

2026 Bonafide Training Summit Planning

Event Details

Date (tentative): June 16-17

Format: Virtual – We'll contact registrants one week before the event!

Session Topics & Details

The following agenda highlights the topics we plan to cover throughout the event. The details of each topic may be modified to best meet attendee needs.

Day 1

Welcome to WellSky!

- **Meet leadership**
- **How to access the CRC and reach out to Support and Sales**
 - Updating/reworking “How to” articles into reference guides in CRC
 - Access release schedule updates in CRC
 - How to create cases and communicate on your ticket
- **Bonafide Database version Discussion:**
 - 1.0 vs 2.1 are you in the latest version?
- **AI developments: compliance for intake**
 - Referral documents passing through an AI compliance tool
 - Synthpop / Tenner
- **Connectivity Options with Bonafide**
 - Review existing API options
 - EDI vendors
- **Read Replica**
 - Data dictionary
 - Choosing BI and why it's important

Clicks and Tricks of Bonafide

Customer Maintenance

- Intake by Eligibility
- Inbound faxing queue to create patient record
- Task manager
- Trial Balance
- Alerts/Memos
- Statements
 - Tracking
 - Different ways you can print
 - Preference settings controls

Orders

- Using OPSteps and Task Manager to streamline order tracking.
- Using inventory packages
- Using master items
- Order entry and validation – Based on preference / payor and standard rules
- Order Actions - overview
- Order Inquiry screen – overview

Delivery & Pickup

- Using Shipping methods
- Routing and dispatching tools
- Mapping and automation
- Using Manifest for delivery optimization
- Using Mobile Delivery app
- Delivery exceptions and rescheduling using Manifest
- Proof of delivery – E Signature from Mobile
- Pick up Management

Day 2

Clicks and Tricks of Bonafide

Billing

- Invoice generation
- How to use the Search menu to provide a focused Billing queue
- Overview of blue buttons for order Validations
- Working billing holds

Claims

- Using Searching Options and Saving preferences for search
- Working Incomplete claims – Front end Edits
- Working Front End Rejections
- Working Denied and outstanding claims
 - Operational Dashboards
 - Using current Conditions
 - Submitting a Corrected claim Electronically

Posting

- Manual Payment posting
 - Patient Patients
 - Advanced Payments
 - Payment on Previous Invoices
- Adjustments / Write offs / Debit Adjustments
- Refund Posting

Inventory Management

- Mins/ Max
 - Using Recommendation / Request file
 - Creating PO from Request file
- Transfers
 - IOT
 - Quick Transfers
- Service Maintenance
 - Creating Service Documents
 - Creating a Service Ticket
 - Logging the service performed

Automations (See additional information: [Automations](#))

- Scheduled jobs
- Trigger-based workflows
- Notification and alert automations
- Exception handling logic

Automations

The following list of automations can be enabled upon request for your database. You can inform support of any of the below features you would like to auto run behind the scenes to automate your daily workflows.

1) Billing

Bonafide can automatically push your delivered orders through the billing process page if they are set to CLAIM to an actual insurance payor. *You have the following options* (in any combination):

- All Sale & Rental Orders
- Sale Orders Only
- All Rentals
- All Rentals month 2 and above Only

2) Recalculate Inventory

Bonafide can automatically recalculate all inventory daily at 10:22 PM (PST). This will help you in resolving issues where you had committed items and then released them and need the system to show these updates so that the inventory is available for other transactions.

3) Unallocated (Advanced) Patient Payments

Bonafide can automatically post Unallocated Patient Payments nightly for you. The system will review the unallocated patient payments, sweep the Customers patient level balances and if there is an amount that the insurance(s) have passed down to the Patient level it will auto associate those funds for you. If This is not enabled, they will just sit on this below page till someone manually posts the amounts to an open patient balance on the Customer's account.

4) Send EDI Claims

Bonafide can automatically submit for you any electronic claim currently sitting in a "Ready To Send" status. If this is enabled, they will automatically be sent during the next automatic send which is scheduled during the following times.

(EASTERN) 6:30 AM, 12:30 AM, 6:30 PM, 12:30 AM

(CENTRAL) 5:30 AM, 11:30 AM, 5:30 PM, 11:30 AM

(MOUNTAIN) 4:30 AM, 10:30 AM, 4:30 PM, 10:30 AM

(PACIFIC) 3:30 AM, 9:30 AM, 3:30 PM, 9:30 AM

5) Create and Track LMN

During nightly services, Bonafide can automatically create and Track an LMN for any order that is either:

- Confirmed today that does not already have an LMN created and tracked for that HCPCS code.
- Created and saved.

6) LMN Auto-Fax Functionality

Bonafide can automatically fax an LMN that is not logged if the feature is requested to be turned on. If you do not want a specific Physician to be Auto faxed, you will edit the physicians' record and remove the Fax Communication flag.

7) Fax Expiring LMN

Bonafide can automatically Fax an LMN that is going to be expiring soon. This will Queue up to 30 days in advance of the expiration date and be sent electronically.

8) Auto-RE-Fax LMN

Bonafide can automatically RE-Fax an LMN that was faxed and not yet logged. This will Queue up 14 days from the last fax send date to be sent again.

NOTE: 3 Fax attempts will be made with the Re-Fax Option and then will no longer be sent and will need to be managed through the UI and manual fax.

9) PO EDI

- 850 - Sending the EDI PO – for all PO’s that are setup with an EDI vendor and are in “Ready to send” Status BF will sweep and push the POs out to the Vendors
- 997 /855 – Accept / Rejection of Transmission – Creates a Vendor Log report
- 856 – Shipping Acknowledgement – automatically puts ship / tracking # and receives the PO
- 810 – Vendor Invoice can automatically come into the BF system
- EPOD