

Welcome to the **2024 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 the event takes place.

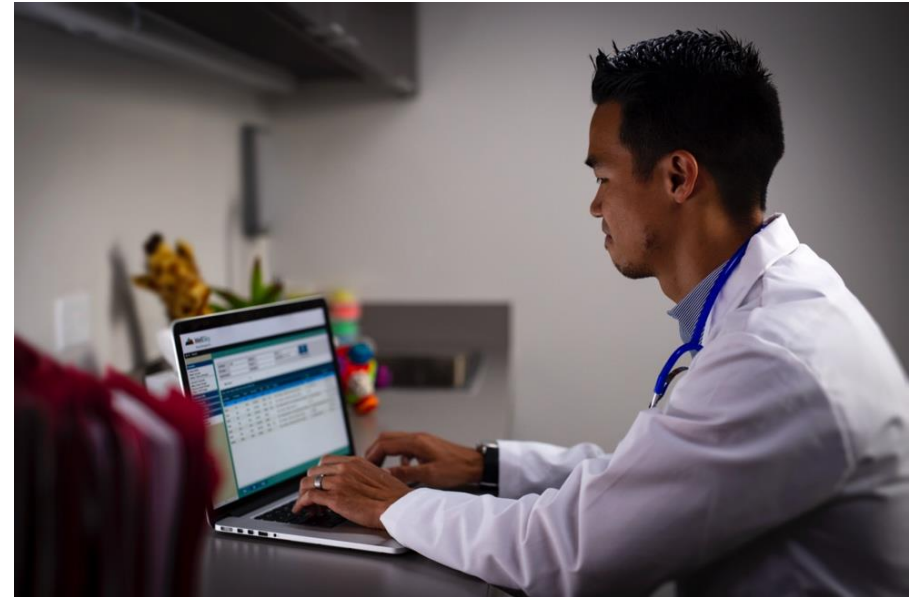


Table of Contents

**Day 1 • Tuesday, November 5, 2024.....2**

**Day 2 • Wednesday, November 6, 2024 .....3**

**Day 3 • Thursday, November 7, 2024 .....4**

The schedule updated on 9/27/2024<sup>1</sup>

<sup>1</sup> Please note the schedule is subject to change. Please check <https://training.wellsky.com> for the latest schedule.

## Day 1 • Tuesday, November 5, 2024

Start Time	End Time	CareTend Capabilities Track	Session Description
9:00 AM	9:10 AM	Introduction	Let's review the schedule and how to get the most out of today's sessions.
9:10 AM	10:00 AM	CareTend Nurse Navigator: Part 1	Let's discuss how to utilize the Resource Manager for daily tasks and capture EVV data.
10:10 AM	11:00 AM	CareTend Nurse Navigator: Part 2	Custom Assessments using Dynamic Forms can build forms and assessments with conditional logic.
11:10 AM	12:00 PM	Supporting Our Clients	Our Support team joins us to share our latest support strategies and the useful self-service options.
12:00 PM	1:00 PM	Lunch Break	
1:00 PM	1:50 PM	CareTend BI: Layouts	Join us to review creating, managing, and sharing of Explorer Library and content item layouts.
2:00 PM	2:50 PM	CareTend BI: Jobs & Tasks	Automate your reports with jobs and tasks, including security settings and Destinations setup.
3:00 PM	4:00 PM	Q&A	The Presenters of this track day will reconvene to answer your questions.

Start Time	End Time	CPR+ Migration Track	Session Description
9:00 AM	9:10 AM	Introduction	Let's review the schedule and how to get the most out of today's sessions.
9:10 AM	10:00 AM	Migration Tool – Best Practices	Join us to review the best practices of the Migration Tool to support your migration efforts.
10:10 AM	11:00 AM	Data Clean-Up: Part 1	The data clean-up process is integral in ensuring a smooth transition. We will use this time for a detailed walkthrough of how to prepare your data for migration.
11:10 AM	12:00 PM	Data Clean-Up: Part 2	This session is a continuation of Data Clean-Up: Part 1.
12:00 PM	1:00 PM	Lunch Break	
1:00 PM	1:50 PM	Infusion Workflow	Let's discuss the new Rx on-file capabilities and fundamental queues of the Infusion (IV) workflow.
2:00 PM	2:50 PM	Specialty Pharmacy Workflow	Let's review how SPRx orders move through the workflow and how to process partial fills.
3:00 PM	4:00 PM	Q&A	The Presenters of this track day will reconvene to answer your questions.

## Day 2 • Wednesday, November 6, 2024

Start Time	End Time	Billing Track	Session Description
9:00 AM	9:10 AM	Introduction	Let's review today's schedule and how to get the most out of today's sessions.
9:10 AM	10:00 AM	Payer & Pricing Rules	Let's review pricing and billing rules and how these calculations affect your workflow.
10:10 AM	11:00 AM	Per Diem/Kit Billing Rules	This session will introduce the new Per Diem/Kit Billing rule and how to utilize it.
11:10 AM	12:00 PM	Corrected Claims & Credit Rebill	Next, we will review how to manage claims and the rebilling process.
12:00 PM	1:00 PM	Lunch Break	
1:00 PM	1:50 PM	ERN Posting & Batch Posting	Learn about batch posting and how to process electronic EOB files (835).
2:00 PM	2:50 PM	A/R Manager	Next, let's review best practices of using the A/R Manager and learn how to leverage the Status feature.
3:00 PM	4:00 PM	Q&A	The Presenters of this track day will reconvene to answer your questions.

Start Time	End Time	Inventory Track	Session Description
9:00 AM	9:10 AM	Introduction	Let's review today's schedule and how to get the most out of today's sessions.
9:10 AM	10:00 AM	Equipment Manager	This session examines best practices to implement, utilize, and log maintenance in the Equipment Manager.
10:10 AM	11:00 AM	Recurring Rentals	In this session, we will review reimbursement processes using the Recurring Rentals Manager.
11:10 AM	12:00 PM	Purchase Orders (POEDI)	Learn about bulk-shipping and drop-shipping purchase orders with POEDI.
12:00 PM	1:00 PM	Lunch Break	
1:00 PM	1:50 PM	Committed Quantities	Join us to learn about perpetual inventory functions and when items are committed and deducted.
2:00 PM	2:50 PM	Physical Inventory	This session covers managing physical inventory at a point in time and recording batches.
3:00 PM	4:00 PM	Q&A	The Presenters of this track day will reconvene to answer your questions.

## Day 3 • Thursday, November 7, 2024

Start Time	End Time	Advanced Topics	Session Description
9:00 AM	9:10 AM	Closing Announcements	Let's talk about closing items like completing the survey and where to view recordings.
9:10 AM	10:00 AM	Snowflake: Custom Reporting	Learn about how to utilize Snowflake to access data and create custom reports.
10:10 AM	11:00 AM	Controlled Substance Reporting	Learn about automating the submission of your controlled substance reports.
11:10 AM	12:00 PM	Scanning Incoming Documents & Barcode Tracking	This session reviews how to scan incoming documents, utilize barcode tracking, and set up auto-assignment of documents.

Start Time	End Time	System Administration Topics	Session Description
9:00 AM	9:10 AM	Closing Announcements	Let's talk about closing items like completing the survey and where to view recordings.
9:10 AM	10:00 AM	Drug Inventory Setup	In this session, let's dive deep into drug item settings and clinical information of drugs.
10:10 AM	11:00 AM	Security Setup	Learn about CareTend's role-based security setup and individual vs. group settings.
11:10 AM	12:00 PM	Telerik Designer	Join us to learn how to use the Telerik designer to design labels, delivery tickets, and forms.