

2026 A&D Summit Sessions

- A&D Session 1
 - **Date/Time:** Tuesday, April 28th 10:00 AM CST
 - **Topic:** A&D Workflows & Process Analysis
 - **Description:** This session is intended to provide an overview and guidance for identifying operational workflows and processes with examples from common business units and how to effectively optimize the use of the Aging & Disability solution.
 - **Presenter(s):** Jeff Benjamin

- A&D Session 2
 - **Date/Time:** Tuesday, April 28th 11:00 AM CST
 - **Topic:** Risk Analysis
 - **Description:** Learn to identify common risk areas in this session to help mitigate problem areas with a detailed analysis of Hardware, Software, Data, People, and Procedures.
 - **Presenter(s):** Jeff Benjamin

- A&D Session 3
 - **Date/Time:** Tuesday, April 28th 1:00 PM CST
 - **Topic:** Data Usage Analysis
 - **Description:** Join this session for a look at common ways to analyze the data entered in the Aging & Disability solution for effective management of the table configuration to meet data entry and reporting needs.
 - **Presenter(s):** Jeff Benjamin

- A&D Session 4
 - **Date/Time:** Tuesday, April 28th 2:15 PM CST
 - **Topic:** Technical Services Client Case Study
 - **Description:** Discover how aging and disability programs efficiently manage service wait lists and prioritize support for those with the highest needs. This session demonstrates how assessments identify risk factors like nutrition, social isolation, and access to services, enabling agencies to plan, improve transparency, and make informed decisions. Following the client presentation, learn how the WellSky Tech Services team partnered with the client to create a custom solution that displays these assessment indicators directly on the client's main demographic page. This collaborative approach helps ensure fair, consistent, and timely access to care for individuals relying on these programs.
 - **Presenter(s):** Kyle Martin & Dick Harmon

- A&D Session 5
 - **Date/Time:** Wednesday, April 29th 9:00 AM CST
 - **Topic:** Client Feedback Spotlight Session - Rosters
 - **Description:** Based on feedback from attendees, this session will provide a detailed look at Rosters including an overview of the different styles of rosters that can be created, roster definition attributes & filtering, and common troubleshooting examples.
 - **Presenter(s):** Jeff Benjamin

- A&D Session 6
 - **Date/Time:** Wednesday, April 29th 10:00 AM CST
 - **Topic:** What's Included in Next Gen A&D: Current Enhancements Overview
 - **Description:** This session provides an overview of enhancements included in the Next Gen A&D experience. Attendees will learn more about updates and changes, along with context on how they relate to current A&D functionality.
 - **Presenter(s):** Taylor Bellus and Kevin Dusenbury

- A&D Session 7
 - **Date/Time:** Wednesday, April 29th 11:00 AM CST
 - **Topic:** Next Gen A&D Focus Group: Shaping the Future Experience
 - **Description:** Join an interactive, in-person discussion focused on the Next Gen A&D experience with the WellSky Solutions team. This session will provide an opportunity to share perspectives, ask questions, and discuss priorities and considerations as we continue planning for what's ahead. Attendee input will help inform ongoing conversations and future planning efforts.
 - **Presenter(s):** Taylor Bellus and Kevin Dusenbury

- A&D Session 8
 - **Date/Time:** Wednesday, April 29th 1:00 PM CST
 - **Topic:** Documentation Best Practices
 - **Description:** From onboarding new users to outlining specific job-related functions, this session covers best practices for documenting user guides, training manuals, and job aids for effective learning practices in Aging & Disability.
 - **Presenter(s):** Jeff Benjamin

- A&D Session 9
 - **Date/Time:** Wednesday, April 29th 2:00 PM CST
 - **Topic:** WellSky Training Center Demonstration
 - **Description:** Sometimes onboarding and getting new users up to speed can be overwhelming. The WellSky Training Center is WellSky's solution for training end users, whether they are experienced or brand new! This session will walk you through an overview of the Learning Management System as well as demonstrate the A&D Onboarding course.
 - **Presenter(s):** Deveron Phillips

- A&D Session 10
 - **Date/Time:** Wednesday, April 29th 2:45 PM CST
 - **Topic:** A&D Q&A Session
 - **Description:** Join this open Q&A session with our expert team from WellSky Professional Services and Solutions to provide additional details and answer questions for information covered during the A&D Training Summit.
 - **Presenter(s):** Jeff Benjamin, Kevin Dusenbury, Kyle Martin, Deveron Phillips

Advanced Reporting Sessions

- Adv. Reporting Session 1
 - **Date/Time:** Tuesday, April 28th 10:00 AM CST
 - **Topic:** Advanced Reporting 101
 - **Description:** If you're new to Advanced Reporting, returning after a while, or would just like a refresher, then this first session is for you. We will provide a high-level walkthrough of Advanced Reporting, which will serve as a bedrock for all of the knowledge to come.
 - **Presenter(s):** Brian Smith

- Adv. Reporting Session 2
 - **Date/Time:** Tuesday, April 28th 11:00 AM CST
 - **Topic:** Filters and Parameters
 - **Description:** Reports aren't just supposed to return data; they're supposed to return the right data. In Session 2, we'll learn about how to apply filters to your reports, to make sure the data you see is the data you want.
 - **Presenter(s):** Brian Smith

- Adv. Reporting Session 3
 - **Date/Time:** Tuesday, April 28th 1:00 PM CST
 - **Topic:** Grouping
 - **Description:** Grouping and Aggregates go hand-in-hand and are how we format our data to answer important questions. How many Service Deliveries did you make? How many clients were those deliveries for? When was the most recent assessment for each client? In Session 3, we'll demonstrate how we can Group our data to get these answers and more.
 - **Presenter(s):** Brian Smith

- Adv. Reporting Session 4
 - **Date/Time:** Tuesday, April 28th 2:15 PM CST
 - **Topic:** Joins and Expressions
 - **Description:** In our final session for the first day, we'll discuss how to use joins to bring together multiple tables in our Advanced Reporting database into a cohesive dataset.
 - **Presenter(s):** Brian Smith

- Adv. Reporting Session 5
 - **Date/Time:** Wednesday, April 29th 9:00 AM CST
 - **Topic:** Adv. Reporting Q&A Part I
 - **Description:** For our second day's sessions, we'll be moving to workshop style discussions. In this open forum, we'll field specific reporting questions from you and walk through how to best implement solutions. In between those questions, we'll continue to add features to our report(s) from day 1, build net new reports, and explore as many topics of Advanced Reporting as we can.
 - **Presenter(s):** Brian Smith

- Adv. Reporting Session 6
 - **Date/Time:** Wednesday, April 29th 10:00 AM CST
 - **Topic:** Adv. Reporting Q&A Part II
 - **Description:** Open session of questions and answers guided by feedback given on the Feedback form on the event page.
 - **Presenter(s):** Brian Smith

- Adv. Reporting Session 7
 - **Date/Time:** Wednesday, April 29th 11:00 AM CST
 - **Topic:** Adv. Reporting Q&A Part III
 - **Description:** Open session of questions and answers guided by feedback given on the Feedback form on the event page.
 - **Presenter(s):** Brian Smith

- Adv. Reporting Session 8
 - **Date/Time:** Wednesday, April 29th 1:00 PM CST
 - **Topic:** Adv. Reporting Q&A Part IV
 - **Description:** Open session of questions and answers guided by feedback given on the Feedback form on the event page.
 - **Presenter(s):** Brian Smith

- Adv. Reporting Session 9
 - **Date/Time:** Wednesday, April 29th 2:00 PM CST
 - **Topic:** Adv. Reporting Q&A Part V
 - **Description:** Open session of questions and answers guided by feedback given on the Feedback form on the event page.
 - **Presenter(s):** Brian Smith