

2026 WellSky CareTend Training Summit

Day 1 - Tuesday, October 13

Start Time	End Time	Billing & WellSky CareTend Enhancements Auditorium	Inventory & WellSky CareTend BI Training Rooms
8:00 AM	9:00 AM	Registration, Networking Breakfast & Coffee	
9:00 AM	9:10 AM	Kickoff: Welcome/Introductions	
9:15 AM	9:50 AM	Insurance Companies & Authorizations Configuration	Inventory 101
9:50 AM	10:00 AM	Break	
10:00 AM	10:50 AM	Payer Pricing & Billing Rules	Equipment Setup, Recurring Rentals, & Rent to Own
10:50 AM	11:00 AM	Break	
11:00 PM	12:00 PM	Per Diem / Kit Billing Rules	Drug Item Setup
12:00 PM	1:00 PM	Lunch Break	
1:00 PM	1:50 PM	The Future of WellSky CareTend: Roadmap & Roadshow	WellSky CareTend BI: Layouts & Configuration Setup
1:45 PM	2:00 PM	Break	
2:00 PM	3:00 PM	Dynamic Forms: Custom Assessments	WellSky CareTend BI: Downtime Procedures Reporting
3:00 PM	4:00 PM	End of Day 1 sessions. Decompress before heading to the Happy Hour!	
4:00 PM	6:00 PM	Happy Hour at Atomic Cowboy - Overland Park!	





Session Descriptions

INSURANCE COMPANIES & AUTHORIZATIONS CONFIGURATION

Learn how insurance company setup for authorization requirements impact the intake, order, and billing processes. This session will show how configuration choices can affect auto-generation, manual work, and claims.

PAYER PRICING & BILLING RULES

This session explains key payer pricing settings, billing rules, modifiers, HCPC codes, fee schedules, and contract-based billing logic. Learners will see how these settings are configured and how they affect order billing and outcomes later in the process.

PER DIEM / KIT BILLING RULES

Review how Per Diem / Kits are set up and managed in your system. We'll demonstrate how these settings support combining supplies into a Per Diem or Kit code for proper billing.

THE FUTURE OF WELLSKY CARETEND: ROADMAP & ROADSHOW

This session introduces the exciting future of WellSky CareTend and the enhancements to come. Then, we'll explore broader WellSky offerings and partner solutions that may support your organization's specific needs.

DYNAMIC FORMS: CUSTOM ASSESSMENTS

This session introduces Dynamic Forms configuration, including forms setup, creating templates, and using associated components. Learners will gain a high-level understanding of how the Dynamic Forms feature can help your organization collect consistent patient assessment data.

INVENTORY 101

This session introduces key inventory concepts, including answering your common questions about supply kit templates, inventory fields, and managing quantities. Learners will also review newer inventory functionality and how inventory setup impacts downstream processes and reporting.

EQUIPMENT SETUP, RECURRING RENTALS, & RENT TO OWN

Review equipment setup, equipment templates, tracking dates, recurring rental processing, and rent-to-own configuration. This session will also cover how tracking and setup decisions support accurate equipment management in WellSky CareTend.

DRUG ITEM SETUP

Learn how drug item setup impacts compounding instructions, lot assignment, authorizations, and different drug type workflows. This session will highlight best practices when entering drug fields for more consistent workflow outcomes.

WELLSKY CARETEND BI: LAYOUTS & CONFIGURATION SETUP

This beginner-friendly session introduces CareTend BI setup, Content Library organization, content item tags, and available help resources. Learners will gain a foundation for navigating and organizing reporting content more effectively.

WELLSKY CARETEND BI: DOWNTIME PROCEDURES REPORTING

Learn how CareTend BI can support downtime planning through SFTP setup and scheduled report delivery. This session will review key reporting considerations that help teams maintain access to important information during downtime.

2026 WellSky CareTend Training Summit

Day 2 - Wednesday, October 14

Start Time	End Time	Billing, AI Innovations, & Managing Claims Auditorium	Best Practices & WellSky CareTend BI Training Rooms
8:00 AM	9:00 AM	Registration, Networking Breakfast & Coffee	
9:00 AM	9:10 AM	Kickoff: Welcome/Introductions	
9:15 AM	9:50 AM	Unapplied Cash / ERN Posting	Non-Workflow Items
9:50 AM	10:00 AM	Break	
10:00 AM	10:50 AM	Bill for Denial	Templates: Best Practices
10:50 AM	11:00 AM	Break	
11:00 PM	12:00 PM	Applying Billing Concepts	Understanding Workflow Queues
12:00 PM	1:00 PM	Lunch Break	
1:00 PM	1:50 PM	AI Innovations & Client Experience	WellSky CareTend BI: Operational Reporting
1:45 PM	2:00 PM	Break	
2:00 PM	2:50 PM	NCPDP: Electronic Pharmacy Claims	WellSky CareTend BI: Financial Reporting (Part 1)
2:50 PM	3:00 PM	Break	
3:00 PM	4:00 PM	Managing Medical Claims	WellSky CareTend BI: Financial Reporting (Part 2)
		End of the event. Thank you for joining us!	





Session Descriptions

UNAPPLIED CASH / ERN POSTING

Learn how to manage unapplied cash balances and related Activities in WellSky CareTend. This session will also review Electronic Remittance Notice setup and how cash posting can be automated based on clearinghouse configuration.

BILL FOR DENIAL

This session explains how to configure payers to support the Bill for Denial process. Learners will gain a better understanding of how setup impacts successful use of this feature.

APPLYING BILLING CONCEPTS

Explore how payer and rule configuration impacts order entry and how information on the order impacts invoice creation. Our experts will demonstrate the order process using different examples of Per Diem / Kit rules, pricing rule, billing option rules, and payer claim type settings.

AI INNOVATIONS & CLIENT EXPERIENCE

This session will emphasize how we are using AI to make our Support content easier to find. By combining our technical documentation with knowledge articles and Support cases, we are ensuring your voices are heard, and WellSky teammates are working to ensure we're utilizing AI to create high-quality tools and content.

NCPDP: ELECTRONIC PHARMACY CLAIMS

Learn how CareTend creates and transmits electronic pharmacy claims and how to interpret claim responses. This session will also review common issue areas, including transmission setup, notes management, and delivery ticket confirmation.

MANAGING MEDICAL CLAIMS

This session provides training on medical claim settings, including what they do and when they should be used. Participants will also review the end-to-end workflow for processing and managing claims.

NON-WORKFLOW ITEMS

Explore WellSky CareTend features that support secondary operational functions, including inventory transfers, POEDI, prescription transfers, and delivery tickets. This session provides a broader look at tools and features that support work outside the primary workflow.

TEMPLATES: BEST PRACTICES

Learn how templates can streamline order entry and support a more consistent workflow. This session will demonstrate how to apply, create, and manage templates while reinforcing the importance of setup decisions.

UNDERSTANDING WORKFLOW QUEUES

This session reviews how workflow queues are designed to support order management and daily workflow movement. Learners will explore queue usage, queue management, STAT order considerations, and ways to transition current processes into queue-based workflows.

CARETEND BI: OPERATIONAL REPORTING

This session focuses on operational reports that help teams monitor data quality, queues, quantities, aging balances, and workflow-related components. Learners will review how reports can support health checks and improve visibility into daily operations.

CARETEND BI: FINANCIAL REPORTING PART 1 & 2

Review reporting practices that support your month-end close process, including pre-close reports and inventory-related reporting. Learn how to use WellSky CareTend BI to complete your financial review and audit preparation. Part 2 will continue the conversation, allowing more time to answer your questions and review recommendations.