does not save the text you appended. You need to go to **File – Save Note** to save the text you added.

9. Keep the Status as **Pending**.

*****Please Note:** Never click Confidential!

10. To add a recipient to the note, click **Lookup** under **Note Recipients**, next to **Add Note Recipient**.

*****Please Note:** Only those listed in note recipient grid with note status = Unread will receive the message. If you want the person who added you to the note to see your response, please be sure their name is listed in the Notes Recipient Grid.

*****Also,** if a recipient has marked the note as Read, then they will no longer see a Pending Note in their My Work chapter. You will need to add them again as a recipient for the note to show under Pending Notes in My Work chapter.

11. In the **Search Text** box, enter at least the first three letters of the recipient's last name
12. Click **Search** and select the recipient form the list of names
13. The recipient's name will now appear in the **Note Recipients Grid**. This grid displays all recipients that will receive the note.
14. Click **File, Save and Close Notes** ****If you don't save, the message will be lost.**

*****Please Note:**

Note By shows the individual that initially authored the note and not necessarily the person who shared the note last.

Note Date shows the date the note was originally created.

***** Please Note:** If you mark a note as read before a participant is enrolled in your agency, you will **NOT** have another way to get back to the participant record to view the note so please be cautious when marking notes as read.

- a. To mark a note as read, open the note
- b. Click **Tools** (to the right of File), **Mark as Read and Close**

[Attach a document to a note \(submitting ISP/PCP, plan amendment, and HRC Approvals\)](#)

*****Please Note:** This is how you will upload and share a **Person-Centered Plan (PCP/ISP), plan amendments, and HRC Restrictive Intervention Approval** in WellSky.

1. Add a note (Click **File, Add Notes**)
2. When Uploading an **ISP/PCP**, please select:
 - a. **Note Type** = BHDDH DDO Note
 - b. **Note Subtype** = BHDDH DDO Plan Submission
 - c. **Description** = [Participant Name] [ISP/PCP] [Dates of Plan]
 - d. **Status** = Pending
3. When uploading plan amendment, please use same note type/subtype as above with Note Status = Pending
 - a. **Description** = [Participant Name] [Plan Amendment] [Dates of Amendment]
4. When Uploading **HRC Restrictive Intervention Approval** (for reporting purposes, please add as a separate note and **not** as an attachment with the ISP/PCP), please select:
 - a. **Note Type** = **BHDDH DDO Note** and
 - b. **Note Subtype** = **BHDDH HRC Restrictive Intervention Approval** for this documentation submission.
 - c. **Description** = [HRC Approval] [Date]
 - d. You can add social caseworker to Note, but you don't need to.
 - e. **Status** = Complete (status = Complete for HRC Restrictive Intervention Note only. All others will have status = Pending)
5. Under the Note box, there is a section for **Attachments** (to include plan, PO and other supporting documents)
6. Click **Add Attachment** (blue hyperlink)
 - a. Click **Choose File**
 - b. Select the document from the saved location on your computer
 - c. Click **Open**
 - d. Complete the **Description** text box
 1. Include helpful information such as [participant name], [date], [what the document/note is about]

2. For **PCP/ISP** plans, in **Description** field enter: [Name] [ISP/PCP] and [plan dates of ISP].
3. For **HRC Restrictive Intervention Approval**, in **Description** field enter: [HRC Approval] [Date]
- e. Select the **Category** from the drop-down menu
 1. Select BHDDH Other when uploading PCP/ISP or HRC Approval
7. Click **Upload**
 - a. Your attachment will now be listed under **Attachment Grid**
8. To add a recipient to the note, click **Lookup** under **Note Recipients**, next to **Add Note Recipient**.
 - a. As of 9/29/2025, when uploading a PCP, add the state review team contact (a list of contacts will be provided).
 - b. State review team will respond with approval or denial of plan in Note Text box.
 - c. Plans from Independent Facilitators that the Fiscal Intermediary uploads as Note, please add state review team contact as recipient.
9. In the **Search Text** box, enter at least the first three letters of the recipient's last name
 - a. Click **Search** and select the recipient from the list of names
 - b. The recipient's name will now appear in the Note Recipients Grid. This grid displays all recipients that will receive the note.
- 10. Click File, Save and Close Notes. **If you don't save, the message will be lost.**

CMA/Service Providers

1. To View all CMA/Service Providers/Workers
2. Click on **CMA/Service Providers**. You will see a list of licensed DDOs and Case Management Agencies associated with the participant.
3. To view additional details, including workers assigned to the participant within an agency, click on the agency name in the row
4. On the left menu, click **CMA/Service Provider Worker** to see worker information.
5. To change the Primary Worker for your agency

****Please Note:** this function is only available for supervisors in the Provider Supervisor role). Click in the row where you see your agency name.

 - a. On left side menu, Click on **CMA/Service Provider Workers**
 - b. Click on **File, Assign CMA/Service Provider Workers**
 - c. Next to **Worker Name**, click **Lookup**
 - d. In the box to the right of **Search Text**, enter at least three letters of the worker's last name
 - e. Click **Search**
 - f. Click on worker name from the names listed
 - g. Click **File**, and then select **Save and Close Referral Worker**
 - h. The name should now appear in the table.

- i. To indicate the staff is Primary Worker, **check the box** (unmarked in the right most column) at the end of the row
- j. Click **Tools**, and then select **Designate as Primary**
- k. Click **Close CMA/Service Provider Worker**

Appointments– View Only

Participant Budgets– View Only

- 1. This tab provides information about the participant’s budget.
- 2. To view more information regarding a particular budget, click in the row (click on a word or number in the row).
- 3. Currently, not fully in use.

Plans– View Only

- 1. Click on **Plan** tab (migrated plans may show in Notes Tab as an attachment)
- 2. Below you will see any plans associated with the participant.
- 3. Click on a plan listed in the records listed to view more information
 - a. You can sort using the headers
- 4. Once you have selected a plan, from the left side menu, navigate to view additional information regarding the plan
 - a. **Plan information** – provides a general overview of the plan (is like a cover sheet)
 - b. **Plan form** – this contains any version of the plan itself. Click on the version you wish to view to see details including goals, important TO/FOR me, Informal Supports, Crisis, and Safety Plans, etc.
 - c. **Risks** – any identified risks and objectives associated with the risks
 - d. **Planned services** – any planned services details including the provider (if identified), the units, cost and more.
 - e. **Plan Notes and Follow Up** – any notes associated with the plan
 - i. Includes Note Type = Person Centered Planning
 - ii. Note Subtype = Provider Planned Services Review. This is a note send by the CFCM to the Provider to ensure everyone agrees with the details of planned services.
 - iii. May include a note with the PO
 - f. **Linked budget** – the budget that is linked to the plan.

Auths– View Only

- 1. This is where you will view any approved service authorizations

Diagnosis– View Only

1. This tab provides information on all diagnoses entered and associated with the participant.
2. If there are additional diagnoses to add or change, please contact the CFCM or state.

Note Types:

Note Type	Note Subtype	When to use	Which Participant
BHDDH DDO Note	BHDDH DDO Plan Submission	Uploading participant PCP/ISP and any additional documentation related to the PCP/ISP for state to review *Self-Direct uploaded by FI, please add Mary Beth Stevens *For participants who are not self-direct, please add state social case worker as note recipient.	Actual participant record
BHDDH DDO Note	BHDDH HRC Restrictive Intervention Approval	HRC Restrictive Intervention Approval used for uploading HRC Restrictive Intervention Approval documentation.	Actual participant record
BHDDH DDO Note	BHDDH Provider Planned Service Review	CFCM is sharing plan for provider to review and acknowledge they have reviewed planned services	Actual participant record