Frequently asked questions during the new user interface webinar

WellSky held a webinar on July 21 to demonstrate the new user interface now available in the latest release of WellSky Community Services. We received many questions during the webinar which are answered here.

Getting started

When is this update available? Will it happen automatically? What do we need to do?
The new release is available now - Community Services 5.14.17. This is a "major" release, which means the upgrade must be scheduled by the System Administrator via a Case in the Support Hub. You can update your Training Site first, if desired. Please specify in your Case which sites to update (Training and/or Live sites).

Is there a deadline to implement the new release?
All systems that need to be compliant with the HMIS Data Standards will need to upgrade to version 5.15.00 when it is available on October 1, 2023. WellSky recommends upgrading to version 5.14.18 as soon as it is available so that Provider Admin updates can be configured prior to October 1, 2023. Each of these versions includes the UI changes that are available in version 5.14.17.

The interface

Can we change the header colors to make them stand out better?
The WellSky Design Language Standard is consistent across each solution/product, so the colors are standardized across each screen.

Where can we leave feedback about the new interface?
We welcome your feedback. Please submit your feedback via Cases in the Support Hub. If you do not have access to the Support Hub, please coordinate with your System Administrator.

Are there plans to make a "dark" mode as well?
We do not have any current plans to create a "dark mode." However, we have completed preliminary research into the use of high contrast modes and similar browser plugins that effectively create a "Dark Mode" experience. For example, the Chrome High Contrast plugin might be preferred by some users.

Can we get screenshots of the new UI to present to our leadership and users, or for data standards changes?
We recommend updating your training site as soon as possible to take screen shots that are meaningful to your community. If you do not have a training site, please request access to a demo site.

The Sandbox site, available in early September, can be used for screenshots of Data Standards changes.

Is this new interface also optimized for mobile devices?
No; this update was not intended to make the screens optimized for mobile devices. Those kinds of changes will be implemented over time as we target specific screens and features for user experience updates in the future.

Did you request feedback from actual end-users during this redesign?
Yes, we received feedback from users prior to finalizing this update and we will continue to seek input on future updates to the user experience and interface.

Will the Demo site show step by step instructions for training staff?
The UI update does not affect any workflow changes to the system.

Training sites and demo sites

Is it possible to push the new release to our training site before we push it to the live (production) site?
Yes, just specify in your Case that you only want the Training Site upgraded.

Can you clarify what you mean by "demo site?" We do not have a training site. Can we try this new release before going live?
Some implementations have what are known as "training sites," which allow you to test new releases before implementing them on your live site where users enter their data. If you do not have a "training site," you can request access to a generic demo site in order to preview the new UI. Please submit a Case in the Support Hub for this access.

Can you clarify the Sandbox site? Is this separate from our regular HMIS instance?
The "sandbox" site will be a generic demo site used to preview the HMIS Data Standards updates that will be included in version 5.15.00. We expect to have this site available in early September.

Will the training site have an alternate color scheme like it currently does?
The training site will continue to have an orange band.

URLs

Is the site address the same? Will the URL be updated from sp5, servicept, or ServicePoint to CS specific terms? If the old URL is bookmarked, will it still work? Will we have to update current URLs that are saved, linked, or bookmarked?

All URLs will be replaced with new URLs in the coming weeks. Users will be redirected from the current URL to the new URL, so bookmarks can continue to be used. At some point in the future, the old URLs will be completely decommissioned. We will provide more details before that is set to occur.

Will the new URL also affect our test site address?
Yes, the new URL will affect training sites.

What is the format of the new URL?
The new URL will follow this pattern: https://wscs.wellsky.com/[TENANTNAME].

Features

NOTE: This update does not change any of the functionality in WellSky Community Services.

Is SkanPoint now "Scans?"
Yes, that's the new name as of version 5.14.17. However, we are considering updating to "Service Scan." If we decide to make this change, we will announce it to all clients and it will be part of a release version.

Do these updates pave the way for more functionality updates to the data entry process later?
They do! Additional updates are being designed now. Stay tuned for more information prior to the release of additional updates.

Are "workflows" or step-by-step guides still on the features coming soon list?
Yes, workflows are still being considered for a future release..

Data entry / Data management

NOTE: This update does not change how data is managed or entered in WellSky Community Services.

Administration / User management

NOTE: This update does not change any administration functions in WellSky Community Services.

Are there major changes that we should highlight to end users?
The left side navigation is the area most impacted during this UI uplift.

Training & documentation

Where can I find the release notes?
In the Support Hub.

Where can we find a summary of all the changes?
The changes are listed in this presentation.

What type of support/technical assistance does WellSky offer to end users?
Please contact your system administrator for training options.

Can we have the help desk link?
https://portals.force.com/supporthub/login

Reporting

What is the terminology used for Business Objects licenses? The current system still calls them ART.
Advanced Reporting Tool is still the name of license.

Mobile app

When will the Community Services mobile app be available?
It's available now! Contact your Client Success Manager or Customer Success Rep via a Case in the Support Hub to schedule a demonstration with more information.

Is there an additional cost to use the mobile app?
Yes, contact your Client Success Manager for more information on pricing.

How do individuals access the mobile app? Do they need a login created for them? What items would they have access to?
Contact your Client Success Manager, who can demonstrate the app and how it functions.

Can clients delete or edit the information on their HMIS client using the mobile app?
Clients cannot delete data using the mobile app. WellSky can enable Assessments chosen by your System Admin that appear as blank forms to the mobile app users. Data can be entered and updated by the clients on those forms. System Admins will determine how data entered via the mobile app will or will not be shared within Community Services.

Will clients using the mobile app have access to their data or just their ID barcode?
Clients have access to some of their data via the Mobile App, including Case Managers, Households, Project Enrollments, Services, and Goals.

How do participants access their id card on the mobile app?
This is available on the My Account page in the mobile app.

Can you scan community cards from the mobile app using the mobile device's camera?
The mobile app is designed to be used by clients, not by case managers or data entry staff. The Client ID barcode is viewable within the mobile app and can be scanned by a case manager or data entry staff to record a service or to check-in to a shelter or other residential facility.

Is there documentation on the mobile app?
There is a webinar about the app. Documentation is also available by contacting your Client Success Manager or Customer Success Rep via a Case in the Support Hub.

APIs

What's an "API?"
"API" stands for "Application Programming Interface", which enables 3rd-party software developers the ability to access and update Community Services data.

How do we set up APIs?
The API is purchased separately. Contact your Client Success Manager or Customer Success Rep via a Case in the Support Hub.

Is the cost of the API a one-time fee or per pull?
There is a one-time set-up fee and an annual licensing and maintenance fee. Pricing is not based on usage. Contact your Client Success Manager or Customer Success Rep via a Case in the Support Hub for more detailed pricing information.

Can providers use the API to write to the system? Will the "Create and Update" support for Client API be expanded to include entries and case managers, households, and needs in the future?
The Client API currently supports the ability to create and update those data types.

Where is the API read/write documentation?
Contact your Client Success Manager or Customer Success Rep via a Case in the Support Hub for more detailed information.

Roadmap

When would you expect to roll out UI changes based on the feedback you are hearing?
Any additional updates will occur after the HUD updates.

With the 5.15.00 upgrade, is there an expansion of conditional logic?
The 5.15 update will have the new HUD Updates.

Will 2-factor authentication use a cell phone or email?
It will allow authentication via email, texting, and authenticator apps.