

A background image showing a close-up of two business professionals in a meeting. One person's hands are clasped on a table, while another person's hand is near a laptop. The scene is dimly lit with a blue and green color palette.

# Enhance the power of your software with WellSky's team of solution experts

Your WellSky software is built to drive efficiency, visibility, and compliance. With **WellSky Services**, our solution experts help you maximize those benefits. WellSky offers three categories of services to fit your needs.

**Advisory Services** connect your team with industry experts who are passionate about improving the quality, productivity, and efficiency of your operation. We work with over 300 area agencies on aging (AAAs) and numerous state entities across the country. We share that experience with you through operational assessments that can enhance both your use of the software and the performance of your organization.

**Professional Services** offer you a wide range of opportunities to get more from your WellSky Aging & Disability system. Look to us for data migrations, integrations, workflow enhancements, and other special projects. We can also provide custom training sessions that help your team use the system according to best practices.

**Outsourced Services** eliminate disruptions to your everyday operations. Our team streamlines system administration and ongoing application management, enabling your team to focus on its core mission.

The WellSky Services team understands both your software and your business. We're ready to hit the ground running the moment we start. Learn more about how this range of services can keep your agency running smoothly.



# WellSky Advisory Services

WellSky is the leading authority on issues affecting Area Agencies on Aging (AAAs), State Units on Aging (SUAs), and many other human services organizations. Our advisory services can help you identify opportunities and implement changes that are often difficult to achieve from inside.

## Operational assessments

Operational Assessments provide an opportunity to review your current system setup against your expectations and needs. Call on us to review your system configuration and observe the system in use.

WellSky will conduct interviews with key managers and users to fully understand your needs. Then WellSky will issue an assessment report covering:

- **Business workflow:** enhancing service, efficiency, or effectiveness
- **System satisfaction:** identify areas that may need further attention
- **Information:** improving quality, timing, or usage of available data
- **Outcomes:** measures to validate performance and track progress
- **Configuration:** “quick hits” to fine-tune and optimize application settings

- **User experience:** ideas to support future adoption and proficiency
- **Business process:** help establish or refine internal change and issue management processes.

Based on this report, you will work with WellSky to develop an enhancement plan. Then a WellSky solution expert will work with your system administrator(s) to implement quick-win changes, as well as workflow enhancements discovered during the assessment. You maintain complete control of the process to fit your timeline and budget.

## Organizational consulting

From solving specific issues to assessing your entire organization, our experts will work to customize a pragmatic approach that fits your needs and budget.

Talk to us about a problem or challenge you are facing. We work with over 300 AAAs across the country, so the odds are we’ve seen your problem before and can propose a proven solution. Our plans help you raise efficiency, enhance quality of services, and boost provider satisfaction.





# WellSky Professional Services

When your agency needs help to complete a special project or enhancement, WellSky can provide a wide range of services to get the job done. Here are some of the ways our services team can help your agency run smarter and get more from your Aging & Disability (A&D) system.

## Solution deployment

Your WellSky system is highly configurable to support the way you work. We work with over 300 AAAs across the country and can draw on that experience to help you plan and deploy your software to ensure success. Establish workflows that enhance your agency's productivity and data collection tools that sharpen your insights.

## Technical services

If your data quality is less than ideal, it can slow down everyone in your organization. WellSky can solve this problem with several different services.

**Data migration, replication, and validation.** We can convert data from other sources for use in A&D, or clean up your data that may be inconsistent, incomplete, or duplicative. WellSky can also develop data scripts that run automatically as new entries are made, requiring correct inputs or standardizing the data entered.

**Integration and customization.** Enhance your software to share data with your partners' systems or adapt WellSky Aging & Disability to support unique

services your agency provides that require distinct workflows.

**Custom reports and analytics.** Strengthen your understanding and decision-making with reports that pull data from your system precisely the way you need it. WellSky empowers you to portray your community's needs visually to leaders, funders, and potential partners.

## Learning services

WellSky can equip your staff in a variety of ways to get the most from your system.

**Training.** We can customize an introductory training program around your entire A&D system, or teach staff the proper way to use a specific module or workflow process. Training can occur on-site or online and will be designed to meet the specific needs of your system administrators, power users, or entire provider network.

**Collateral.** WellSky can also develop training manuals or aids to simplify future training and ensure best practices. This is ideal when your organization has not had recent formal training, if there has been significant turnover, or if you have made changes to workflows or business processes.

**Events.** WellSky's annual "Aging & Disability Boot Camp" brings together AAA administrators and power users from across the country. It's a great opportunity to gain advanced skills on the system, while networking with peers.



# WellSky Outsourced Services

WellSky's expertise helps you tackle ongoing challenges that disrupt everyday operations. Our knowledgeable team streamlines your back-office and technological processes, helping your organization run more efficiently and enabling your team to focus on serving your community.

## Application management services

Many WellSky clients appreciate the continuous process improvement and peace of mind they gain with a monthly service engagement. You can address specific pain points or optimize your system by redesigning business processes, implementing the use of new features across your organization, customizing assessment forms, and more.

When you sign up, a WellSky consultant will meet with you regularly to identify enhancement projects and manage your agreed-upon services hours. Your account manager can draw from many WellSky experts and resources to complete a wide range of your projects. Your work is carefully managed, so you always know you're on budget. Common application management services include:

**User provisioning and management.** WellSky solution experts will assist customers with their user site management, ensuring each user is provisioned correctly. They also triage application issues reported by users, from password resets to software defects.

**Configuration changes.** WellSky solution experts will assist you with configuration change requests from your business units. These can include updates to security and access role configuration, assessment

forms, rosters and route configuration, report definitions, workflow triggers, status and reason codes and other miscellaneous settings, tools, and utilities.

**Customer-specific tasks.** WellSky can develop advanced reports, custom interfaces, or even training guides or job aids. Our System Administration packages include one operational assessment and one managed upgrade each year, in addition to managing challenges that arise as your processes shift, reporting requirements change, or new opportunities arise.

**System administration.** We act as a virtual system administrator, to help with a go-live transition, fill in knowledge transfer gaps when you have a change in staff, or take on everyday tasks during busy reporting months or when key resources are expected to have competing priorities.

## Upgrades

As new features are added to the system, WellSky can customize these capabilities to help you get the most from them. We can also help you adapt any custom configurations that may be affected by the upgrade.

## Managed Content Configuration Services (MCCS)

If you need a unique assessment form to support your work, WellSky can easily build a form that takes into account your specific use case and needs. We also develop custom indicators or algorithms for assessments. This equips your providers with built-in logic that helps determine eligibility, complete complex assessments, or lock in compliance.



**Learn more!** Contact your WellSky account manager for more information on any of our services.

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