

## **2025 CareTend Training Summit Agenda**

## **Tuesday, October 28**

Start Time	End Time	Clinical Workflow Track	Billing Track
8:00 AM	9:00 AM	Registration, Networking Breakfast & Coffee	
9:00 AM	9:15 AM	Kickoff: Welcome/Introductions	
9:15 AM	10:00 AM	Patient Care Patient Account, Care Plans, Progress Notes, and CareTend To Do's	Payer Pricing and Billing Rules Deep-dive on payer contracts
10:00 AM	10:10 AM	Break	
10:10 AM	11:00 AM	Processing Drugs  IV/INJ, multi-drug orders, TPNs, drug templates	Per Diem Kit Billing Rules Demonstration of setup and processing
11:00 AM	11:10 AM	Break	
11:10 AM	12:00 PM	<b>Delivery Tickets &amp; Printing Labels</b> Demonstration of DT best practices and overview of labels	Billing Administration Review Insurance Company setup and billing-related Templates
12:00 PM	1:00 PM	Lunch Break	
1:00 PM	1:50 PM	CareTend Roadmap & CareTend Managed Services A look into the future, plus new ways we can serve your organization!	Replacing CPR+ Splitting Delivery Tickets in CareTend Utilize the Billing Review queue and Ready to Bill queue best practices
1:50 PM	2:00 PM	Break	
2:00 PM	2:50 PM	CareTend Nursing: Part 1 Explore WellSky Resource Manager capabilities	Billing Procedures Bill for Denial, ERN, claims creation
2:50 PM	3:00 PM	Break	
3:00 PM	4:00 PM	CareTend Nursing: Part 2 Explore Custom Assessments by Dynamic Forms	A/R Manager - Batch Billing and Secondary/Tertiary Payers Program Options, transfer balance
4:30 PM	6:30 PM	CLIENT APPRECIATION HAPPY HOUR sponsored by CareTend Managed Services. Don't miss out!	





## Wednesday, October 29

Start Time	End Time	System Administration Track	Inventory and Reporting Track
8:00 AM	9:00 AM	Registration, Networking Breakfast & Coffee	
9:00 AM	9:15 AM	Kickoff: Welcome/Introductions	
9:15 AM	10:00 AM	API Library Overview  How to find resources and potential use cases	<b>Drug Item Setup</b> Deep-dive on drug inventory, DSCSA
10:00 AM	10:10 AM	Break	
10:10 AM	11:00 AM	Maintenance Files Review Security Setup, Employee Setup, Lookup Editor, Companies, and Templates overview	<b>Equipment Management 101</b> Review equipment item setup, Equipment Manager, Recurring Rentals, plus exchange and pick-up tickets
11:00 AM	11:10 AM	Break	
11:10 AM	12:00 PM	Queue Management Utilize queue settings, process queue exceptions, automate delivery ticket confirmation	Inventory Transfers and Purchase Orders  Demonstrate processes, using Templates to streamline, DSCSA
12:00 PM	1:00 PM	Lunch Break	
1:00 PM	1:50 PM	<b>Utilities Best Practice</b> Controlled Substance Report automation, Program Options	CareTend BI: Layouts Overview, Content Explorer, customization, and layouts
1:50 PM	2:00 PM	Break	
2:00 PM	2:50 PM	Resolve Committed Inventory Issues  Manage your prescriptions filled that are not dispensed	CareTend BI: Financial Reporting Workshop Review the recommended reports for period-end closing
2:50 PM	3:00 PM	Break	
3:00 PM	4:00 PM	<b>Trouble-Shooting &amp; Self-Service Tools</b> Resolve common errors, CRC, and knowledge-based articles	CareTend BI: Operational Reporting Workshop Review best practice operational reporting
		End of Event	