

## Day 1 • Tuesday, November 4th, 2025

| Start Time | End Time | Day 1                                                    |
|------------|----------|----------------------------------------------------------|
| 8:30 AM    | 8:35 AM  | Welcome Session                                          |
| 8:35 AM    | 8:45 AM  | Dashboard Overview                                       |
| 8:45 AM    | 9:00 AM  | WellSky Personal Care Alerts/Roles/Admin Alerts          |
| 9:00 AM    | 9:15 AM  | Client Resource Center                                   |
| 9:15 AM    | 9:25 AM  | Managing Administrator Profiles/Roles                    |
| 9:25 AM    | 10:25 AM | Agency Settings Overview: Power Tools & General Settings |
| 10:25 AM   | 10:40 AM | Break                                                    |
| 10:40 AM   | 11:40 AM | Custom Forms                                             |
| 11:40 AM   | 12:10 PM | Agency Settings Overview: Accounting                     |
| 12:10 PM   | 12:40 PM | Lunch Break                                              |
| 12:40 PM   | 1:10 PM  | Payment Processing                                       |
| 1:10 PM    | 1:30 PM  | Agency Settings Overview: Staff & Clients                |
| 1:30 PM    | 2:30 PM  | Onboarding a Client Best Practices                       |
| 2:30 PM    | 2:45 PM  | Break                                                    |
| 2:45 PM    | 3:30 PM  | Care Insights including Hospitalization and CIC          |
| 3:30 PM    | 3:40 PM  | Team Insights                                            |
| 3:40 PM    | 4:00 PM  | Turning the Family Room into an Asset                    |
| 4:00 PM    | 4:30 PM  | Panel Discussion and Q&A with Solution Experts           |

## Day 2 • Wednesday, November 5th, 2025

| Start Time | End Time | Day 2                                                                   |
|------------|----------|-------------------------------------------------------------------------|
| 8:30 AM    | 8:35 AM  | Welcome Session & Housekeeping Items                                    |
| 8:35 AM    | 9:20 AM  | Onboarding a Caregiver Best Practices                                   |
| 9:20 AM    | 10:05 AM | Caregiver Mobile Application/Telephony                                  |
| 10:05 AM   | 10:20 AM | Break                                                                   |
| 10:20 AM   | 10:35 AM | Admin On Call Application/Telephony                                     |
| 10:35 AM   | 11:25 AM | Documentation: Activity/Profile Tags, Marketing Outreaches, & Reporting |
| 11:25 AM   | 11:45 AM | Analytics: Dashboard Creation                                           |
| 11:45 AM   | 12:15 PM | Lunch Break                                                             |
| 12:15 PM   | 12:45 PM | Analytics: Dimensions/Measures                                          |
| 12:45 PM   | 1:45 PM  | Rates 2.0                                                               |
| 1:45 PM    | 2:00 PM  | Break                                                                   |
| 2:00 PM    | 2:45 PM  | Scheduling Best Practices                                               |
| 2:45 PM    | 3:00 PM  | Ad Hoc Scheduling                                                       |
| 3:00 PM    | 3:20 PM  | FCSS                                                                    |
| 3:20 PM    | 3:55 PM  | Receivables Best Practices/Aging Report                                 |
| 3:55 PM    | 4:00 PM  | Professional Services Offerings                                         |
| 4:00 PM    | 4:30 PM  | Panel Discussion and Q&A with Solution Experts                          |