



**WISCONSIN DEPARTMENT**  
*of* **HEALTH SERVICES**

**Division of Public Health – Bureau of Aging and Disability Resources**

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# **WellSky/SAMS**

*Browser Configuration*

*and*

*Login Guide*

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## **Benefit Specialists**

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## **Introduction**

The WellSky/SAMS Aging & Disability database application is used to track activities conducted by Wisconsin's Aging and Disability Resource Center (ADRC) specialists, Tribal Aging and Disability Resource specialists (tribal ADRS), disability benefit specialists (DBS), elder benefit specialists (EBS), and dementia care specialists (DCS); as well as Older Americans Act (OAA) services recorded by providers throughout Wisconsin.

## **Account Access**

Access to WellSky/SAMS is restricted to account holders authorized by the Department of Health Services. Though the system is used statewide, **users may only access data entered by staff within their local agency as restricted by program policies.**

## A. Computer and Browser Configuration

Please refer to the document titled “[WellSky Aging & Disability / SAMS – System Configuration Requirements](#)”. This document was emailed to you by [DHSBADRTech](#) at the time you were granted access to WellSky/SAMS. The instructions in the document provide all the information necessary for your information technology support staff to properly configure your browser. After your computer and browser have been properly configured, you may proceed to the next section “Logging Into WellSky/SAMS.”

## B. Logging Into WellSky/SAMS

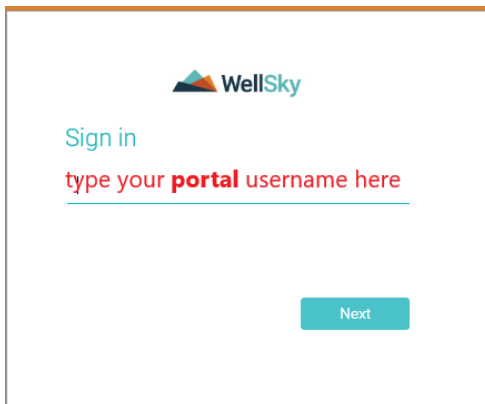
There are two screens that you’re required to log into in order to access the database content.

- The portal (the first login screen)
- The database application (the second login screen)

You should have been provided a separate username and password for each of these login screens. **Be sure to use the correct username and password for each login screen.**

### 1. Initial Login to WellSky’s Web Portal

- Go to: <https://portal.wellsky.com>. This is the address on the bookmark that should have been created for you by your information technology support staff.
- Login to the portal using your **portal** username.



- Next, enter your portal password.



- d. Immediately after entering the username and password you were provided, you will be prompted to change your password. Enter and confirm your new password as instructed and click **Sign In**.
- Password specifications:
    - ✓ Must be at least 10 characters in length.
    - ✓ Cannot contain any significant portion of your name or user ID  
**Example:** If your user ID is 'mary1234', then your password could not be 'marigold#9876'.
    - ✓ Cannot use a password that you previously used.
    - ✓ Cannot contain multiple repeating characters (aaaaaa, 8888888, etc.)
    - ✓ Must include *at least* three out of the four following character types:
      - lower-case letters (a, b, c, ... x, y, z)
      - upper-case letters (A, B, C, ... X, Y, Z)
      - numbers (0, 1, 2, .... 9)
      - symbols (#, &, %, :, ?, etc.)
- e. Next, a pop-up window will appear in which you will need to select and answer three personalized security questions. Click on the dropdown arrow to the right of each question field to see the list of available questions.

**Set Your Security Information**

Security Question 1:  ▾

Security Answer 1:

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Security Question 2:  ▾

Security Answer 2:

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Security Question 3:  ▾

Security Answer 3:

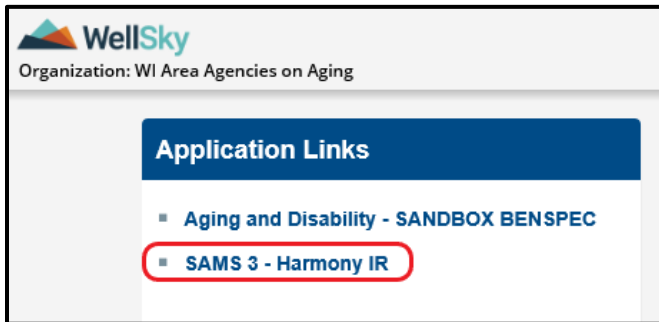
- f. Select, from the dropdown list, questions you will remember, and which will be difficult for someone else to look up or guess.
- g. Enter your answers in the space provided.

Note that if you enter an incorrect password three times when logging into the portal (during your initial login or at any time in the future), WellSky/SAMS will lock your account for 30 minutes. Make sure your “caps lock” key is not turned on and that you’re using the correct case for each character in your password. After 30 minutes, you may attempt to log into the portal again. If you cannot remember your password, use the *Reset Password* option found on the portal password entry screen.



## 2. Initial WellSky/SAMS Application Login

- a. After your initial portal configuration is complete, you'll reach the main portal web page. From here, click on the appropriate WellSky/SAMS link. **Note:** Some users might see the link displayed below, others might see the link displayed as *SAMS 3* (without “Harmony IR”).



Note that if this is your first time accessing WellSky/SAMS, it may take a few minutes to initialize. WellSky/SAMS downloads a large amount of reference data which allow it to operate more efficiently. Your very first WellSky/SAMS start-up may require up to 5 minutes, so be patient. Subsequent loads should only take a few seconds. When WellSky/SAMS finishes downloading its reference data, it will display the WellSky/SAMS application login window on a second tab of your web browser.



Welcome to  
WellSky Aging & Disability

Use your Aging & Disability (SAMS) credentials to sign in.

Username \_\_\_\_\_

Password \_\_\_\_\_

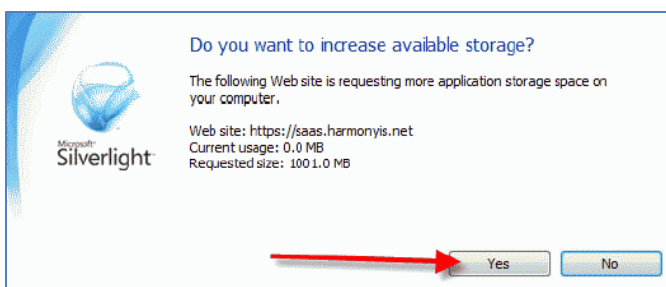
Database

SAMS 3 - Harmony IR

SAMS 3 - Harmony IR - BENSPEC

**SIGN IN**

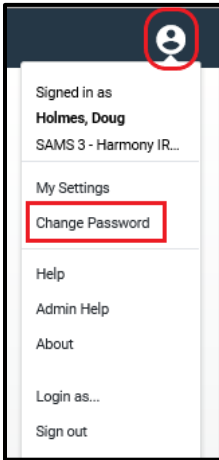
- b. Input the WellSky/SAMS credentials (username and password) you have been given for the WellSky/SAMS application.
- c. Anyone with benefit specialist database access may see multiple database options from which to select. If applicable, click on the dropdown arrow in the *Database* field to view options.
  - Benefit specialists should select the *SAMS 3 – Harmony IR - BENSPEC* database.
  - All others should select the *SAMS 3 – Harmony IR* database. (Note that, for some users, the database name may appear as simply *SAMS 3*.)
- d. After entering your username, password, and (if applicable) selecting the appropriate database, click **SIGN IN**.
- e. At some point during your first WellSky/SAMS login you might be asked to increase the application storage space for Silverlight and WellSky/SAMS. When you see the following prompts, allow the increase of application storage as the additional drive space is needed for storing the previously-mentioned reference data.



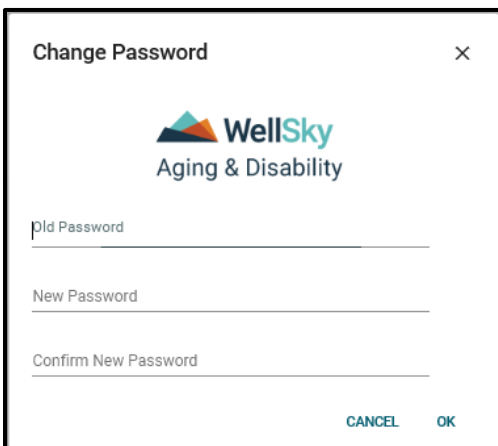
### 3. Change Your Password in WellSky/SAMS Application

Changing your password for the WellSky/SAMS application is a process separate from changing your password on the portal. (Changing your password on one login screen will not automatically change your password on the other login screen.)

- a. In the database application (second login), click on the circular icon found in the upper right corner of your screen. A menu of options will display.



- b. From the menu display, select **Change Password**:
- c. Complete the pop-up box fields as instructed.



- d. Congratulations! You're now ready to use WellSky/SAMS. If you have followed all other steps in this document and WellSky/SAMS still does not work properly, please email [DHSBADRTech@dhs.wisconsin.gov](mailto:DHSBADRTech@dhs.wisconsin.gov).

**Note that the "Forgot Password" option is not available for the WellSky/SAMS database application. If you've forgotten your password for this login screen, contact [DHSBADRTech](mailto:DHSBADRTech). Specify that you've forgotten your password for the database application (not the portal).**

## C. Additional Technical Information

**Adobe Acrobat Reader:** This software (or any PDF reader) is required for previewing WellSky/SAMS reports generated using the PDF preview option. (This software is probably already installed on your computer.)

**Screen Resolution:** The minimum viable screen resolution for using WellSky/SAMS is 1024x768. The optimal screen resolution is 1280 x 1024.

**Readability:** WellSky/SAMS currently provides limited capability for increasing font size and enhancing readability. If you are having difficulty viewing certain screens within WellSky/SAMS, it is recommended that you use the built-in zoom feature within Edge.