# FAMILY RESOURCE NAVIGATOR (FRN) PROGRAM

# WellSky Handbook

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Multnomah County

Questions? Contact the Wellsky Helpline at yfswellskysupport@multco.us
http://multco.us/progams/wellsky-community-services-and-grouptrail-help
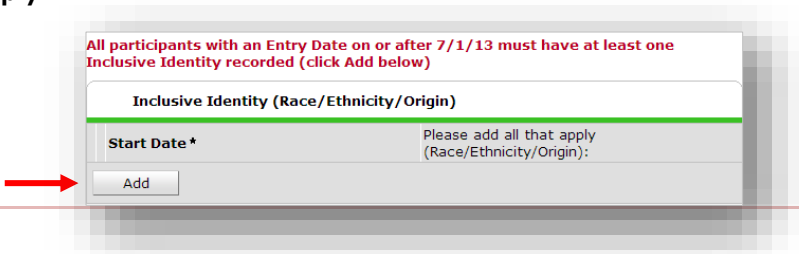
# FRN WellSky Handbook - Revision History

- **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 | **Click 'Add' to enter a client's self-identified race/ethnicity. Add as many as apply.**  |
| Primary Language | |
| Primary Language-Other | Only required if Primary Language is 'Other' - Do **not enter a 2nd 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\*** |
| Reason for Leaving | |
| Destination | Parent's living situation at exit |

### Exit Assessment

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

# Data Entry Workflow

**CREATE NEW CLIENT**

- Search for Parent's name to avoid duplicates.
- If no match is found, click 'Add New Client'.

**COMPLETE ENTRY/EXIT**

- Answer the required (red) questions in the Entry.

## Service Transactions

**LOG NEW SERVICES**

- Services can be summed by category and entered on the last day of the service month.
- Add prior month services by the 15th of the following month.

**SERVICE TYPES**

- DO NOT Lookup or Change "Service Type"
- Enter "**Provider Specific Service**"

*When client completes program*

**EXIT THE PARENT**

- Enter Exit Date, Reason for Leaving, Exit Destination, and FRN exit questions.
- If destination is unknown, select Data not collected.

# 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.*

## 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.



- 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.

- 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            ___/___/_____ 📅 ↻ 📅 G

*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

G

Clear All

*Text field below is required when selecting "Different Identity"*

If Different Identity, Please Specify            _____ G

🔍 **Inclusive Identity (Race/Ethnicity/Origin)**

| Start Date* | Please add all that apply (Race/Ethnicity/Origin): |
|---|---|
| Add | |

Primary Language            -Select-            ⌄ G

If Primary Language is Other, then Specify:            _____ G

🔍 **Resources Needed**

| Start Date* | End Date | Resources Needed |
|---|---|---|
| Add | | |

Parental Release of Information?            -Select- ⌄ G

Release Year            -Select- ⌄ G

Referring School            -Select-            ⌄ G

School - Other (must specify)            _____ G

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".



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

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



- 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.

## 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.



- 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.



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