WISCONSIN DEPARTMENT *of* HEALTH SERVICES

Division of Public Health—Bureau of Aging and Disability Resources

WellSky/SAMS

Navigation and Formatting Guide

Benefit Specialists

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WellSky/SAMS Navigation and Formatting Guide

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Introduction

The WellSky Aging and Disability database application is used to track client activities conducted by disability benefit specialists (DBS) and elder benefit specialists (EBS) at aging and disability resource centers (ADRC) and aging units in counties and tribes throughout Wisconsin. Throughout this guide, the database application will be referred to as WellSky or WellSky/SAMS.

ADRC specialists and other ADRC staff including supervisors, receptionists, resource database staff, and outreach staff; tribal aging and disability resource specialists (tribal ADRS); and dementia care specialists use a separate set of WellSky/SAMS guides to record client tracking contacts and activities.

Account Access

Access to WellSky/SAMS is restricted to account holders authorized by the Department of Health Services. Though a single system is used statewide, **users may only access data entered by staff within their local agency**. If there are multiple users at the same local agency with the same data access permissions, those users will be able to view each other's data entries and modifications. Further access restrictions are based on state DBS and EBS program policies about client confidentiality.

Notes about the Navigation and Formatting Guide

This guide is designed to provide the basic tools to allow users to learn how to navigate through the WellSky/SAMS database, view information, and create a customized view. Because WellSky/SAMS is widely used in many governmental health departments and agencies throughout the country, many features exist that are not applicable for use by benefits specialists in Wisconsin. Therefore, this guide also contains recommendations for customizing the appearance of WellSky/SAMS, allowing users to focus as much as possible on uses that are relevant to their job functions. **Please note, database formatting changes made by you will apply only to your database view (as identified by your login username), and not to other users with access to the same data**.

Within this guide you'll find hyperlinks from the table of contents to key sections of the document as well as additional hyperlinks within the document itself.

Users will be exposed to a number of new terms used to describe features and options of the database. Although in this guide we have attempted to be consistent with terminology used in the WellSky/SAMS Online Help Guide, terminology within the Online Help Guide itself is not always consistent. In Appendix A, found at the end of this guide, you will find commonly used terms and corresponding definitions.

Learning Objectives

- Learn how to navigate WellSky/SAMS using database features and tools.
  - Main screen
  - List screens showing all accessible records
  - Record screens showing individual records
- Learn which features, screens, and data fields are relevant.

- Learn how to customize the look and functionality of your database view.

Additional WellSky/SAMS Reference Guides and Resources

For Benefit Specialists

- Browser Configuration and Login Guide
- Data Entry and Case Tracking Guide
- Guide to Generating Reports
- Quick Guide
- WellSky/SAMS Online Help Guide (located with the database)

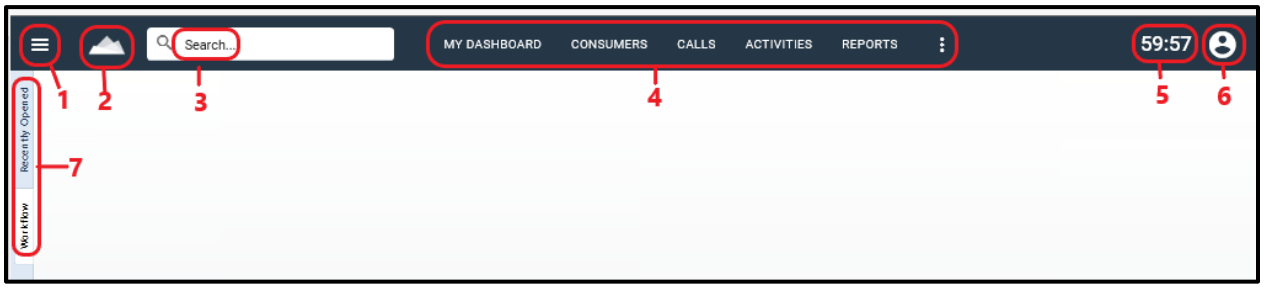
For ADRC, Tribal ADRS, and DCS

- Browser Configuration and Login Guide
- WellSky/SAMS Navigation and Formatting Guide for Aging and Disability Resource Centers, Tribal Aging and Disability Resource Specialists, and Dementia Care Specialists
- WellSky/SAMS Data Entry Guide for Aging and Disability Resource Centers, Tribal Aging and Disability Resource Specialists, and Dementia Care Specialists
- WellSky/SAMS Guide to Generating Reports for Aging and Disability Resource Centers, Tribal Aging and Disability Resource Specialists, and Dementia Care Specialists
- Client Tracking System Requirements Technical Assistance document

I. Main Screen

A. Navigating the Main Screen

Upon logging in to the database, your default screen will display similarly to the screenshot below (feature identifiers are noted in red and correspond with the numbered items in section I.A. below).



1. Navigation History

Clicking on the icon with three horizontal bars will open a history of database screens you've visited since logging into the database application.

2. WellSky Icon

Clicking on the WellSky icon will close any of the main List Screens (Consumers, Calls, Activities) that are currently open and allow you to unhide individual Record Screens that are open, but hidden behind them.

3. Search Bar

WellSky/SAMS contains search functions that allow you to search *Consumer Records* to quickly find required information. WellSky/SAMS offers two *Search* modes:

- **Quick Search** (typing first or last name, or *Client ID* in the *Search Bar*)
- **Advanced Search** (clicking on the magnifying glass icon in the *Search Bar* will open the *Advanced Search* feature.*)*

All searches are limited by security permissions to only those *Consumer Records* the user is allowed to see.

4. Main Navigation Bar

The *Main Navigation Bar* provides access to the main areas in the database. The *Main Navigation Bar* consists of the following options:

a. Consumers

Also known as "clients," *Consumers* are people who receive or who may receive services from you or others in your agency. *Consumers* include direct care recipients as well as their authorized representatives. In WellSky/SAMS, the *Consumers* area manages client demographic and other important client information. Access to *Consumer Records* is limited to the agency and provider who delivers services to the *Consumer*. Clicking on the **Consumers** option in the *Main Navigation Bar* will display the *Consumer List*

S*creen*. In this screen, you'll see a list of all *Consumer Records* located in your agency. This list can be filtered for customized results. Also in this screen is a menu of actions for adding, deleting, editing, printing, and exporting *Consumer Records*.

b. Activities

Entries in this feature are used to track disability determination case stage information and also serve as "to-do lists" of items you have identified as follow-up tasks related to your *Consumer* and *Call Records*. Entering *Activity* information is **required** in disability cases, but is otherwise optional. Clicking on **Activities** in the *Main Navigation Bar* will display the *Activities List Screen*. In this screen, you'll see a list of all *Activities* for C*onsumers* located in your agency. This list can be filtered for customized results. Also in this screen is a menu of actions for adding, deleting, editing, printing, and exporting *Consumer Activity Records*.

c. Reports

Reports provide useful information in a variety of areas, such as tracking *Consumer Cases*, checking for data entry errors, and generating program statistics. A number of report templates have been created for your use, but you are also able to create your own. Clicking on **Reports** in the *Main Navigation Bar* will produce a list of all report templates available for your use. This list can be filtered for customized results. A separate *Guide to Generating Reports* discusses the reports feature in more detail.

d. Tools

Tools allow you to:

- Print blank SHIP assessment forms
- View your SHIP exports
- View your SHIP-GAM events

When hovering your cursor over the **Tools** link in the *Main Navigation Bar*, you'll notice a small downward pointing triangle (or dropdown arrow) appears. By clicking on the **dropdown arrow**, the three selection choices referenced above will appear.

e. Calls

This feature maintains records of contact with clients or their authorized representatives. When hovering your cursor over the **Calls** link in the *Main Navigation Bar*, you'll notice a small downward pointing triangle (or dropdown arrow) appears. By clicking on *Calls*, a pop-up window with two selection choices appears:

- **New Call:** Selecting this option will open a new window for the purpose of adding a record of a new *Consumer Call*.
- **Calls:** Selecting this option will display the *Call List Screen*. In this screen, you'll see a list of all *Call Records* for *Consumers* located in your agency. This list can be filtered for customized results. Also in this screen is a menu of actions for adding, deleting, editing, printing, and exporting *Consumer Call Records*.

f. Saved Searches

Saved searches allow for the selection of multiple filter options to quickly display a list of custom searches you have created and saved.

g. My Dashboard

This feature can be configured to provide you with a summary page that displays *Consumer* information pertinent to your cases, such as *Activities Due*, *Assessments Due*, or a list of all of your clients. It can also be configured to display automatically upon login to WellSky/SAMS. Setting up your dashboard is optional. Clicking on the *My Dashboard* tab in the *Main Navigation Bar* will display your selected dashboard items.

h. Menu Settings

Menu Settings allows you to customize the look and order of the items displayed on your *Main Navigation Bar*.

i. More

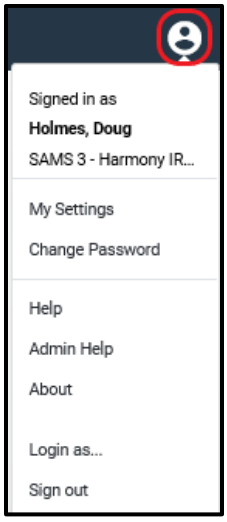
Open items that you have chosen (through *Menu Settings*) to not display on the *Main Navigation Bar*.

5. Timer

WellSky will automatically log you out of the database there has been no activity for one hour. The timer displays the time left before being automatically logged out.

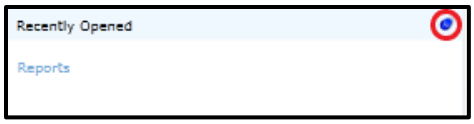
6. System Controls Menu

This menu provides tools to customize your settings, access the searchable *Help* resource area, change your password, login to a different database without logging out of the portal (using *Login as…*), and sign out of the database. By clicking on the **circular icon** in the upper right corner of the *Main Screen*, the following menu options appear:



7. Sidebar

The *Sidebar* area on the left side of the screen has tabs that contain a list of *Recently Opened* items and *Workflow* items (specifically SHIP assessment forms) to be completed. The *Sidebar* can be hidden or displayed by clicking the **blue push pin** icon.



B. Formatting the Main Screen Features

1. Sidebar

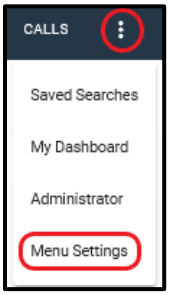
It is recommended to unpin the *Sidebar* in order to display more screen space for better viewing. To unpin the *Sidebar*, click on the **blue push pin** icon located within the opened *Sidebar* panel. Once unpinned, the *Recently Opened* and *Workflow* Tabs will display along the side instead of along the bottom, providing a larger *Work Area*. In order to display the *Sidebar* again to view recent *Activities* or workflows, hover your cursor over the tabs, and the *Sidebar* will open temporarily. If you would like the *Sidebar* to display longer, re-pin the *Sidebar* open again.

2. Main Navigation Bar

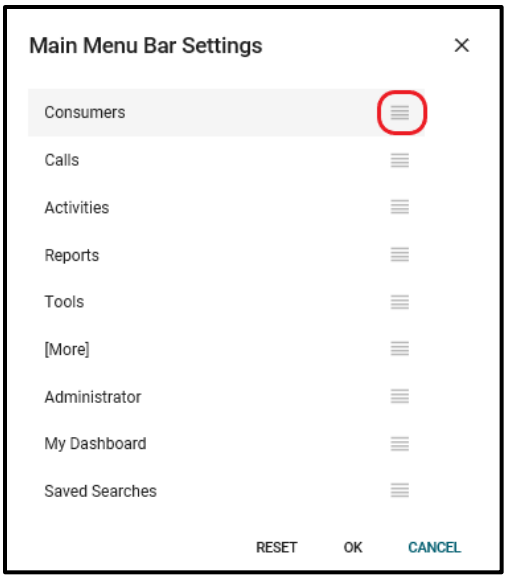
The look of your *Main Navigation Bar* can be customized based on your preferences. You can choose which *Navigation Bar* options are displayed, the order in which they are displayed, and which options you wish to remain hidden from view. Below is a screenshot showing a commonly used configuration.

To customize the appearance of your *Main Navigation Bar:*

a. Click on **Menu Settings,** located on the *Main Navigation Bar*. (*Menu Settings* might be hidden, so click on the **three vertical dots** in the *Main Navigation Bar* if you don't see it displayed.)



b. After clicking on **Menu Settings**, the following pop-up box will appear:



c. Every option that appears above *[More]* will display on the *Main Navigation Bar*. All options below *[More]* will be hidden.

d. To change the order in which the items appear, hover your cursor over the horizontal bar icon next to the option you would like to move, as shown in the screenshot above, until you see arrows pointing in all four directions.

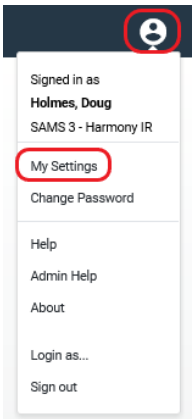
e. Right click on the mouse, holding the mouse button to drag and drop your selection to reposition it.

f. When you have created the configuration you desire, click **OK**.

3. My Settings

WellSky/SAMS allows users to configure how certain information is displayed and to establish default settings used to auto-fill selected items in forms and display screens you'll be using throughout WellSky/SAMS.

a. Go to the **System Controls Dropdown Menu** on the *Main Screen* and select **My Settings**.



b. In the *My Settings* window, modify **only** the settings as instructed below:

- **Grid Settings**
  - *Font*: Use this field to change the font and size of the font (default is set to Arial 12 point). It is recommended to **increase font size to 14** for better viewing.
  - *Alternate Row Background Color*: Use this field to change every other row to a different color (default is set to white). It is recommended to **modify to gray** for better viewing.
- **Default Settings**
  - *Agency*: From the dropdown list, select the agency that represents your area.
  - *Provider*: Select the green **open dialog box** within this field to display the agency that represents your office. Use only the agency office; do not choose your name as the provider. **Click on the provider to select it**, then click on the **OK** button.
  - *Care Manager*: From the dropdown menu for *Care Manager*, **choose your name** as the benefits specialist assigned.
  - *State*: Select **WI** for our state (this can be modified in a client record if needed).
  - *County*: select the **county you primarily work with *Consumers* in** (this can be modified in a client record if needed).
  - *Area Code*: Enter **the primary area code** to associate with phone numbers (this can be modified in a client record if needed).
  - *Export SHIP – Beneficary Info*: **Do not check the box.**
  - *Export SHIP – Representative Info*: **Do not check the box.**
  - *Include SHIP – Send to SMP*: **Do not check the box.**
  - *Module* (optional): This feature allows you to select a default screen that will display each time you login to the database.
- **Care Plan Settings:** There is no need to modify any of the default value settings in this section.
- **Assessment Settings:** There is no need to modify any of the default value settings in this section.
- **I&R Settings**
  - *Related Calls*: This field should be set to display **Show calls from just the *Consumer*.**

c. After updating your default settings, click on the **Save and Close** link at the top left of the screen.

4. My Dashboard

Setting up *My Dashboard* is optional. To set up *Activity* lists in *My Dashboard:*

a. Click on **My Dashboard** in the *Main Navigation Bar*. A blank *My Dashboard Screen* will open.

b. Click on **Add Widget,** and a list of dashboard panels will appear.

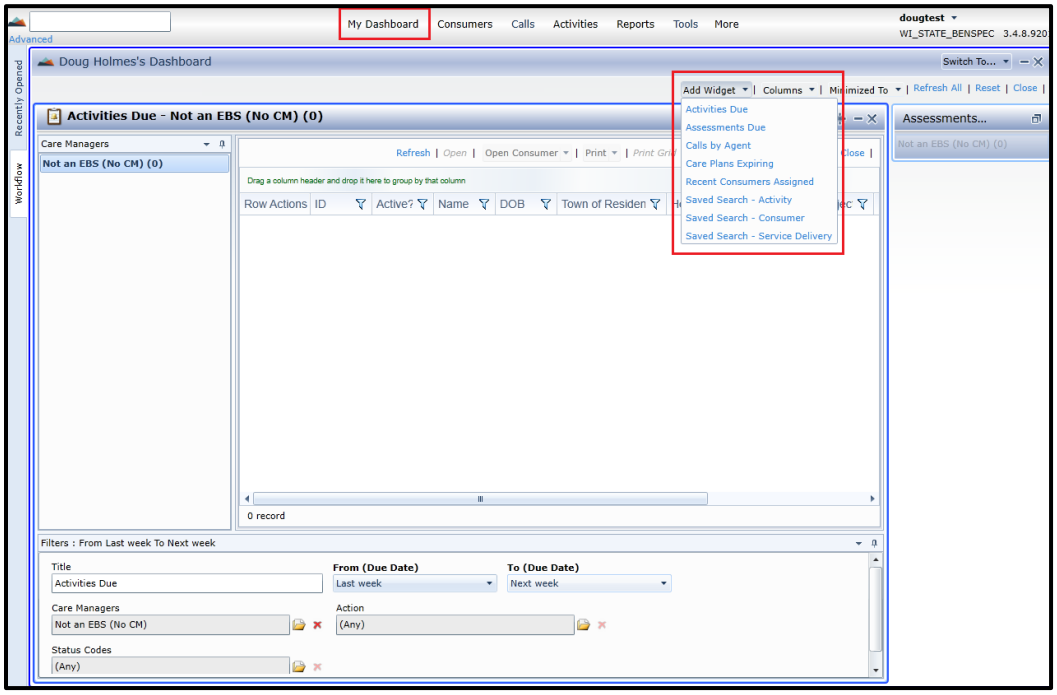
c. By selecting any of the items from the dropdown list of options, the selected panel will automatically be added to *My Dashboard*.

d. To remove an item from *My Dashboard*, click the **(X)** in the upper right corner of the

panel you wish to delete.

e. You will be asked to confirm this action.

See the screenshot below which highlights the areas necessary to complete the steps described in this section.



II. List Screens

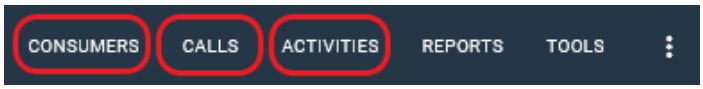
A. Navigating the List Screens

This section of the guide will focus on only three *List Screens:*

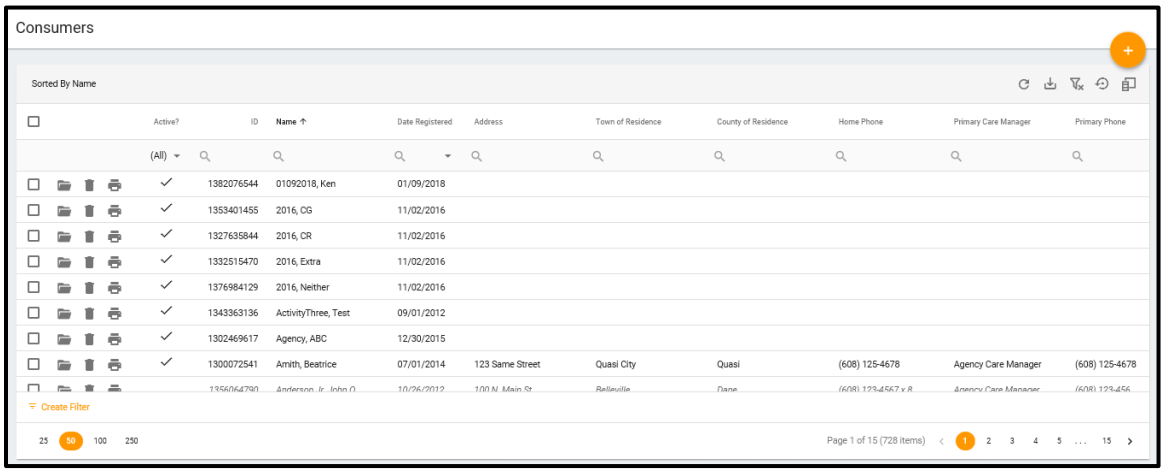
- *Consumers List Screen:* This screen contains the master list of all *Consumer Records* for which you have access permissions.
- *Calls List Screen*: This screen contains the master list of all *Call Records* for which you have access permissions.
- *Activities List Screen*: This screen contains the master list of all *Activity Records* for which you have access permissions.

1. Accessing List Screens

To view each of the *List Screens*, click on the corresponding option in the *Main Navigation Bar*.

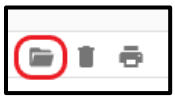


All *List Screens* are structured like a typical spreadsheet and will look similar to the screenshot example below. Individual *Consumer* and *Call Records* are displayed in rows. The top or header row contains *Data Field* columns, which can be sorted, filtered, and customized for display. Information on customizing the *Data Field* columns will appear later in this guide.



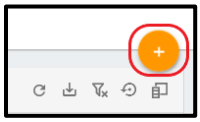
2. Opening Existing Records

To open an individual *Consumer* or *Call Record*, click on the folder icon or double click anywhere in the row of the record you wish to open.



3. Adding New Consumer and Call Records

Clicking on the circular icon with a plus sign allows users to add a new *Consumer* or *Call Record* from the corresponding list screen.



4. Sorting Data Records

Your data records will always be sorted in ascending or descending order based on the field selected to sort your data. The field selected will be denoted by an arrow located in the header row of your grid.

Any field may be selected to sort your data. To customize your sort preference:

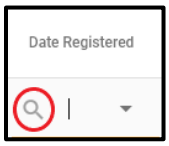
a. Click on the column heading you would like to use to sort your data.
b. An arrow will appear to the right of the data field you've selected.
- Arrow pointing up means data is sorted in ascending order.
- Arrow pointing down means data is sorted in descending order.

c. To change from ascending to descending order or vice-versa, click in the header row of the sort column again. The arrow should now point the opposite direction of what it was before.

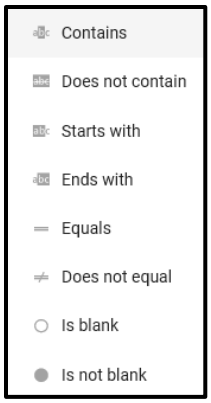
5. Filtering Data Records

Data in the *List Screens* can be filtered to temporarily exclude records you don't want to display by placing limiting conditions on one or more data fields. There are two ways to filter your records:

- **Simple Filtering**
  a. Hover your cursor over the *Filter* icon (which looks like a magnifying glass) located just below the header row of the *Data Field* column you wish to filter. Multiple data fields may be filtered simultaneously.



  b. A list of available filtering conditions for that field will appear.

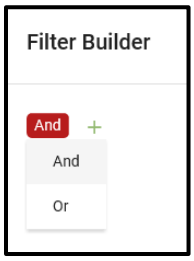


c. Select the parameter condition you wish to apply to your filter.
d. Free-form type your desired filtering parameter value(s). In some data fields such as when selecting dates, there is an option to select from a dropdown menu denoted by a downward pointing triangle found next to the filter icon.
e. The filter will be automatically activated after you've added sufficient information to your parameter.

- **Complex Filtering**

a. Select **Create Filter** located on the lower left section of your screen.

b. A *Filter Builder* window will open allowing you to select your filtering conditions and parameters.
c. Click on **And** to select either **And** or **Or**.

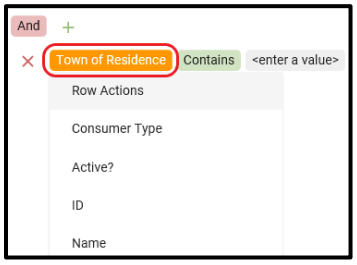


- Select **And** to restrict your filter to meet all conditions and parameters applied
- Select **Or** to allow display records based on either of the conditions and parameters applied.

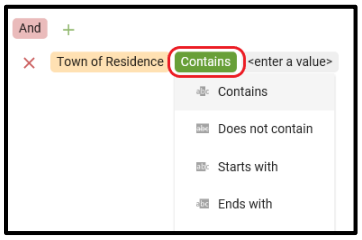
d. Click on the **Plus Sign** icon to select either Add Condition or Add Group.
- Selecting **Add Condition** allows you to select the data field, condition, and parameter you wish to filter by.
- Selecting **Add Group** allows you to create a sub-filter after selecting your primary filters using the *Add Condition*. Using the *Add Group* option can be somewhat complex and beyond the scope of this guide. Contact

DHSBADRtech@dhs.wisconsin.gov if you need assistance with utilizing this function.

e. Select the field you wish to filter



f. Select the parameter condition you wish to apply.



g. Enter the parameter value(s) you wish to apply.

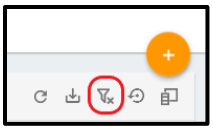
h. Click on the **Green Plus Sign** to add additional conditions or groups as desired.

i. Click on **OK** in the lower right section of the *Filter Builder* window after selecting all of the desired parameters.

6. Clearing Filters

Leaving unwanted filters in place is a common reason for being unable to view all records. Your filter(s) will remain in place (even if you close and re-open the filtered *List Screen*) until you either:

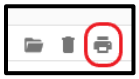
- Select the **Clear All Grid Filters** icon



- Or, hover over your *Filter* icon and select **Reset** from the displayed list of options.

7. Printing Individual Records

To print an individual record, select the P**rinter** icon in the row of the record you wish to print.



8. Deleting Individual Records and Merging Duplicate Consumer Records

To delete an individual record, select the **Trashcan** icon in the row of the record you wish to delete.

When you have multiple records for the same *Consumer* that contain sizable data (for example, multiple call records and assessments), rather than delete the duplicate *Consumer Record(s)*, users may wish to merge these records in order to preserve data contained in each record. To merge *Consumer Records*:

DBS:

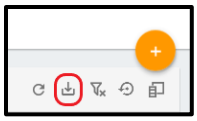
- All DBSs should submit the WellSky Client Merge Submission Request. Note that records created prior to February 2020 which were migrated from the old DBS Database will not be merged through this process.

EBS

- EBSs in Dane County should consult with their local supervisor at the area agency on aging.
- All other EBSs that use WellSky should submit the SAMS Consumer Merge Request form found on GWAAR's website. Click on the "Live Webinars and Library" link located in the "Webinars and Instructional Materials" section of the page.

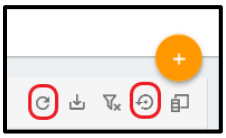
9. Exporting Displayed Records to Excel

Click on the Export grid icon, denoted by the downward pointing arrow , to export the contents of your *List Screen* to an Excel spreadsheet. Data can be saved to a safe location in your computer as you would any similar spreadsheet file.



10. Refreshing Data and Restoring Default Settings

- **Refresh the grid data**: Clicking on the circular arrow icon refreshes the data displayed in the screen.
- **Reset grid to default settings**: Clicking on the circular arrow icon with a plus sign in the middle will restore any formatting changes you've made to the screen to the original database default settings. Users will likely never need to use this option.



11. Page Navigation

Large lists will exceed the maximum number of records displayed per page. WellSky/SAMS provides page navigation controls to allow users to go to a specific page in the list by number; display more page numbers; and go to the first page, last page, previous page, or next page. The page navigation tool is located at the bottom left of the *List Screen*.

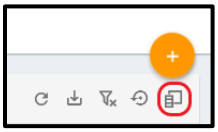
B. Formatting the Main List Screens

Note: For screenshots of recommended configurations of *Consumers*, *Calls*, and *Activities List Screens*, see *Suggested List Screen Formats* below.

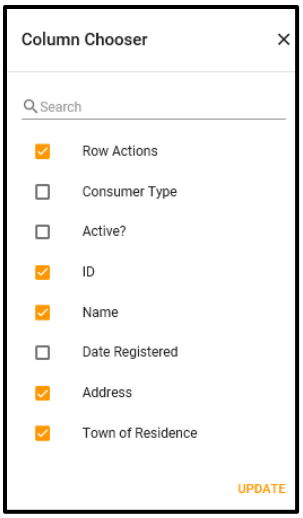
1. Displaying and Hiding Data Fields.

Most *Data Fields* can be displayed in list columns or hidden from view. To display or hide individual *Data Fields*:

a. Click on **Customize the displayed grid columns icon**.



b. A *Column Chooser* pop-up window will appear, similar to the screenshot example below.



c. Fields with a check mark will be displayed on your *List Screen*, unchecked fields will be hidden from display.
d. Click **Update** to save your changes.

2. Changing the Display Order of Data Fields

To change the order in which your *Data Fields* display in the *Data Field* columns, "drag and drop" the fields within the *List Screen*.

a. In the column header row, click and hold on the *Data Field* column you wish to move to a different position. Do not release your mouse click.
b. Drag the selected field to an area in between the columns where you would like to place the field. You will see the selected cell moving as you drag it.
c. Release your mouse click and the field should now be re-positioned.

3. Changing the Column Width

The amount of information contained in a data field will vary from column to column. To adjust your column width to more closely align with the amount of space taken up by the data in that column:

a. In the column header row, hover your cursor over the vertical line in between two columns and to the right of the column you want to resize.
b. A horizontal bar with an arrow pointing left and an arrow pointing right will appear.
c. Click, hold, and drag the double arrow left or right, depending on whether you want to increase or decrease the column width. Remember, you are adjusting the size of the column located to the left of your double arrow cursor.
d. Release the held mouse click when the column is the desired width.

4. Suggested List Screen Formats

Following are the *Data Fields* that are recommended to be displayed in your *List Screens*. The order in which they appear is up to your own personal preference. Below are commonly used configuration options for the *Consumers, Calls, and Activities List Screens.* The fields are listed in recommended order of appearance on your screen, left to right. Use the Column

Chooser pop-up window to select the fields. Drag and drop the fields to reposition the order of the fields on your screens.

a. Consumers List Screen

- ID
- Name
- Date of Birth
- Age
- Primary Phone
- Address
- Town of Residence
- County of Residence
- Primary Care Manager

b. Calls List Screen

- Start Date/Time
- Caller
- Consumer
- Caller Type
- Has Notes
- Date Created
- Create User
- Last Updated

c. Activities List Screen

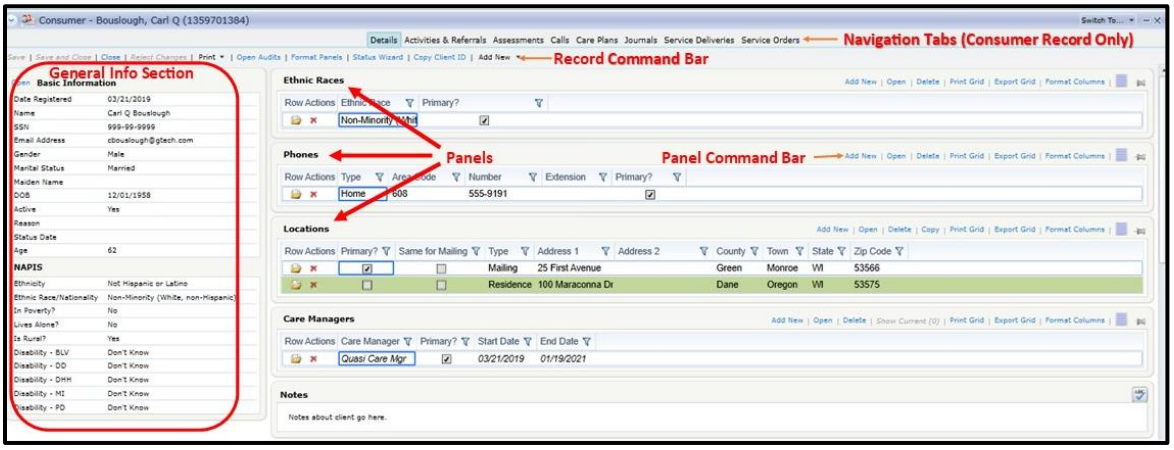
- Start Date
- Consumer Name
- Client ID
- Subject
- Action
- Status
- Reason
- Status Date
- Due Date
- Date Completed
- Primary Care Manager

III. Record Screens

A. Navigating the Individual Record Screens

This section will focus on the individual *Record Screens* for *Consumers, Calls, and Activities*. To open an individual *Consumer, Call, or Activity Record*, open the desired *List Screen* from the *Main Navigation Bar*. Either click on the **folder icon** on the *Row Actions* column of the individual record you wish to open, **or** click anywhere in the row of the record you wish to open. Alternately, *Consumer Records* may be opened by entering a *Consumer* name or *Consumer ID* in the *Search Bar* of the *Main Screen*.

The *Consumer Record – Details*, *Call Record*, and *Activities Record Screens* contain a similar layout. All contain a *Record Command Bar*, a *General Information* section on the left side of the screen, and *Panels* containing additional information located on the right side of the screen. Most *Panels* also contain their own *Command Bar* with the *Panel*. The *Consumer Record – Details Screen* (shown below) also contains *Navigation Tabs*, which provide access to all *Activity*, *Assessment*, and *Call Records* related to the individual *Consumer* whose record you're viewing.

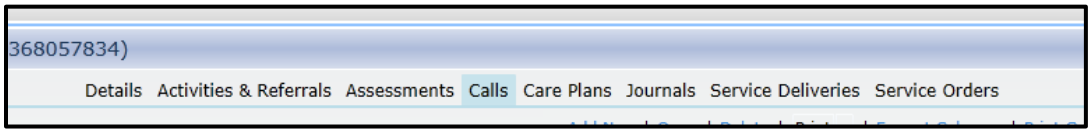


1. Consumer Record Screens

After opening an individual *Consumer Record*, there are four *Consumer Record Screens* that you'll be working with:

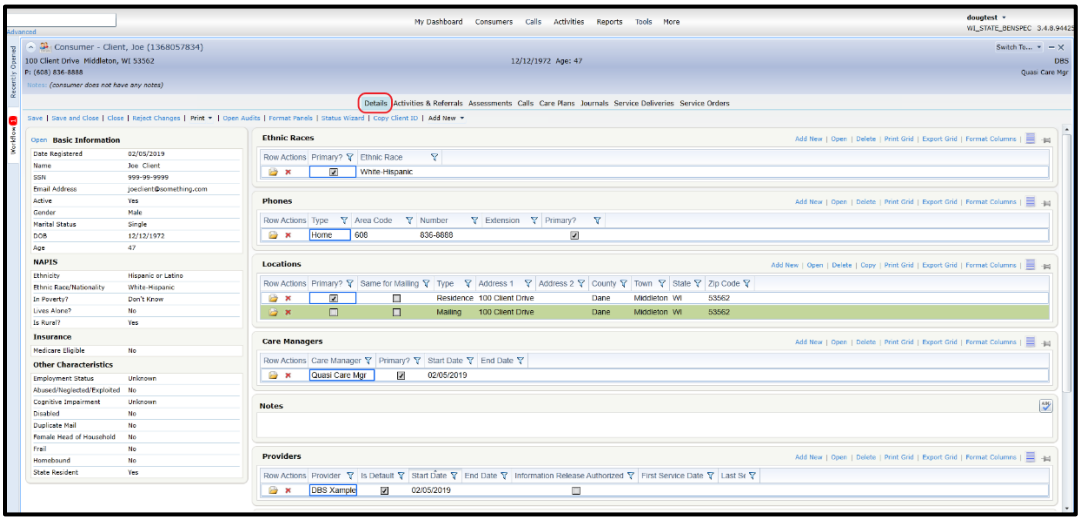
- *Details*
- *Activities & Referrals*
- *Assessments*
- *Calls*

Each of these screens can be accessed by clicking on the corresponding tab located on the *Consumer Navigation Bar* shown below.



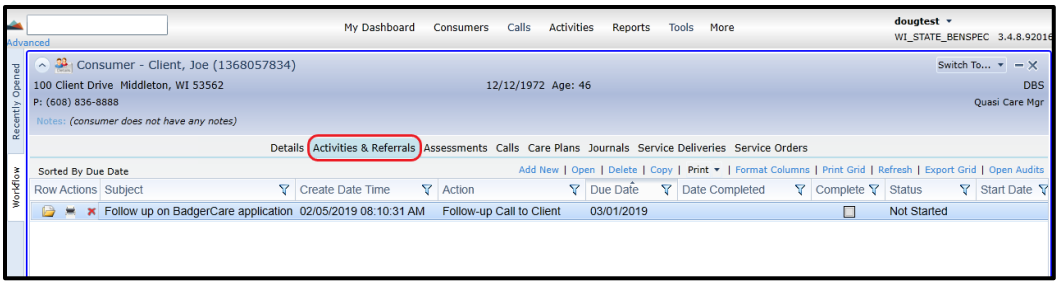
a. Consumer Record—Details

The default screen for an individual *Consumer Record* is shown below. On the left side of this screen, you'll find the *Consumer's* demographic information, categorized as **Basic, NAPIS**, **Insurance,** and **Other Characteristics**. On the right side are several additional information panels, which include **Ethnic Race**, **Phones**, **Locations**, **Care Managers**, and **Notes**. The remaining panels shown on the right side of the screen are of limited value, but cannot be removed.



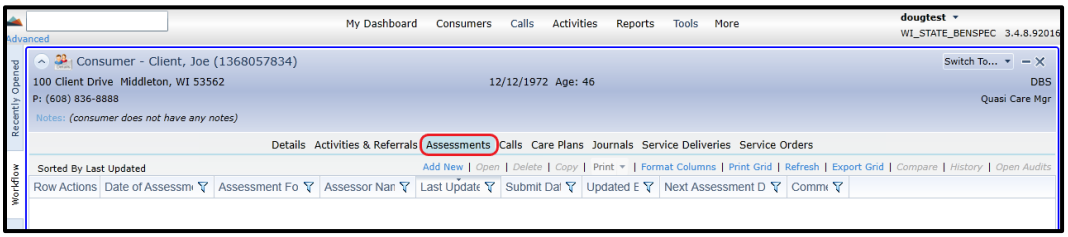
b. Consumer Record—Activities & Referrals

Click on the *Activities & Referrals Tab* within the *Consumer Record* to access this screen, which provides a list of all *Activities* associated with the selected *Consumer*.



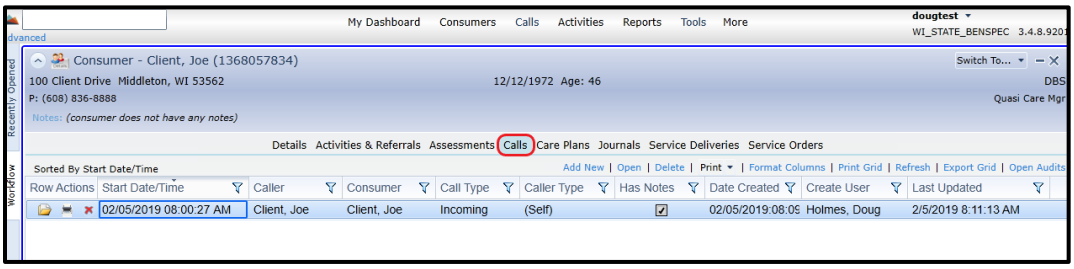
c. Consumer Record—Assessments

Click on the *Assessments Tab* within the *Consumer Record* to access this screen, which provides a list of *SHIP Assessments* completed for the selected *Consumer*.



d. Consumer Record—Calls

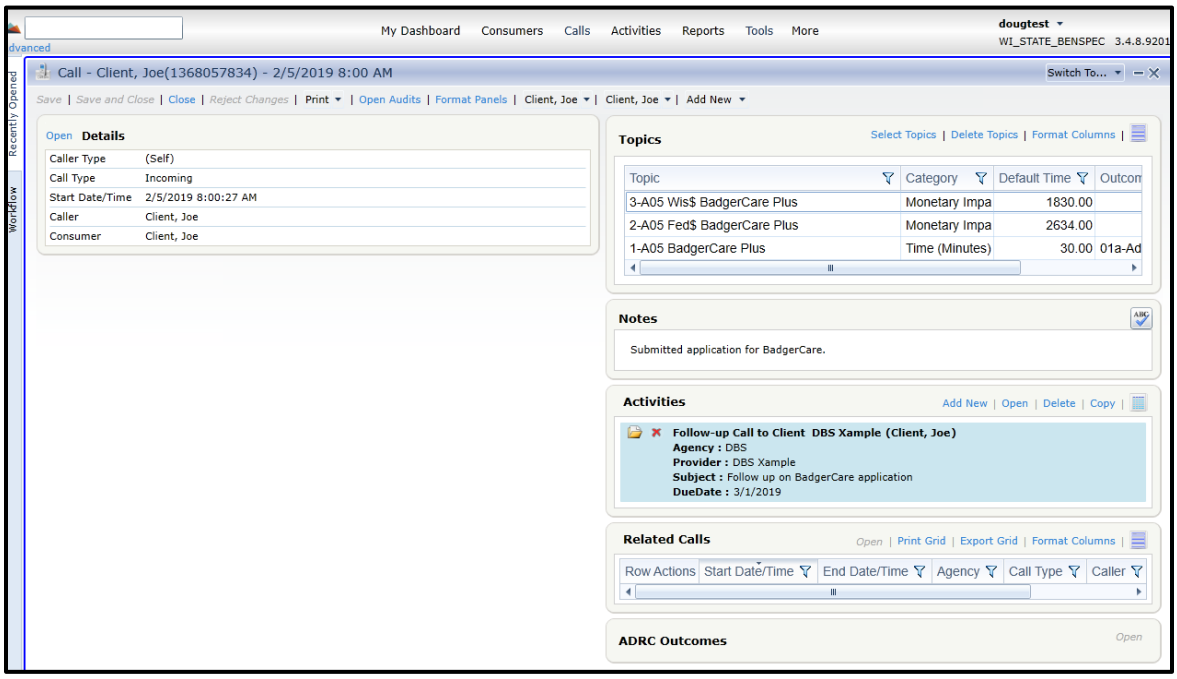
Click on the *Calls Tab* within the *Consumer Record* to access this screen, which provides a list of completed *Call Records* associated with the selected *Consumer*.



Note: The previous three screens contain no panels, but function as *List Screens*.

2. Call Record Screen

This is the default screen that opens when you select an individual *Call Record*. It provides detailed information about a specific *Call* (contact) with a *Consumer*.



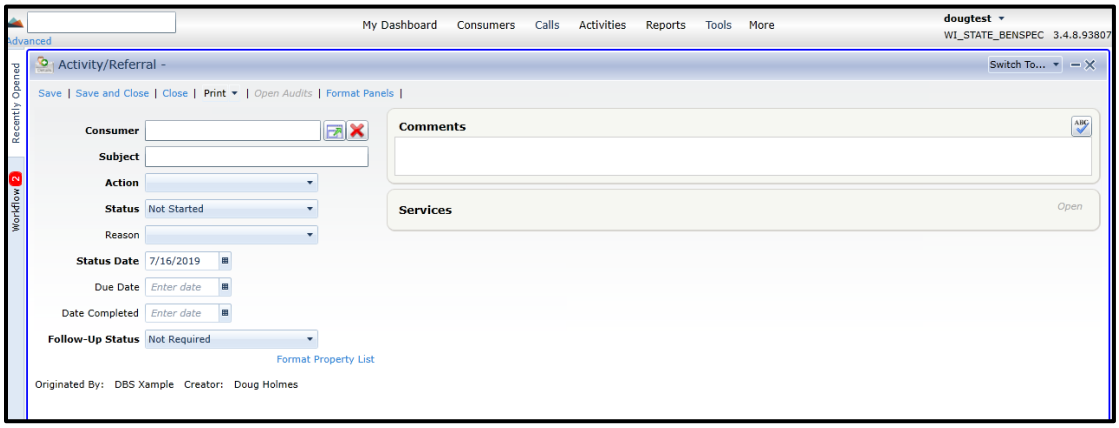
Note: The layout is similar to the *Consumer Record—Details Screen* in that it contains a details section on the left side of the screen and various panels on the right side. The *Topics Panel* in particular is one of the most important panels that you'll use in the management of your client contacts. It contains specific information on:

- The nature and purpose of your client contact.
- The length of time you spent serving your client.
- Any monetary impact of the services you provide.
- The status of your *Case* (open or closed) based on recorded *Outcomes*.

More information about the content and formatting of the *Topics Panel* will appear later in this guide. More information about the application and use of this panel in managing your client relationships will be discussed in the *WellSky/SAMS Data Entry and Case Tracking Guide*.

3. Activity Record Screen

This screen provides detailed information about a specific follow up *Activity* ("to-do") item for a *Consumer*.



Note: Only two panels appear in this screen, and only the *Comments Panel* is useful.

4. Record Screen Command Bars

a. Consumer Record – Details, Call Record, and Activity Record Screen Commands

In each of these screens is a *Command Bar* allowing you to perform the following described actions:

- **Save:** This option saves any changes made to the record.
- **Save and Close:** This feature saves changes and closes the *Record Screen*.
- **Close:** This option closes the *Record Screen*. If changes were made but not saved, you will be asked if you would like to save or discard changes.
- **Reject Changes:** This option discards changes you made to a record since you last saved it.
- **Print:** This option allows you to print the entire record.
- **Open Audits:** This option allows you to view a history of changes to the *Record*.
- **Format Panels:** This option allows you to change the order in which the panels on the right side of the *Consumer Details Screen* appear. More information on formatting panels can be found in the section *Formatting the Panel Display Order in a Record Screen* below.
- **Status Wizard:** This option will not be used by benefit specialists.
- **Copy Client ID:** This option allows you to copy the **Client ID** for the *Consumer Record* you're working in. It's unlikely that you'll use this option.

- **Add New:** This option is a dropdown menu allowing you to add a new panel from a list of options.

HOT TIP

> If a panel is missing from your display, you may need to "activate" the panel by clicking on **Add New** in the *Call* or *Consumer Record Command Bar*, and selecting the desired panel to add to the record.

b. Consumer Record – Activities & Referrals, Consumer Record – Assessments, Consumer Record – Calls, and all Panels Commands

In each of these screens is a *Command Bar* allowing you to perform the following described actions:

- **Add New:** Select this option to add a new *Consumer, Call, or Activity Record* (record types correspond with each respective screen type).
- **Open:** This command will open the record you've selected from the list.
- **Delete:** This command will delete the record you've selected from the list.
- **Print:** This command allows you to print one or more selected records from the list.
- **Format Columns:** This option allows you to select the data fields which are displayed in (or hidden from) the *Data Field Columns* and to customize the order in which they are displayed.
- **Print Grid:** Select this option to print the entire *Consumer* list.
- **Refresh:** Select this option to refresh the *Consumer* list. This menu option is helpful if you've updated a *Consumer Record* while the *Consumer List Screen* was opened.
- **Export Grid:** Use this option to save your list as a CSV, Excel, Text, or HTML file.
- **Open Audits:** This option allows you to view a history of changes to the *Record*.

Note: Command options may vary slightly within each individual Panel.

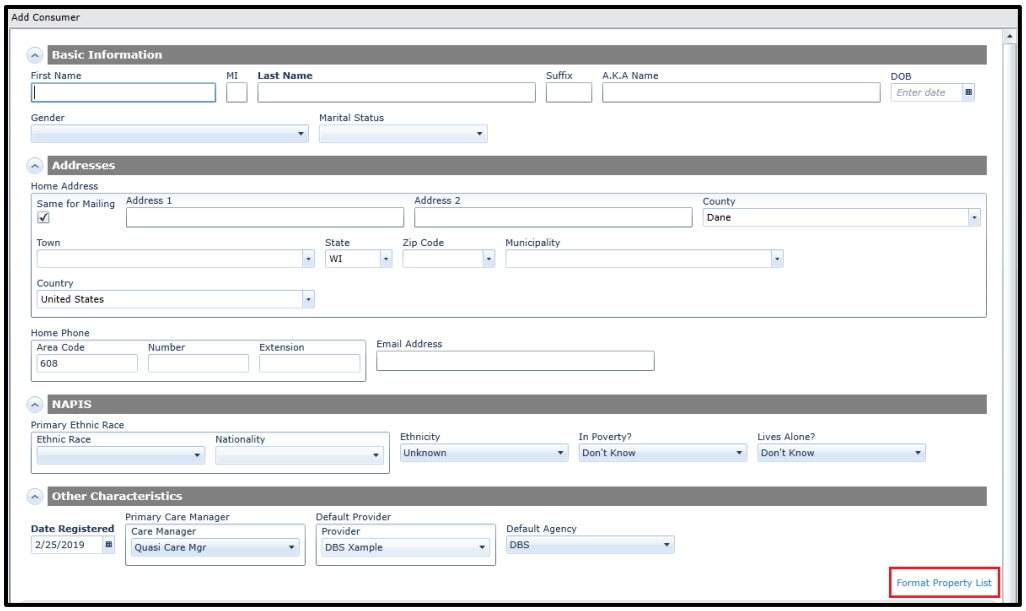
B. Formatting the Display in Record Screens

Note: For screenshots of recommended configurations of all applicable *Record Screens* and panels, see *Suggested Record Screen Formats* below.

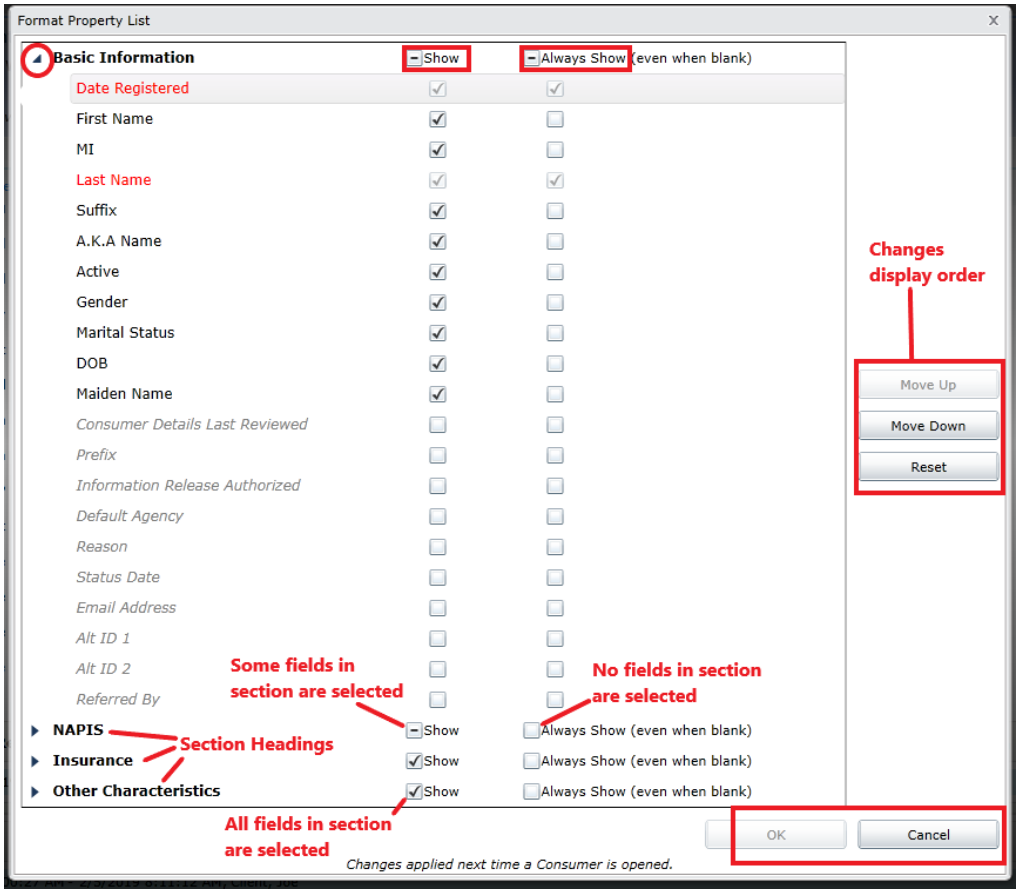
1. Formatting Individual Records using Format Property List Command

a. Add Consumer Record Screen (for adding a new Consumer Record)

1. From the *Consumer List Screen Command Bar*, click on **Add New**.
2. In the lower right corner of the *Add Consumer Screen* (shown below), click on **Format Property List.**



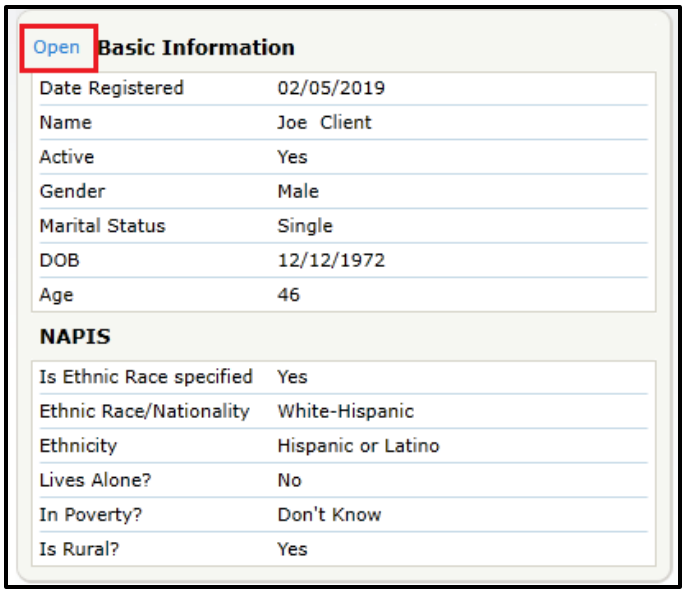
3. A pop-up window (shown below) will appear, allowing you to select or de-select which fields are displayed and their order of display based on your preferences.



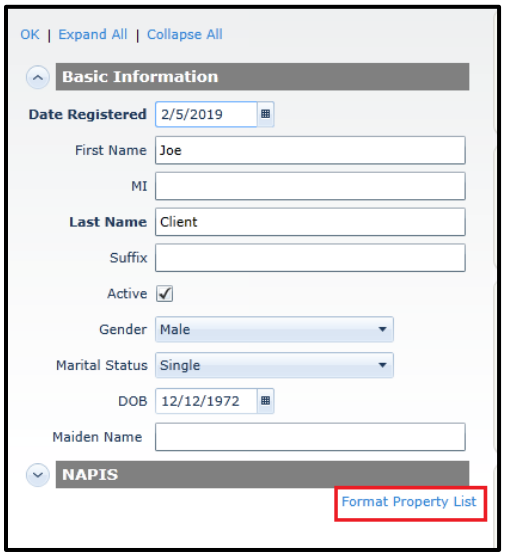
4. Click on the **arrow** to the left of the demographic category to show or hide the individual data fields eligible for modification. (See circled example next to *Basic Information* in the screenshot above.)
5. To modify which fields are displayed in the *Consumer Details Record Screen*, **check the box** in the **Show** column (the field will display in the record if it contains data) and/or the **Always Show** column (the field will display in the record whether it contains data or not) to display the field. **Uncheck the box** to remove the field from display.
   Note: Hidden or unchecked fields will appear lighter. Fields that are required to be displayed will be in red.
6. To modify the order in which fields are displayed in the *Consumer Details Record Screen*, select (click on) the field you wish to move up or down in the display. Click on **Move Up** or **Move Down,** based on your preference. You will see the field move up or down each time you click.
7. When you've completed making your format changes, click **OK**.
8. Your changes will now be visible in the *Data Entry Screen*.
9. Additional **notes about this section**:
   - Entire sections can be selected for display or hiding by clicking on the box next to **Show** and **Always Show** located at the top of each section.
     - If all fields in a section are checked, a check mark will appear in the **Show** or **Always Show** checkbox next to the section heading.
     - If some, but not all, fields are checked, a minus sign will appear in the **Show** or **Always Show** checkbox next to the section heading.
     - If no fields are checked, the **Show** or **Always Show** checkbox next to the section heading will be blank.
   - Clicking on the **Cancel** button will discard any changes since your last saved modification.
   - Clicking on the **Reset** button will restore the display selections to the original database default settings, **not** your previously saved settings.

b. Consumer Record—Details Screen (for an existing Consumer Record)

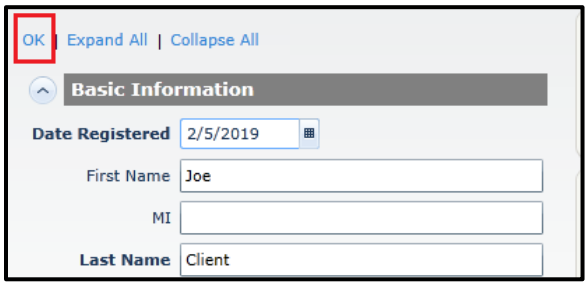
1. On the left side of the screen, next to *Basic Information,* click **Open**.



2. Scroll to the bottom of the information section and click on **Format Property List**.

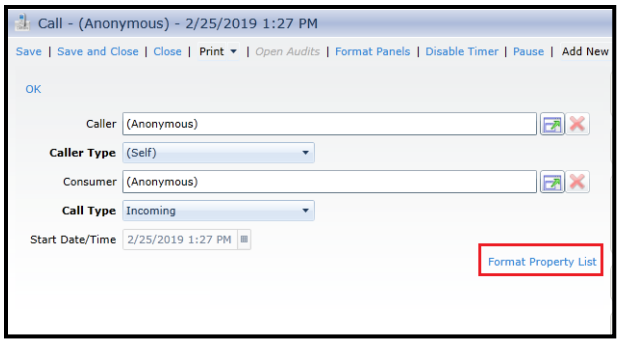


3. Select the fields to be displayed and the order of their display using the same steps as in the *Add New Consumer Record* section above.
4. Click **OK**.

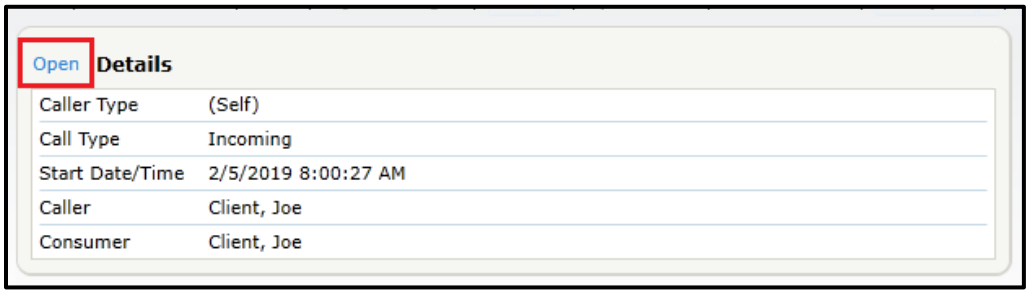


c. Call Record Screen

1. In the *Main Navigation Bar*, click on **Calls** to open the *Calls List Screen.*
2. On the *Calls List Screen Command Bar*, click on **Add New**.
3. In the *Caller* and *Consumer* information section located on the left portion of the screen, go to the bottom and click on **Format Property List**.

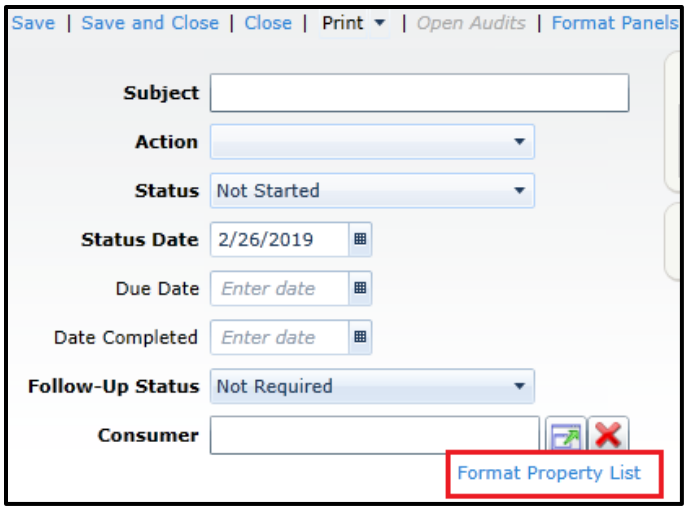


4. The remaining steps will be the same as in the *Add New Consumer Record* section above.
   Note: You can also format the property list using an existing *Call Record*, by clicking **Open** next to *Details*, then following the same instructions from step 3 in this section. Any formatting changes to an individual record will affect **all similar records** in your database.



d. Activity Record Screen

1. In the *Main Navigation Bar*, click on **Activities** to open the *Activities List Screen.*
2. On the *Activities List Screen Command Bar*, click on **Add New**.
3. Go to the bottom of the information section and click on **Format Property List**.



4. The remaining steps will be the same as in the *Add New Consumer Record* section above.
   Note: you can also format the property list using an existing *Activity Record.* Any formatting changes to an individual record will affect all similar records in your database.

2. Formatting Consumer Record Screens using Format Columns Command

For each the following screens:

- *Consumer Record—Activities & Referrals*
- *Consumer Record—Assessments*
- *Consumer Record—Calls*

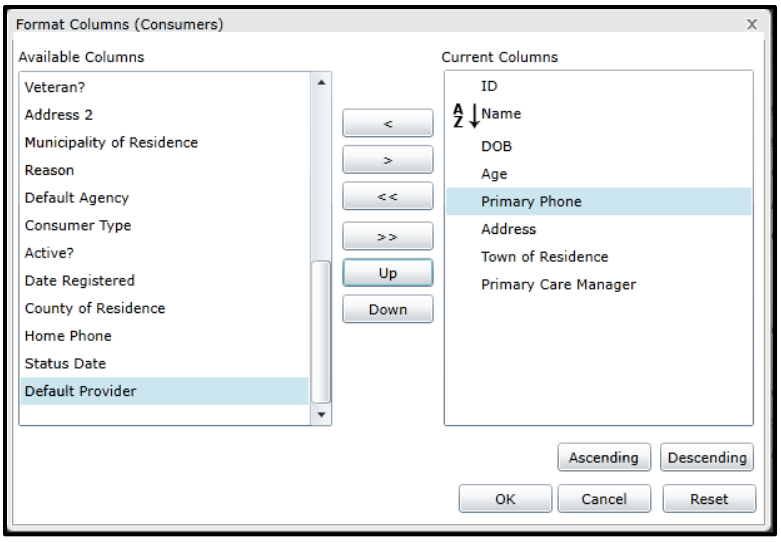
Formatting columns in the *Record List Screens* works similarly as described in the section, *Formatting the List Screens,* above. You can customize:

- The columns that are displayed or hidden.
- The order in which the columns are displayed.
- The width of the columns.

To display or hide individual *Data Fields*:

a. Click on **Format Columns** in the *List Screen Command Bar.*

b. A pop-up window will appear, similar to the screenshot example below. Fields located on the left side of the pop-up window under *Available Columns* are hidden fields and will not display on the *List Screen*. Fields located on the right side under *Current Columns* are displayed on the *List Screen*. The center section with various arrows, up, and down buttons allows you to customize your *List Screen* column display.



Note: Clicking on **Reset** will reset your configuration to the system default settings, not your previous configuration.

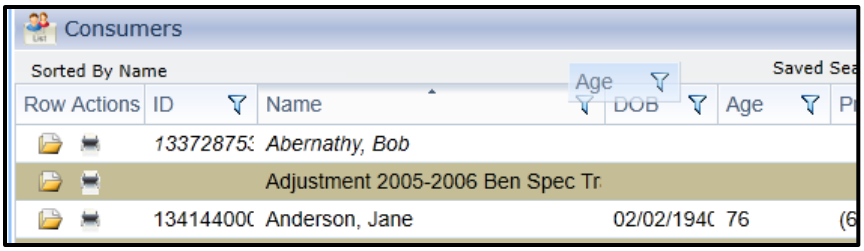
- To add a single *Data Field* to your *Data Column* display:
  1. Click on a D*ata Field* from the left side of the screen (under *Available Columns*).
  2. Click on the **single right arrow button (>),** located in the middle of the screen.
  3. Make sure the *Data Field* you selected has changed columns.
  4. Click on **OK.**
- To remove a single *Data Field* from your *Data Column* display:
  1. Click on a *Data Field* from the right side of the screen (under *Current Columns*).
  2. Click on the **single left arrow button (<),** located in the middle of the screen.
  3. Make sure the *Data Field* you selected has changed columns.
  4. Click on **OK.**
- To add all *Data Fields* to your *Data Column* display:
  1. Click on the **double right arrow button (>>),** located in the middle of the screen.
  2. Make sure the fields have changed columns.
  3. Click on **OK.**
- To remove all *Data Fields* from your *Data Column* display:
  1. Click on the **double left arrow button (<<),** located in the middle of the screen.
  2. Make sure the fields have changed columns.
  3. Click on **OK.**

3. Changing the Display Order of Data Fields

The order in which your *Data Fields* display in the *Data Field Columns* can be customized in two ways:

- Use the pop up window shown in the *Formatting Consumer Record Screens using Format Columns command* section above:
  a. In the *Current Columns* section on the right side of the pop-up window, click on the field you would like to move.
  b. In the middle section, click on the **Up** or **Down** button to move the selected field.

- Drag and drop the fields within the *List Screen.*



a. Click and hold on a selected *Data Field* (do not release your mouse click).
b. Drag the selected field to an area in between the columns where you would like to place the field (you will see the selected cell moving as you drag it).
c. Release your mouse click, and the field should now be repositioned.

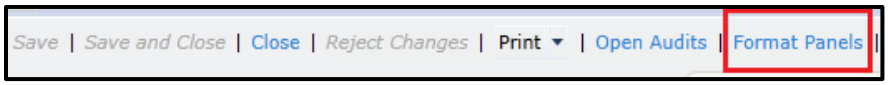
4. Formatting the Panels Display using the Format Panels Command

a. Formatting the Panel Display Order in a Record Screen

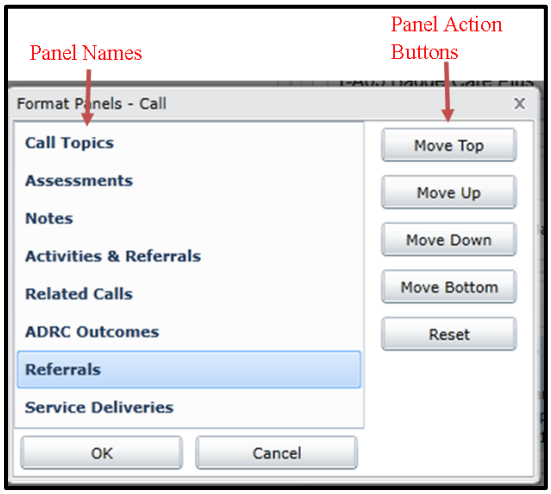
The following process describes how to arrange the order of the individual panels within a *Record Screen*.

Note: The process is the same in all *Record Screens*, but you'll need to format each record type (*Consumer*, *Call*, *Activities*). Once you have formatted your panel display order in a *Consumer Record*, the change will affect all of your *Consumer Records*. After formatting your panel display order in a *Call Record*, all of your *Call Records* will be affected by the change. The same is true for *Activity Records*.

1. Open an individual record.
2. In the *Command Bar*, click on **Format Panels**.



3. The following pop-up window will appear:



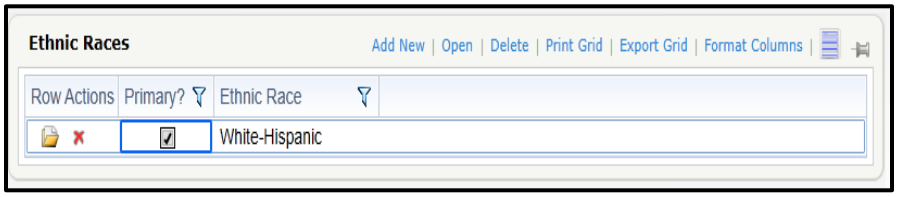
4. On the left side of the pop-up window, click on the name of the panel you want to move.
5. On the right side of the pop-up window, click on the **Panel Action Button** that corresponds to the direction you want to move the panel. You will see the panel change positions each time you click the **Panel Action Button**. Keep clicking on the **Panel Action Button** until the panel display is in your order of preference.
6. When your panels are displayed in your order of preference, click **OK**.

b. Formatting Individual Panels

- **Summary and Detail Panel Views**
  Panels may be viewed in *Summary View* or *Detail View*. To change the view of each individual panel, click on the **Grid Icon** located in the panel's *Command Bar*.

  Summary View:

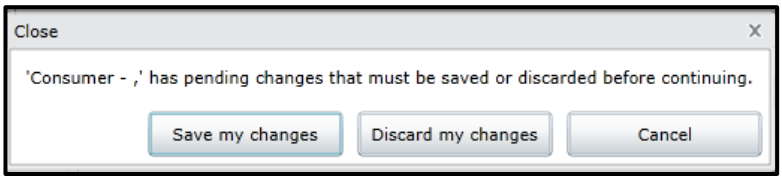
  Details View:



- **Panel Data Columns (when displayed in *Details View*)**
  When in *Details View* in applicable *Panels*, all *Panels* will display the same as *List Screens*. Formatting columns in the panels works exactly the same as described in section III.B.5. "*Formatting the Consumer Record List Screen Columns using Format Columns Command*" above.
- **Notes Panel and Directions to Home Panel**
  Narrative text can be entered into both of these panels. A spellcheck tool is included with these panels (the icon is located in the upper right of panels).
- **Recent Activities & Referrals, Recent Assessments, and Recent Calls Panels**
  These panels are located at the bottom of the *Consumer Record Details Screen* and will display any time the customer has had activity in those areas. They cannot be moved via the **Format Panels** command; however, from the *Details View* within the *Panel*, columns can be formatted the same as with any *List Screen*.

HOT TIP

When making formatting changes to your any of your *Record Screens*, you'll receive this warning when closing the record:



If you've only changed the record format, select **Discard my changes**. Doing so will not affect the formatting changes you've just made. This warning refers to changing data within the record.

5. Suggested Record Screen Formats

Although you can customize the look of your *Record Screens* based on your personal preferences, following are recommended formats to help get you started and help to eliminate fields that might not be necessary or are irrelevant to your job function.

a. Property Lists

See *Formatting Individual Records using Format Property List Command* for step-by-step instructions.

Note: The screenshots below have been cropped to display only the fields relevant to the formatting recommendation.

1. Add New Consumer Screen

Format Property List

Basic Information	Show	Always Show
Date Registered	✓	✓
First Name	✓	☐
MI	✓	☐
Last Name	✓	✓
Suffix	✓	☐
A.K.A Name	✓	☐
DOB	✓	☐
Social Security #	✓	☐
Active	✓	☐
Marital Status	✓	☐
Default Agency	✓	☐
Home Phone	✓	☐
Email Address	✓	☐

Addresses	Show	Always Show
Home Address	✓	☐
Mailing Address	✓	☐

NAPIS	Show	Always Show
Primary Ethnic Race	✓	☐
Ethnicity	✓	☐
Gender Identity	✓	☐
Household Status	✓	☐
RUCA Is Rural?	✓	☐
In Poverty?	✓	☐
Disability - BLV	✓	☐
Disability - DD	✓	☐
Disability - DHH	✓	☐
Disability - MI	✓	☐
Disability - PD	✓	☐

See notes about disability fields below

Care Providers	Show	Always Show
Primary Care Manager	✓	☐
Default Provider	✓	☐

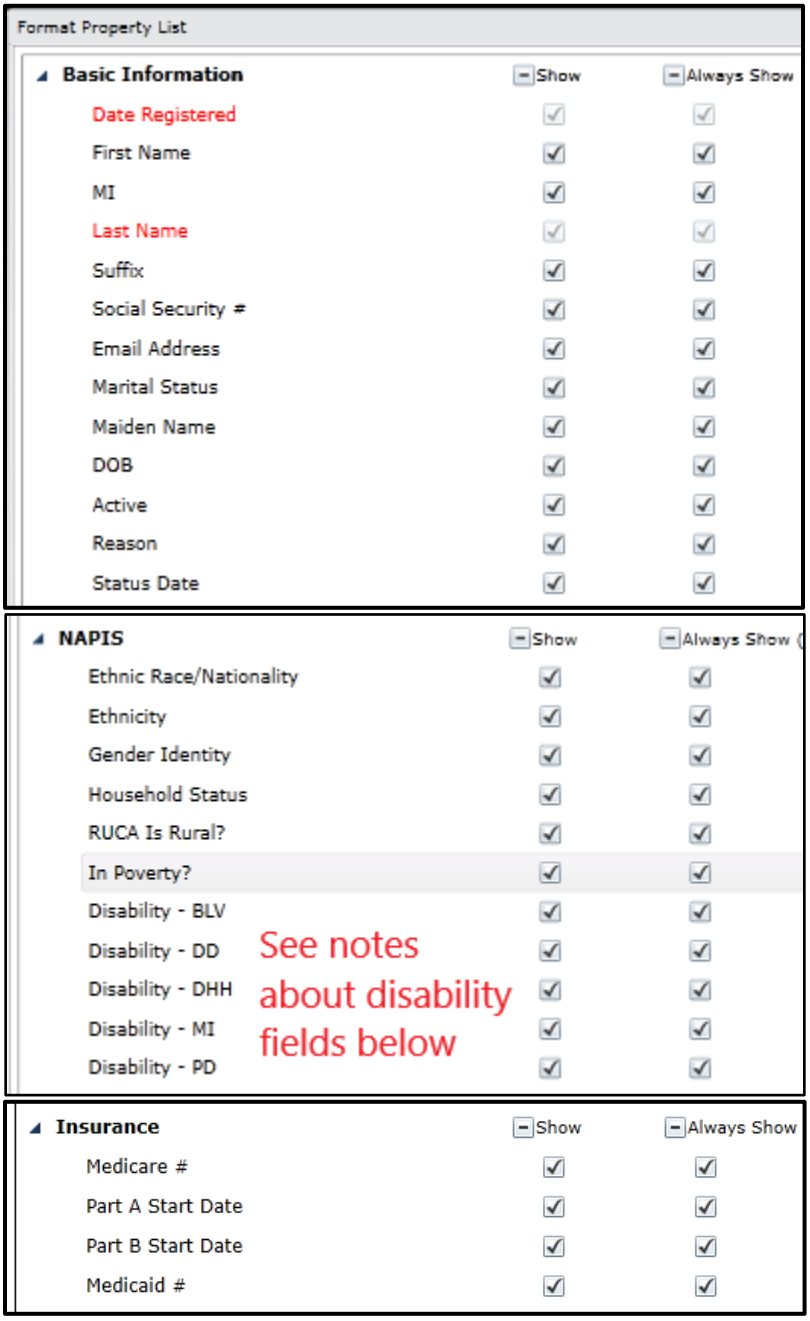
Insurance	Show	Always Show
Medicare #	✓	☐
Part A Start Date	✓	☐
Part B Start Date	✓	☐
Medicaid #	✓	☐

Disability fields notes:

- Disability fields are not required for EBSs.
- Field names in the Format Property List screen are different from the corresponding field names in the Add Consumer screen. Below is a table showing the corresponding field names in each screen:

Format Property List screen	**Add Consumer screen**
Disability – BLV	Visual Disability
Disability – DD	Intel-Develop Dis
Disability - DHH	Deaf-Hearing Dis
Disability - MI	MH-Sub Use Disorder
Disability - PD	Physical Disability

2. Existing Consumer Record—Details



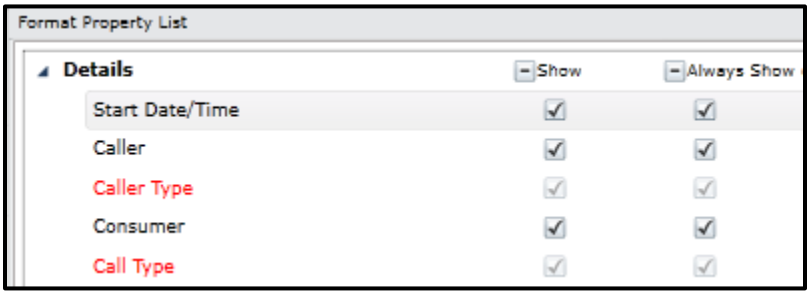
Disability fields notes:

- Disability fields are not required for EBSs.
- Field names in the Format Property List screen are different from the corresponding field names in the Consumer Record - Details screen. Below is a table showing the corresponding field names in each screen:

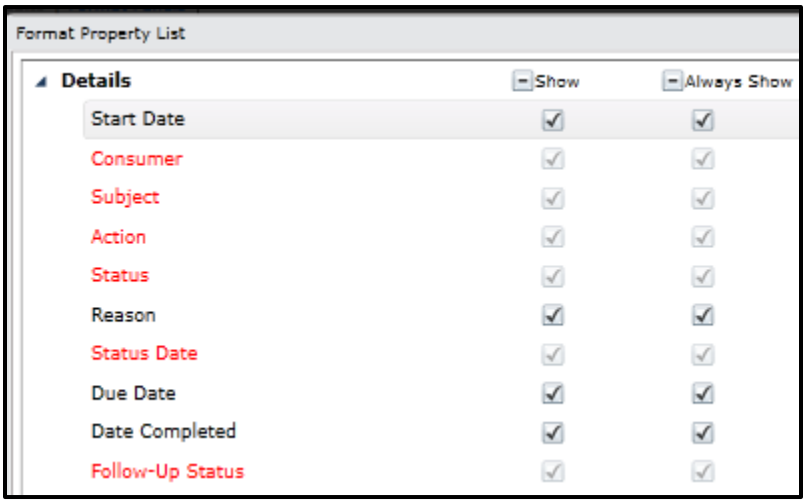
Format Property List screen	Consumer Record – Details screen
Disability – BLV	Visual Disability

Disability – DD	Intel-Develop Dis
Disability - DHH	Deaf-Hearing Dis
Disability - MI	MH-Sub Use Disorder
Disability - PD	Physical Disability

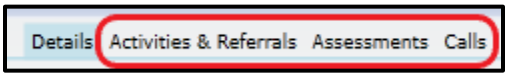
3. Call Record



4. Activities Record

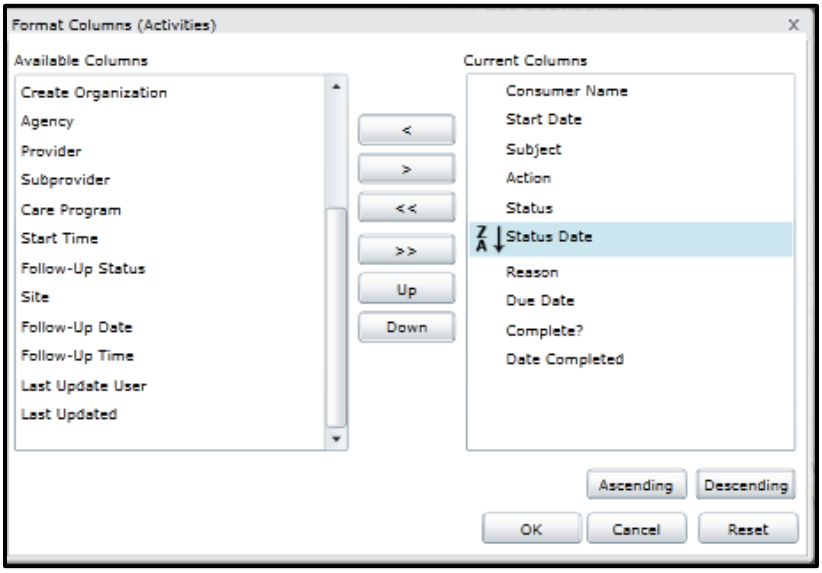


b. Consumer Record List Screens (tabs in a Consumer Record)

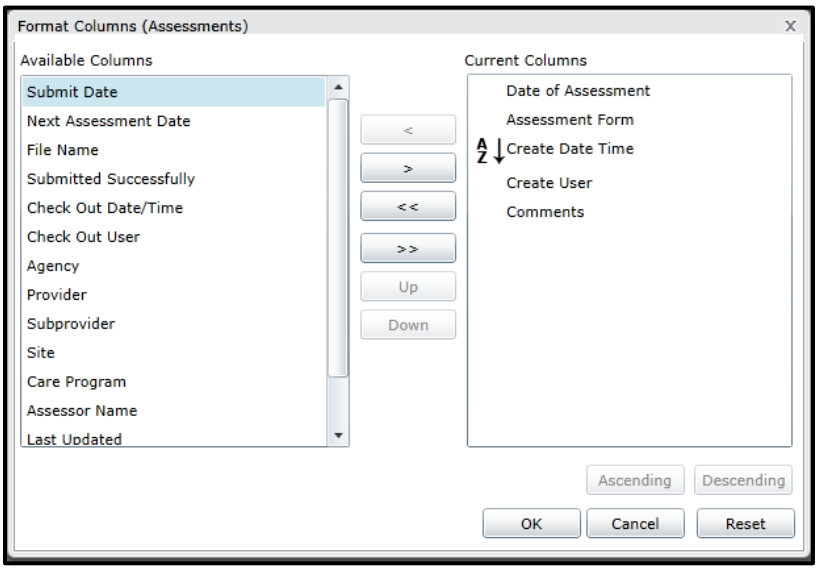


See *Formatting Consumer Record Screens using Format Columns Command* for step-by-step instructions.

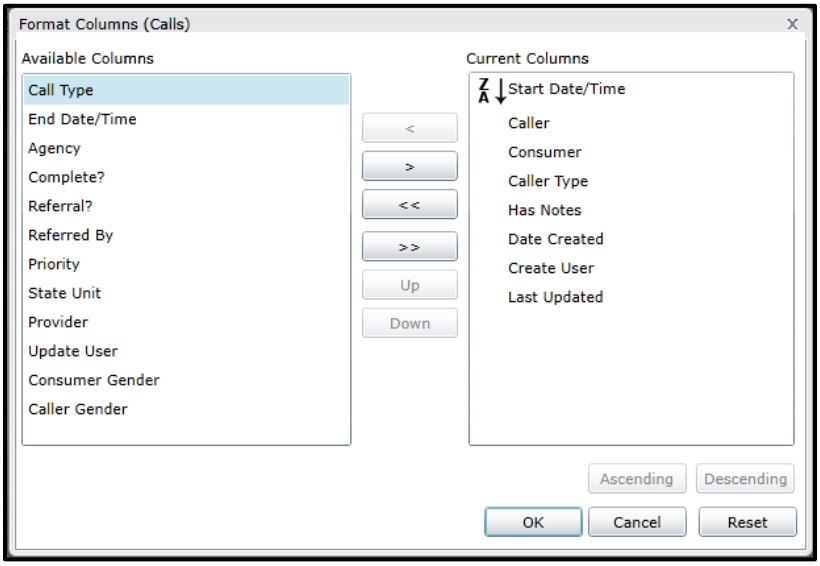
1. Activities & Referrals



2. Assessments



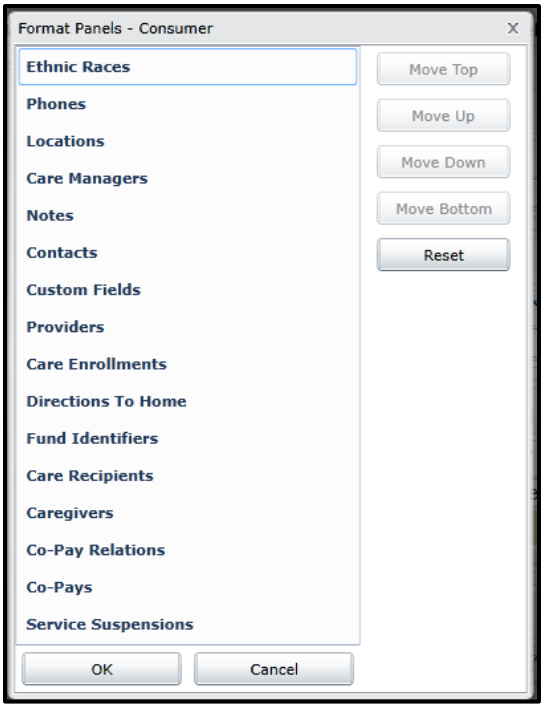
3. Calls



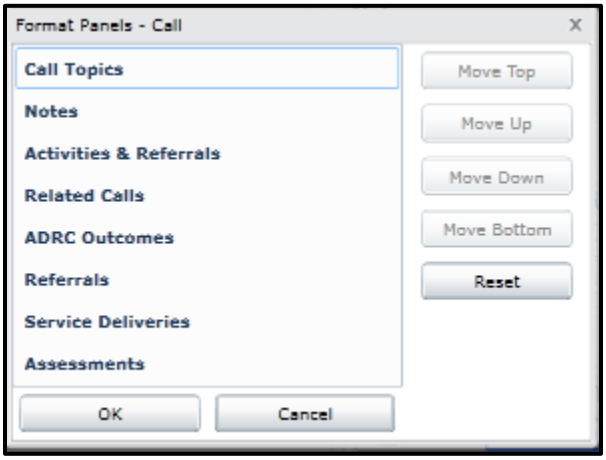
c. Record Screen Panels Display Order

See *Formatting the Panel Display Order in a Record Screen* for step-by-step instructions.

1. Consumer Record—Details Screen



2. Call Record



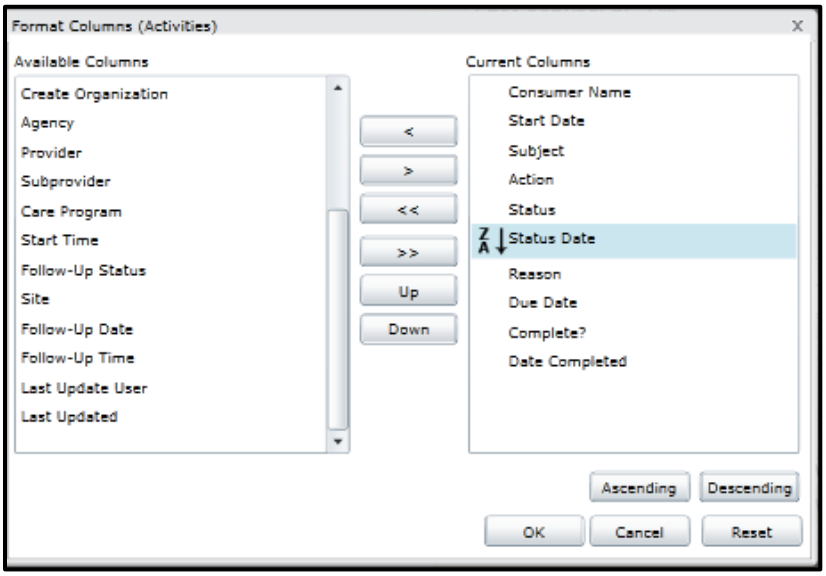
3. Activities Record

There are only two panels in this screen. Use the existing default setting.

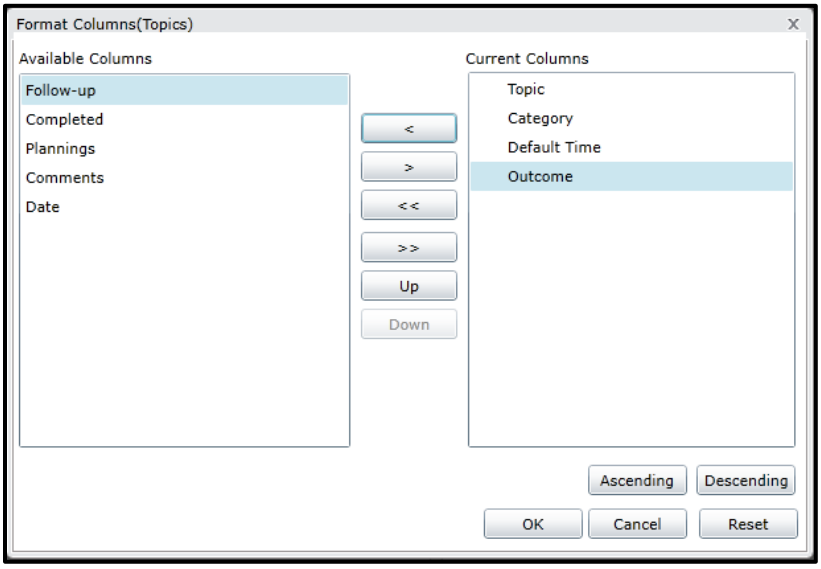
d. Individual Panel Columns

See *Formatting Individual Panels* for step-by-step instructions

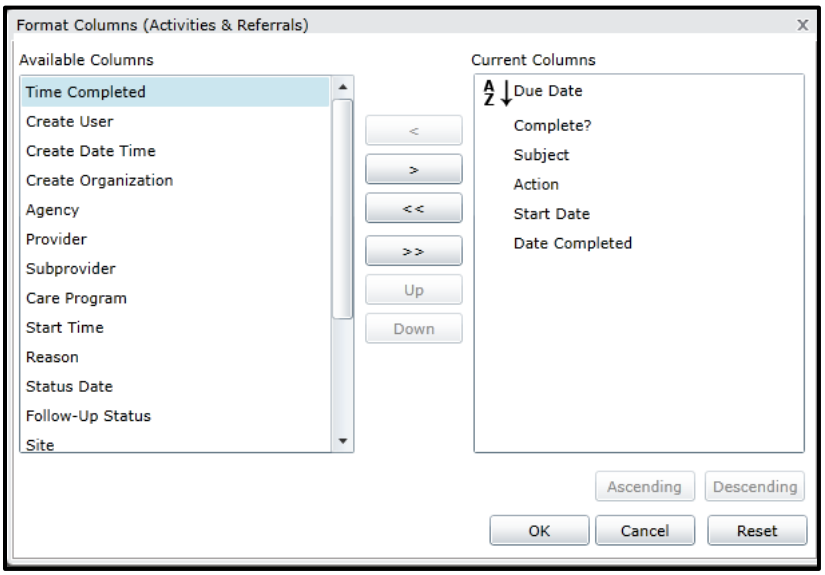
1. Activities Panel (in Call Record Screen)



2. Topics Panel (in Call Record Screen)



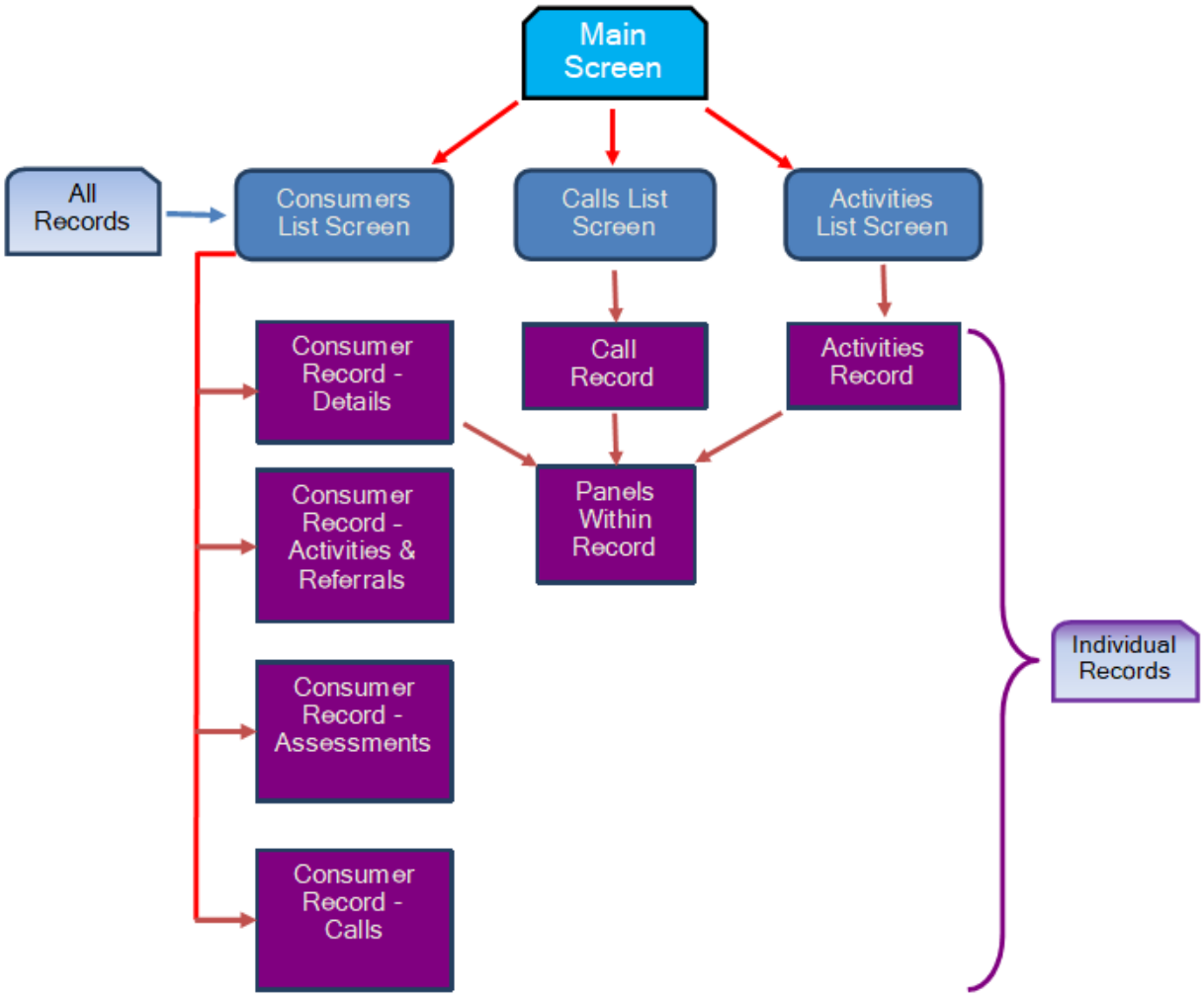
3. Recent Activities & Referrals (in Consumer Record—Details Screen)



Appendix A: Key Terminology and Unique Features of WellSky/SAMS

- **Authorized Representative:** A person authorized to act on behalf of a client. An authorized representative may have legal authority to act on the client's behalf, such as, a parent of a minor child, legally appointed guardian, or person with an active or durable power of attorney. An authorized representative can also be a person the client has consented to receive or provide information on their behalf, such as, a supportive decision maker, friend, or family member.
- **Caller:** The individual with whom a contact has been made via phone or in person.
- **Care Manager:** The benefit specialist.
- **Case:** *Case*s reflect the details of how you are assisting or have assisted your clients. They are created by adding a *Call Record* for a *Consumer* and selecting a *Topic* for which there may or may not be a successful resolution. More information about opening, tracking, and closing *Case*s can be found in the WellSky/*SAMS Data Entry and Case Tracking Guide*.
- **Command Bar:** Contains links to action items related to the screen in which you're currently working. It is located on all *List Screens*, *Record Screens*, and within most panels.
- **Consumer:** The term WellSky/SAMS uses to refer to your clients and their authorized representatives.
- **List Screens:** *Data Fields* organized by columns, creating a list of records. *List Screens* accessed from the *Main Navigation Bar* display all records by category (*Consumers*, *Calls*, etc.) for your agency. *List Screens* accessed within a record (*Consumer Record* or within panels) show only records by category related to the individual record you're working in.
- **Main Screen:** Screen that opens upon login. Includes a *Search Bar, Main Navigation Bar, Sidebar Panel, System Controls Dropdown Menu,* and *Work Area.*
- **Navigation Bars**
  - **Main Navigation Bar:** Contains links to the main areas of WellSky/SAMS. Links will open lists of **all** *Consumers*, **all** *Calls* and *Activities* associated with your *Consumers*, **all** *Reports* available for your use, **all** *Saved Searches*, and SHIP tools.
  - **Consumer Navigation Bar:** Located on a *Consumer Record Screen*. It contains links to navigate between the four *Consumer Record Screens* (*Details, Activities & Referrals, Assessments,* and *Calls*).
- **Notes:** Can be related to an individual *Consumer* as part of their overall record **or** can be related to an individual action (such as to a specific C*all* or contact with a *Consumer*).
- **Outcomes:** Reflect the successful resolution of a *Time Topic*.
- **Panel:** Data organized by category (*Topics, Notes, Activities, Related Calls*, etc.) within a record.
- **Provider:** Office or agency providing services to clients.
- **Record Screen:** A screen showing an individual record (*Consumer*, *Call*, etc.)
- **Topics:**
  - **Time Topics:** Amount of time spent on a client service or benefit discussed.
  - **Monetary Impact Topics:** Related to a time topic and reflect the monetary value of the benefit received by the client.

Appendix B: Hierarchy of Screens within WellSky/SAMS



Appendix C: WellSky/SAMS Shortcut Keys

Global Hot Keys

The following global keyboard shortcut function can be executed at all times, regardless of which screen is currently open within the application.

- **F1:** Opens the application help menu.

List Screens (Data Grids)

The following keyboard shortcuts and mouse clicks can be used within all *List Screens* in the application.

- **Up Arrow:** Navigates to the top of the grid, one record at a time.
- **Down Arrow:** Navigates to the bottom of the grid, one record at a time.
- **Left Arrow/Right Arrow:** Moves the cell focus to the right or left for each highlighted row. The column cell is faintly highlighted and this navigation helps position the column for the type-ahead feature.
- **Page Up:** Navigates to the top of the grid, one page at a time.
- **Page Down:** Navigates to the bottom of the grid, one page at a time.
- **Enter:** Opens the highlighted record.
- **Delete:** Deletes the highlighted record(s).
- **Left Click:** Selects the specified record.
- **Ctrl-Left Click:** Allows the user to select multiple random records on grids that support multiple-selection.
- **Shift-Left Click:** Allows the user to select multiple consecutive records on grids that support multiple-selection.
- **Shift-Up Arrow/Shift-Down Arrow:** Allows the user to select multiple consecutive records, one at a time, on grids that support multiple-selection.
- **Right Click:** Displays the right-click menu.
- **Home:** Repositions the grid all the way to the left when a grid is currently scrolled to the right (and there are more columns defined than what is currently shown in the display).
- **End:** Repositions the grid all the way to the right when a grid is currently scrolled to the left (and there are more columns defined than what is currently shown in the display).
- **Ctrl-Page Up:** Highlights the very first record on the current grid page.
- **Ctrl-Page Down:** Highlights the very last record on the current grid page.
- **Ctrl-Up Arrow:** Highlights the very first record on the current grid page.
- **Ctrl-Down Arrow:** Highlights the very last record on the current grid page.
- **Ctrl-Home:** Highlights the very first record on the current grid page and scrolls the grid all the way to the left.
- **Ctrl-End:** Highlights the very last record on the current grid page and scrolls the grid all the way to the right.

Editing Records

The following keyboard shortcuts and mouse clicks can be used when editing specific records in the application, such as a *Consumer Service Delivery Record*, and more.

General

- **Tab:** Moves the cursor to the next field (top to bottom or left to right, depending on screen layout).
- **Shift-Tab:** Moves the cursor to the previous field (bottom to top or right to left, depending on screen layout).
- **Enter:** Commits the selected entry when using single-select lists.
- **Ctrl-A:** Activates the **Add New** dropdown menu. Once opened, the **Tab** key navigates, **Enter** selects an item, and **Cancel** closes the menu.

Text Fields

- **Ctrl-C:** Standard "copy" functionality. Copies the selection to the clipboard.
- **Ctrl-V:** Standard "paste" functionality. Pastes the contents of the clipboard into the current location.
- **Ctrl-X:** Standard "cut" functionality. Cuts the selection to the clipboard.
- **Ctrl-Z:** Standard "undo" functionality. Rejects all text edits in the field since the control last received focus.
- **Delete:** Standard "delete" functionality. Deletes the selection without copying it to the clipboard.

Date Fields: Using the Pop-Up Calendar

- **Space Bar:** Opens the calendar when the cursor is in a date field.
- **Esc:** Closes the calendar without committing a date.
- **Left Arrow/Right Arrow:** Moves the cursor from day to day on the calendar.
- **Left Click:** Selects a specified day on the calendar.

Date Fields: Editing a Date Inline

- **Left Arrow/Right Arrow:** Moves the cursor within the data field.
- **Number Keys:** Enters the actual date. It is not required that the user enter the **slash (/)** characters.
- **"Today":** Sets the date to today's date when the user types the word "today.
- **"Tomorrow":** Sets the date to tomorrow's date when the user types the word "tomorrow" (or a partial spelling of the word, such as "tom").
- **"Yesterday":** Sets the date to yesterday's date when the user types the word "yesterday" (or a partial spelling of the word, such as "y").
- **Tab:** Selects and commits the specified date (when using type-ahead) and will move to the next field.

Single-Select Fields—Radio Buttons

- **Left Click:** Selects the desired entry.
- **First Letter Recognition/Type-Ahead:** Selects the entry that begins with the letter entered. In cases where multiple entries exist with the same first letter, the user can repeatedly press the first letter and the application will navigate to each item that begins with that first letter.

Single-Select Fields—Dropdown Lists

- **Left Click:** Selects the desired entry.
- **First Letter Recognition/Type-Ahead:** Selects the entry that begins with the letters entered.
- **Left Arrow/Right Arrow:** Cycles through the available choices.
- **Backspace:** Removes an entry from a single-select field.

Multi-Select Fields—Checkboxes

- **Left Click:** Selects or de-selects the desired entry.
- **Spacebar**: Checks or un-checks the appropriate box when the entry is highlighted.
- **First Letter Recognition/Type-Ahead:** Highlights the entry that begins with the letters entered. In cases where multiple entries exist with the same first letter, the user can repeatedly press the first letter and the application will navigate to each item that begins with that first letter.

Assessments

The following keyboard shortcuts and mouse clicks can be used when recording data within a *Consumer Assessment*.

General

- **Tab:** Moves the cursor to the next field.
- **Shift-Tab:** Moves the cursor to the previous field.
- **Down Arrow:** Moves the cursor to the next field.
- **Up Arrow:** Moves the cursor to the previous field.
- **Enter:** Moves the cursor to the next field. **Note:** This is not enabled by default. This will only be enabled if the user has chosen to use the **Enter** key to navigate within an assessment in their *Assessment Options* settings.
- **Left Click:** Selects the desired entry.

Single-Select Fields—Radio Buttons

- **Left Click:** Selects the desired entry.
- **First Letter Recognition/Type-Ahead:** Selects the entry that begins with the letters entered. In cases where multiple entries exist with the same first letter, the user can repeatedly press the first letter and the application will navigate to each item that begins with that first letter. If assessment responses have labels, the application will select items with labels that begin with the letters selected.

Multi-Select Fields—Checkboxes

- **Left Click:** Selects or de-selects the desired entry.
- **Spacebar**: Checks or un-checks the appropriate box when the entry is highlighted.
- **Left Arrow/Right Arrow:** Navigates within the assessment responses. The assessment response cell is clearly highlighted allowing the user to press the spacebar in order to select the specific checkbox.
- **First Letter Recognition/Type-Ahead:** Highlights the entry that begins with the letters entered. In cases where multiple entries exist with the same first letter, the user can

repeatedly press the first letter and the application will navigate to each item that begins with that first letter.

Appendix D: Navigation and Formatting Exercises

Detailed instructions for completing each exercise can be found by clicking on the corresponding links below.

☐ Search for a *Consumer* from the *Main Screen Search Box* (see *section I.A.2.*).

☐ Open the list of all *Consumers* (see *section I.A.3.*).

☐ Open the list of all *Calls* (see *section I.A.3.*).

☐ Open the list of all *Activities* scheduled (see *section I.A.3.*).☐

☐ Filter the list of all *Consumers* by specifying a city (*see section II.A.4.*).

☐ Sort the list of all *Consumers* alphabetically, descending (Z before A) by name (*see section II.A.3.*).

☐ Open a *Consumer Record* (*see section II.A.2.*).

☐ Print a *Consumer Record* (*see section III.A.4.*).

☐ Close a *Consumer Record* (*see section III.A.4.*).

☐ In an existing *Consumer Record*, change a panel to S*ummary View* and *Detail View* (*see section III.B.4.*).

☐ View all *Activities and Referrals* for an individual *Consumer* (*see section III.A.1.*).

☐ View the list of *Calls* for a *Consumer* (*see section III.A.1.*).

Format your *Main Screen* features (*see section I.B.*).

☐ Unpin the *Sidebar*.

☐ Configure the *Main Navigation Bar*.

☐ Configure default settings in *My Settings*.

Format columns in your main *List Screens* (*see section II.B.*).

☐ *Consumers List Screen*

☐ *Calls List Screen*

☐ *Activities List Screen*

Format *Property Lists* in your *Record Screens* (*see section III.B.1.*).

☐ ***Add New*** *Consumer Record*

☐ ***Existing*** *Consumer Record—Details*

☐ *Call Record Screen*

☐ *Activity Record Screen*

Format columns in your *Consumer Record List Screens* (*see* *section III.B.2.*).

☐ *Consumer Record—Activities and Referrals*

☐ *Consumer Record—Assessments*

☐ *Consumer Record—Calls*

Format the display order of *Panels* in your *Record Screens* (*see* *section III.B.4.*).

☐ *Consumer Record—Details*

☐ *Call Record Screen*

Format columns in your *Panels* (*see* *section III.B.4.*).

☐ *Call Record—Activities Panel*

☐ *Call Record—Topics Panel*

☐ *Consumer Record—Details—Activities & Referrals Panel*