Welcome to the 2023 CareTend Training Summit! All attendees can attend any session. When purchasing a pass, each attendee has access to the associated Training Summit course in the WellSky Training Center where each session recording is stored and is available for one year. Some sessions may contain additional materials for attendees to review before and after an event takes place.
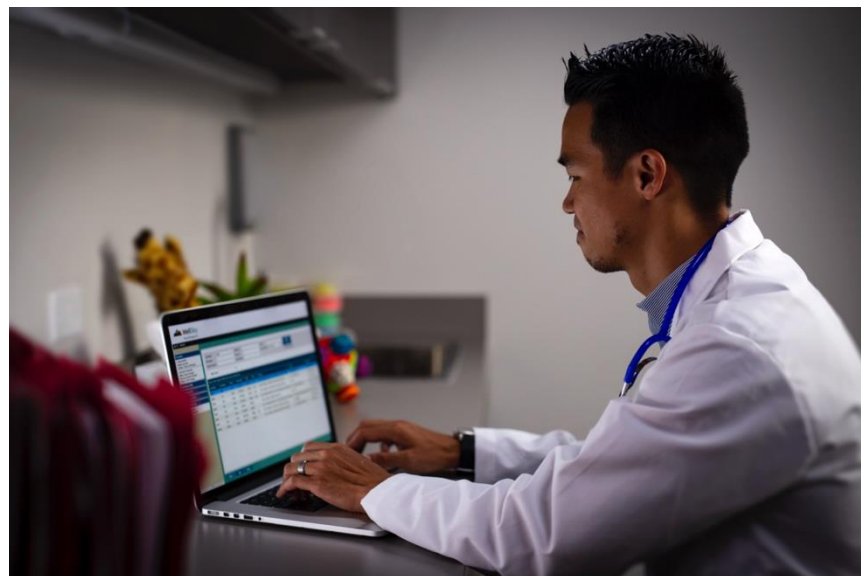
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The schedule updated on 5/16/2023[1]

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[1] Please note the schedule is subject to change. Please check https://training.wellsky.com for the latest schedule.

WellSky Training Services

Day 1 • Wednesday, May 24, 2023

Start Time	End Time	Beginner Track	Session Description
8:30 AM	8:50 AM	Introduction to Track 1 and Track 2	Let's review today's schedule and how to get the most out of today's sessions.
9:00 AM	9:45 AM	CareTend Basics: Workflows	Learn about CareTend workflows at a high level for all lines of business.
10:00 AM	10:45 AM	CareTend Basics: Intake & Orders	This session introduces the Incoming Documents queue and walks through the order process.
11:00 AM	12:00 PM	CareTend Basics: Deliveries	This session walks through creating deliveries and what you need to know about Delivery Tickets.
12:00 PM	1:00 PM	Lunch Break	
1:00 PM	1:45 PM	CareTend Basics: Billing Workflow – Part 1	This session walks through confirming delivery tickets and beginning the billing process.
2:00 PM	2:45 PM	CareTend Basics: Billing Workflow – Part 2	Let's learn about how to process claims and post payments at a high level.
3:00 PM	4:00 PM	CareTend Basics: Inventory Overview	This session reviews the key process of managing your inventory.

Start Time	End Time	CareTend BI & Inventory Track	Session Description
8:30 AM	8:50 AM	Introduction to Track 1 and Track 2	Let's review today's schedule and how to get the most out of today's sessions.
9:00 AM	9:45 AM	CareTend BI Overview	First, let's review navigating the CareTend BI landing page, the toolbar functions, and general functionality.
10:00 AM	10:45 AM	Reporting with CareTend BI: Part 1	Let's dive deeper into CareTend BI and review examples of each content type, create layouts, and more.
11:00 AM	12:00 PM	Reporting with CareTend BI: Part 2	Let's demonstrate CareTend BI as a data management tool with some scenario-based examples.
12:00 PM	1:00 PM	Lunch Break	
1:00 PM	1:45 PM	Inventory 101: Setup Items	First, let's review how to set up inventory items.
2:00 PM	2:45 PM	Inventory 101: Purchasing & Transfers	This session demonstrates how to perform purchase orders and inventory transfers.
3:00 PM	4:00 PM	Inventory 101: Physical Inventory	Let's wrap up this Inventory Module with an overview of managing your quantities on hand.

Day 2 • Thursday, May 25, 2023

Start Time	End Time	Billing Track	Session Description
8:30 AM	8:50 AM	Introduction: Upcoming Features	Let's hear from our Sales team about some upcoming features.
9:00 AM	9:45 AM	Payer & Pricing Rules: Part 1	Let's review setting up pricing rules and how these settings affect your workflow.
10:00 AM	10:45 AM	Payer & Pricing Rules: Part 2	Next, let's review setting up payer rules and how these settings affect your workflow.
11:00 AM	12:00 PM	Per Diem/Kit Billing Rules	This session will introduce the new Per Diem/Kit Billing rule and how to utilize it.
12:00 PM	1:00 PM	Lunch Break	
1:00 PM	1:45 PM	Claim Type Settings	This session walks through how to create, manage, and process medical claims.
2:00 PM	2:45 PM	Processing Claims: Part 1 (Pharmacy & Medical)	Learn about how to create, manage, and process pharmacy claims.
3:00 PM	4:00 PM	Processing Claims: Part 2 (Claim Exceptions)	Let's review claim exceptions like reversals, order cancellations, and more.

Start Time	End Time	IV Workflow & Patient Management Track	Session Description
8:30 AM	8:50 AM	Introduction: Upcoming Features	Let's hear from our Sales team about some upcoming features.
9:00 AM	9:45 AM	Intake & Patient Records	This session dives deeper into the intake processes and managing patient records.
10:00 AM	10:45 AM	IV Workflow: Part 1 (Orders)	Let's break down the fundamental queues in the IV workflow.
11:00 AM	12:00 PM	Templates	Let's discuss the best practices for using templates and how to utilize them in the workflow process.
12:00 PM	1:00 PM	Lunch Break	
1:00 PM	1:45 PM	IV Workflow: Part 2 (POs, TPNs)	Let's demonstrate how to enter and process POs and TPNs.
2:00 PM	2:45 PM	Recurring Rentals	In this session, we will review the Recurring Rentals Manager.
3:00 PM	4:00 PM	Managing Refills, Discharging a Patient	This session reviews how to manage orders in the Zero Doses Remaining queue.

Day 3 • Friday, May 26, 2023

Start Time	End Time	Billing Track	Session Description
9:00 AM	9:45 AM	A/R Management: Part 1 (A/R Manager)	Let's discuss how to use the A/R Manager.
10:00 AM	10:45 AM	A/R Management: Part 2 (Billing Notes)	Next, let's review using billing notes and the Notes Manager.
11:00 AM	12:00 PM	Bill for Denial	This session dives into billing Medicare for denial and subsequently billing the true payer after the denial has been received.
12:00 PM	1:00 PM	Lunch Break	
1:00 PM	1:45 PM	Cash Posting	Let's review single posting and batch posting.
2:00 PM	2:45 PM	ERN Posting	Learn about how to process electronic EOB files (835).
3:00 PM	4:00 PM	Optional Q&A	Trainers are available to answer questions.

Start Time	End Time	SPRx Workflow & Patient Management Track	Session Description
9:00 AM	9:45 AM	SPRx Workflow: Part 1	Let's review how SPRx orders move through the workflow and how to process partial fills.
10:00 AM	10:45 AM	SPRx Workflow: Part 2	We will use this time to expand on SPRx Workflow: Part 1.
11:00 AM	12:00 PM	Process Queue Exceptions	Now, let's review how to manage process queue exceptions.
12:00 PM	1:00 PM	Lunch Break	
1:00 PM	1:45 PM	Care Plans and Outcomes	This session reviews how to manage refills from the Zero Doses Remaining queue and more.
2:00 PM	2:45 PM	Custom Assessments	Let's explore managing partial fills and single-dose vials (discard of waste).
3:00 PM	4:00 PM	Optional Q&A	Trainers are available to answer questions.