



2023 WellSky Personal Care Training Summit Schedule

Schedule updated Tuesday, June 14, 2023*

Day One – Wednesday, June 21, 2023 (Times listed in Eastern Daylight Time)

Start Time	End Time	Session Title	Session Description
10:30 AM	10:40 AM	Welcome/Housekeeping	Welcome to the 2023 WellSky Personal Care Training Summit! This session reviews today's housekeeping items.
10:40 AM	11:10 AM	New Features	Overview of new features released in WellSky® Personal Care that you may have missed in the past several months.
11:10 AM	12:10 PM	Prospect to Client Intake Process	This session reviews the process of adding in a prospective client, converting them to a client, and adding all the details to the client profile.
12:10 PM	12:25 PM	Break	Let's take a short break.
12:25 PM	1:25 PM	Applicant and Caregiver Management	This session will include adding in an applicant caregiver, converting them to a caregiver, and adding all the details to the skills, background, and certifications.
1:25 PM	1:55 PM	Lunch	Let's take a short break for lunch.
1:55 PM	2:55 PM	Custom Forms	This session is a complete walkthrough demonstrating client and caregiver custom forms in WellSky® Personal Care. We will also cover tips and tricks to make custom forms utilization easier.
2:55 PM	3:45 PM	Profile and Activity Tag Best Practices	This session will discuss and demonstrate the need for and use of activity and profile tags. Activity tags are used to categorize features in WellSky® Personal Care based on your agency's needs. Activity tags are a great way to track internal notes, organize information, and group interactions with all profile types. Profile tags allow profiles in WellSky® Personal Care to be classified and grouped in specific ways.
3:45 PM	4:00 PM	Break	Let's take a short break.
4:00 PM	4:50 PM	Family Room, Change in Condition, Hospitalization	This session is a complete walkthrough demonstrating the setup, enablement, and utilization of the family room, change in condition, and hospitalization & readmission features.
4:50 PM	5:30 PM	Referral Source Best Practices	Referral Sources will help your office to identify and manage referral sources. This session will cover creating profiles and referral source tracking and reporting tools.
5:30 PM	6:00 PM	Panel Discussion and Q & A with solution experts	We will end the day with a panel discussion and Q & A with solution experts.

Day Two – Thursday, June 22, 2023 (Times listed in Eastern Daylight Time)

Start Time	End Time	Session Title	Session Description
10:30 AM	10:40 AM	Welcome/Housekeeping	Welcome to Day 2! This session reviews today's housekeeping items.
10:40 AM	10:55 AM	WellSky® Personal Care Roadmap	A review of upcoming items on the roadmap.
10:55 AM	11:55 AM	Scheduling	This session will be a complete walkthrough demonstrating scheduling in WellSky® Personal Care. We will also cover some quick tips and tricks to simplify scheduling in the solution.
11:55 AM	12:25 PM	Caregiver Mobile Application	This session will demonstrate how to enable access to and utilize the WellSky® Personal Care mobile application. We will examine everything from updating a caregiver's profile to the full clock-in and clock-out process.
12:25 PM	12:40 PM	Break	Let's take a short break.
12:40 PM	1:10 PM	Admin On-Call Mobile Application	This session will demonstrate how to enable access to and utilize the WellSky® Personal Care Admin application. We will highlight ease-of-use features and use case scenarios.
1:10 PM	2:10 PM	Reporting	We will walk through standard, custom, and analytics reporting. The focus will be on the expanded functionality of analytics, highlighting benchmark reporting and other high-level financial reporting.
2:10 PM	2:40 PM	Lunch	Let's take a short break for lunch.
2:40 PM	3:10 PM	Billing Process	In this session, we will go over the billing process in WellSky® Personal Care and discuss some helpful tips and recommended methods for billing.
3:10 PM	3:40 PM	Payroll Process	During this session, we will cover payroll processes and explore some helpful guidelines and recommended approaches for managing payroll in the WellSky® Personal Care solution.
3:40 PM	4:10 PM	Receivables	This session will demonstrate general best practices and recommended processes for processing receivables in WellSky® Personal Care.
4:10 PM	4:25 PM	Break	Let's take a short break.
4:25 PM	4:55 PM	Support Hub	Overview of the WellSky® Personal Care Support Hub, how to access content, and how to contact our WellSky® Personal Care product support team via cases.
4:55 PM	5:30 PM	Best Practice Overview	This session will overview various tips and tricks in the WellSky® Personal Care platform that our agencies use to save time and ensure accurate billing, payroll, and receivables.
5:30 PM	6:00 PM	Panel Discussion and Q & A with solution experts	We will end the summit with a panel discussion and Q & A with solution experts.

*Please note, the training summit schedule is subject to change.