AGENDA - DAY 1

Topic	Description	Time (CST)
Welcome Session & Housekeeping	Welcome message	9:30 AM – 9:40 AM
Key Features	Overview of new features released in WellSky® Personal Care that you may have missed in the past several months.	9:40 AM – 10:10 AM
Prospect to Client Intake Process	This session will include the process of adding in a prospective Client, converting them to a client, and adding all of the details to the Client Profile.	10:10 AM – 11:10 AM
Break (15 minutes)		11:10 AM – 11:25 AM
Applicant and Caregiver Management	This session will include the process of adding in an applicant Caregiver, converting them to a caregiver, and adding all of the details to the skills, background, and certifications.	11:25 AM – 12:25 PM
Lunch (30 minutes)		12:25 PM – 12:55 PM
Custom Forms	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.	12:55 PM – 1:55 PM
Profile and Activity Tag Best Practices	This session will discuss and demonstrate the need and use of both Activity tags and Profile tags.	1:55 PM – 2:45 PM
Break (15 minutes)		2:45 PM – 3:00 PM
Family Room, Change in Condition, Hospitalization	A complete walkthrough demonstrating the setup, enablement, and utilization of the Family Room, Change in Condition, and Hospitalization & Readmission features.	3:00 PM – 3:50 PM
Referral Source Best Practices	Referral Sources will help your office to identify and manage referral sources. This session will cover creating a profile as well as tracking and reporting tools for referral sources.	3:50 PM – 4:30 PM
Panel Discussion and Q&A	Discussion with WellSky® Personal Care solution experts.	4:30 PM – 5:00 PM

AGENDA - DAY 2

Topic		Time (CST)
Welcome & Housekeeping	Welcome message	9:30 AM – 9:40 AM
Initiatives / Roadmap	A review of upcoming items, as provided by sales.	9:40 AM – 9:55 AM
Scheduling	A complete walkthrough demonstrating scheduling in WellSky® Personal Care. We will also cover some quick tips and tricks to make scheduling in WellSky® Personal Care even easier.	9:55 AM – 10:55 AM
Caregiver Application	A demonstration of how to enable access to and utilize the WellSky® Personal Care mobile application, from updating Caregiver's profile to full clock in and out process.	10:55 AM – 11:10 AM
Break (15 minutes)		11:10 AM – 11:25 AM
Admin On-Call Application	This session will be a demonstration of how to enable access to and utilize the WellSky® Personal Care Admin application. We will highlight ease of use features and use case scenarios.	11:25 AM – 11:40 AM
Reporting	A complete walkthrough of Standard, Custom, and Analytics reporting. Focus on expanded Analytics functionality, highlighting benchmark and other high level financial reporting.	11:40 AM – 12:25 PM
Lunch (30 minutes)		12:25 PM – 12:55 PM
Rates 2.0	A complete walkthrough of Rates 2.0 with our guest Andrea.	12:55PM – 1:40 PM
Billing Best Practices	This session will demonstrate the complete billing process, as well as discuss some general best practices and recommended processes for billing in WellSky® Personal Care	1:40 PM – 2:10 PM
Payroll Best Practices	This session will demonstrate the complete payroll process, as well as discuss some general best practices and recommended processes for payroll in WellSky® Personal Care.	2:10 PM – 2:40 PM
Receivables	This session will demonstrate general best practices and recommendations for processing receivables in WellSky® Personal Care.	2:40 PM – 3:10 PM
Break (15 minutes)		3:10 PM – 3:25 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.	3:25 PM – 3:55 PM
Best Practice Overview	An overview of various tips and tricks in the WellSky® Personal Care platform that our agencies use to save time in their day to day, and to ensure accurate billing, payroll, and receivables.	3:55 PM – 4:30 PM
Panel Discussion and Q&A	Discussion with WellSky® Personal Care solution experts.	4:30 PM – 5:00PM