2025 Aging & Disability Training Summit Session Summary

<u>Aging & Disability Content Track</u>

Session 1: A&D Best Practices: Onboarding New Users

-   A common request for WellSky Services is to assist with ideas for training new staff. This session is intended to provide guidance for organizations on a best practice approach to onboarding users with the most common areas of the Aging & Disability solution.

Session 2: A&D Best Practices: NAPIS Reports for OAAPS

-   The third year of federal reporting in OAAPS is behind us. Let's explore the tools, troubleshooting tips, and review some best practices for a successful State Performance Report (SPR) submission for FFY 2025 and beyond. Whether you're new to submitting your organization's SPR or have been doing it for years, this session is designed for you.

Session 3: Tech Services Overview: Data Cleanup, Data Conversions, and Beyond

-   Join members of the WellSky Technical Services team to provide an overview of what additional services are available while working with WellSky Managed and Contracted Services. Topics include data conversion, data cleanup, custom data analysis scripting, and more.

Session 4: A&D Best Practices: Unit Rates, Fiscal Reporting for OAAPS

-   Does your organization maintain service expenditures outside of Aging & Disability? This session will focus on unit rates, fund identifiers, contracts, unit distribution, and fiscal reporting for OAAPS.

Session 5: A&D Enhancement List Review & Discussion

-   As WellSky proceeds with the roadmap for the Aging & Disability solution, the Services Team is collaborating with Product Solutions on identifying areas that could benefit the entire customer base with thought-out enhancements derived from years of feedback and conversations. Join this session to see detailed proposals for feature enhancements with potential to be included in the Product roadmap and what you can do to help establish interest and priority.

General Keynote Session (Day 2)

A&D Best Practices: Emergency Preparedness - Data Collection and Reporting Solution

-   Natural disasters can affect everyone, whether it's an ice storm, wildfire, hurricane, or another emergency. Having accurate participant information is crucial. From requiring electricity for in-home oxygen use to mobility concerns, the WellSky Services team has created a customizable assessment and advanced reporting solution to support your AAA, SUA, and emergency preparedness teams.

Session 6: Open Q&A

-   Join the WellSky Services team and bring your questions! This session is intended to provide an open forum to review best practices in the Aging & Disability solution.

<u>Advanced Reporting Content Track</u>

Session 1: Introduction to HAR

- New to Advanced Reporting or curious about what it could offer? This session will provide a high-level walkthrough of Advanced Reporting, how it is used and examples of the types of reports you will be able to build.

Session 2: Working with Assessment Data

- In this session, we will examine Assessment data in HAR and how it is structured. We will walk through the Assessment schema, discuss how to pull Notes and the differences between Responses and Choices.

Session 3: Introduction to SQL Basics

- SQL, or Structured Query Language, is the programming language behind report builder. Understanding SQL can have a profound impact on Report Builder's capability. In this session, we cover the basics of SQL, how to write your own queries, and establish a foundation of knowledge that you can build upon.

Session 4: Flattening Data

- Flattening Data is a common request in Reporting, especially when working with Assessments. It is the process of converting Rows of data into Columns. In this session, we will explore different methods of Flattening data, and will include topics such as CTEs, Temp Tables, Advanced Grouping and Window Functions.

Session 5: Client Presentation - Dick Harmon

- Dick Harmon is the Database Administrator for Iowa's Six Area Agencies on Aging and has been a longtime HAR user. In this session, he will talk about his process for writing complex reports, and how he and his Agencies are linking Service data to Assessment data in HAR to meet new State and Federal program evaluation requirements for all service programs such as malnutrition, food insecurity and social isolation.

Session 6: Open Q&A

- Join the WellSky Services team and bring your questions! This session is intended to provide an open forum to review best practices in the Advanced Reporter solution.