

FAMILY RESOURCE NAVIGATOR (FRN) PROGRAM WellSky Handbook

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Questions? Contact the WellSky Helpline at yfswellskysupport@multco.us
<http://multco.us/programs/wellsky-community-services-and-grouptrail-help>

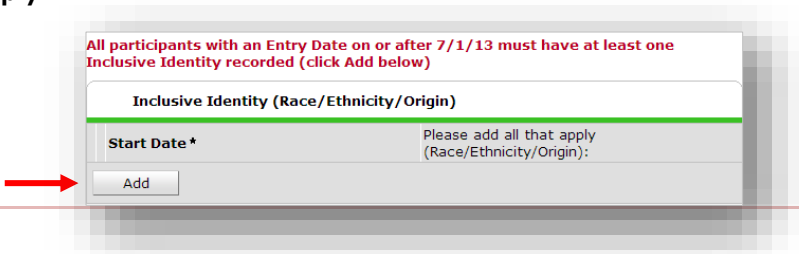
FRN WellSky Handbook - Revision History

- **Revised February 2022:** Added screenshots to illustrate every data entry step.
- **Revised May 2022:** Added Case Manager to workflow
- **Revised August 2025:** Significant program model changes

REQUIRED DATA ELEMENTS

- Each client who participates in services must first have a program entry.

1. ENTRY

Provider	Will default to the correct provider
Entry Type	Always choose 'Basic'
Entry Date	Date of program entry *Defaults to date of data entry - Remember to change*
Section I	Complete for Parent
Date of Birth	
Gender	
Inclusive Identity	<p>Click 'Add' to enter a client's self-identified race/ethnicity. Add as many as apply.</p>  <p>The screenshot shows a form titled 'Inclusive Identity (Race/Ethnicity/Origin)'. It has a 'Start Date *' field and a text area for 'Please add all that apply (Race/Ethnicity/Origin):'. Below the text area is an 'Add' button, which is highlighted by a red arrow.</p>
Primary Language	
Primary Language-Other	Only required if Primary Language is 'Other' - Do not enter a 2 nd language
Zip Code of Last Perm Addr.	Parent's current Zip Code
Resources Needed	Select any resources the parent needs
Zip Code of Last Perm Addr.	Parent's current Zip Code
Parental Release of Information?	Has the Parent signed a release of information?
Release Year	School year the release covers
Referring School	The school that referred the Parent to the FRN Program
School – Other (must specify)	If the school is not in Referring School, enter the name here

2. Exit

Exit Date	Date of program exit	*Defaults to date of data entry – Remember to change*
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Reason for Leaving

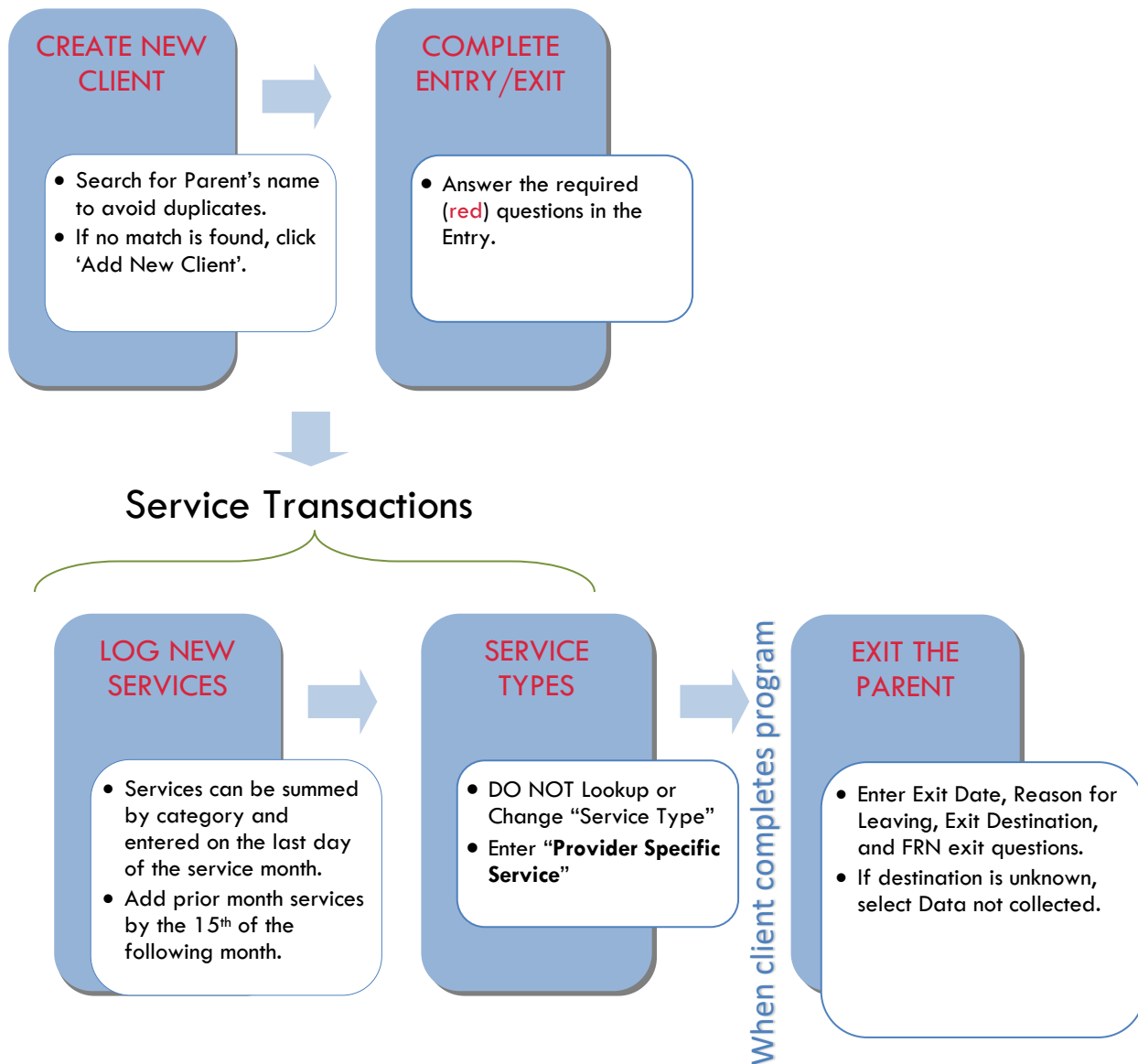
Destination	Parent's living situation at exit
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Exit Assessment

Was this program helpful to
you and your family?

I know how to access the
resources I need

Data Entry Workflow



Family Resource Navigator Program

Family Resource Navigators provide the following resource supports:

- Case Management
- Group Skill-Building and Workshops
- Language Supports
- Outreach and Referral
- Rent Assistance Referral – Bienestar CGF
- Rent Assistance Referral – Medicaid

All WellSky data for the previous month must be entered by the 15th of every month.
(Example: September data is due on October 15th)

For more information, see the Data Tracking FAQ in the FY26 SUN Family Resource Navigator Evaluation Plan.

ADDING A CLIENT

Click Clients in the dark blue menu on the left, and then search for the parent. If the parent is not in Wellsky, then **ADD** them to the system.

- If you are working with more than one person in the family, *you do not need to create clients for every member of the family.*

The screenshot shows the 'Client Search' interface. A red circle with the number 1 highlights the instruction 'Please Search the System before adding a New Client.' A red circle with the number 2 highlights the 'Search' button. A red circle with the number 3 highlights the client entry '1183822 MCtesteron, Testy' in the 'Client Results' table. A red dashed arrow points from the 'Add New Client With This Information' button to a text box that says 'If client is not in the system --- "Add new client with this Information"'. The 'Client Results' table has columns: ID, Name, Social Security Number, Date of Birth, Alias, Gender, Banned, and Household Count.

ID	Name	Social Security Number	Date of Birth	Alias	Gender	Banned	Household Count
1183822	MCtesteron, Testy		10/01/2015				0

ADDING AN ENTRY/EXIT

- After you select a client or create a new one, the next screen you'll see is the Client Information / Summary tab.
- In Entry/Exits, click Add Entry/Exit.

Client - (1427918) Mctesteron2, Testy

(1427918) Mctesteron2, Testy
Release of Information: **None**

Client Information

Summary

Added to the system 09/02/2025 01:41 PM

Name	Mctesteron2, Testy	Social Security
Date of Birth		U.S. Military Veteran?
Race and Ethnicity		
Gender		

Entry/Exits

Program	Type	Entry Date	Exit Date
No matches.			

Add Entry / Exit

Services

Start Date	End Date	Provider
No matches.		

Add Service **Add Multiple Services**

Exit

- In the Project Start Data window, change Type to Basic and Project Start Date to the Parent's FRN Entry Date, and then click Save & Continue.

Project Start Data - (1426615) McTester, Testy

Household Members

This Client is not a member of any Households.

Project Start Data - (1426615) McTester, Testy

Provider *	El Programa Hispano Catolico (EPHC): SUN-Clear Creek Middle - SP (5404)	Search My Provider Clear
Type *	Basic	
Project Start Date *	07 / 15 / 2025	9 : 39 : 54 AM

Save & Continue **Cancel**

- On the next screen, answer the Entry demographics questions, and then click Save & Exit.

Exit Assessment

DSCP_FRN_Entry (FY26)
Entry Date: 07/15/2025 09:39:54 AM

SECTION I.
Complete for Parent

Date of Birth
 / /

Select all that apply. To select multiple values, hold down the "ctrl" or "cmd" key and click on each value.

Gender

Woman (Girl, if child)
Man (Boy, if child)
Culturally Specific Identity (e.g., Two-Spirit)
Transgender
Non-Binary
Questioning
Different Identity
Client doesn't know
Client prefers not to answer
Data not collected

Clear All

Text field below is required when selecting "Different Identity"

If Different Identity, Please Specify

Inclusive Identity (Race/Ethnicity/Origin)

Start Date *

Please add all that apply (Race/Ethnicity/Origin):

Add

Primary Language

-Select-

If Primary Language is Other, then Specify:

Resources Needed

Start Date *

End Date

Resources Needed

Add

Parental Release of Information?

-Select-

Release Year

-Select-

Referring School

-Select-

School - Other (must specify)

Save

Save & Exit

Exit

ADDING SERVICE TRANSACTIONS

After you add the Entry, select the **Service Transactions** tab to the right of Client Information

Inside the **Service Transactions** tab, click “ADD SERVICE”.

(1183822) MCTesteron, Testy
Release of Information: **None**

Client Information **Service Transactions**

Service Transaction Dashboard

Add Need
 Add Service
 Add Multiple Services
 Add Referrals
 View Previous Service Transactions

View Shelter Stays
 View Entire Service History

On the Add Service screen, enter a Start Date and select one of the six **Provider Specific Services** listed on Page 5.

Client - (1183822) MCTesteron, Testy

(1183822) MCTesteron, Testy
Release of Information: **None**

Client Information **Service Transactions**

Add Service

▼ Household Members

This Client is not a member of any Households.

Service Provider **2** Elementary - SP

Creating User: Nayeli Perez Martinez

Start Date **3** / / : :

End Date / / : :

Service Type *****

Provider Specific Service **4**

Start date can be ANY date within the month the service was provided. An End Date is not needed. Leave blank.

Leave "Service Type" as is. The field will change automatically to "Basic Needs".

- To add more than one service at the same time, click the Service Transactions tab, and select Multiple Services.



The screenshot shows the 'Service Transaction Dashboard' under the 'Service Transactions' tab. It features a grid of seven buttons: 'Add Need', 'Add Service', 'Add Multiple Services' (circled in red), 'Add Referrals', 'View Previous Service Transactions', 'View Shelter Stays', and 'View Entire Service History'.

- To add more than one service at the same time, click the Service Transactions tab, and select Multiple Services. Enter the first and last dates of the month, enter the Provider Specific Service, and then enter the number of times the Parent received that service in Number of Units.
- If other services need to be entered for the Parent, click Add Another in the bottom right. When you're finished entering services, click Save & Exit.

The screenshot shows the 'Service List' form. The 'Number of Services' is set to 1. The 'Start Date' is 08/01/2025 and the 'End Date' is 08/30/2025. The 'Service Type' is 'Basic Needs (B)' and the 'Provider Specific Service' is 'Case Management'. The 'Number of Units' is 4. The 'Need Status' is 'Identified'. The 'Add Another' button is circled in red. Other buttons visible include 'Remove', 'Clear', 'Remove All', 'Clear All', 'Save & Exit', and 'Cancel'.

ADDING AN EXIT

- To exit a Parent when they've completed FRN services, go to Entry/Exits on the Summary screen, then click the pencil next to Exit Date.

Entry/Exits			
Program	Type	Project Start Date	Exit Date
El Programa Hispano Catolico (EPHC): SUN-Clear Creek Middle - SP	Basic	 07/15/2025	
Add Entry / Exit		Showing 1-1 of 1	

- In the Edit Exit Data window, enter the Exit Date, Reason for Leaving, and Destination. If you don't know the parent's living situation, enter Data not collected and click Save & Continue.

Edit Exit Data - (1426615) McTester, Testy

Edit Exit Data - (1426615) McTester, Testy

Exit Date * 08 / 19 / 2025
Reason for Leaving Completed program
If "Other", Specify
Destination * Data not collected (HUD)
If "Other", Specify
Notes

Save & Continue Cancel

- Answer the two questions on the Exit Assessment tab, and click Save & Exit.

Entry Assessment
Exit Assessment

Household Members
DSCP_FRN_Exit (FY26)
Exit Date: 08/19/2025 09:16:51 AM

(1426615) McTester, Testy
Age: Unknown
Veteran: Unknown

Was this program helpful to you and your family? Yes
I know how to access the resources I need. Yes

Save Save & Exit Exit