

CareForum 2022

The WellSky® Conference

Solution Roadmap: WellSky Hospice & Palliative

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VP Solution Management

9/13/2022

The WellSky team



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Revenue Cycle Management



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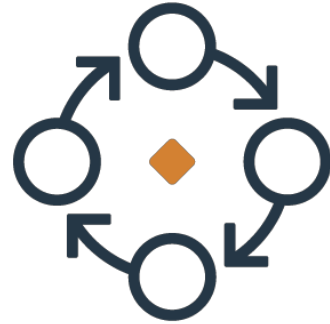
Director, Solution Management
Applied Insights



Zac Davis

Solution Manager
Business Intelligence

Four key challenges defining the future of home-based care



1

**Finding & keeping
great staff**

Your Opportunity
**Create a competitive
advantage in staffing**

2

**Driving operational
excellence**

Your Opportunity
**Increase & scale
operational efficiency**

3

**Improving quality of
end-of-life care**

Your Opportunity
**Outperform market in
quality ratings**

4

**Expanding referral &
payer relationships**

Your Opportunity
**Grow your census &
revenue**

WellSky Hospice & Palliative

Web-Based | Data-Driven
Care-Focused | ONC-Certified

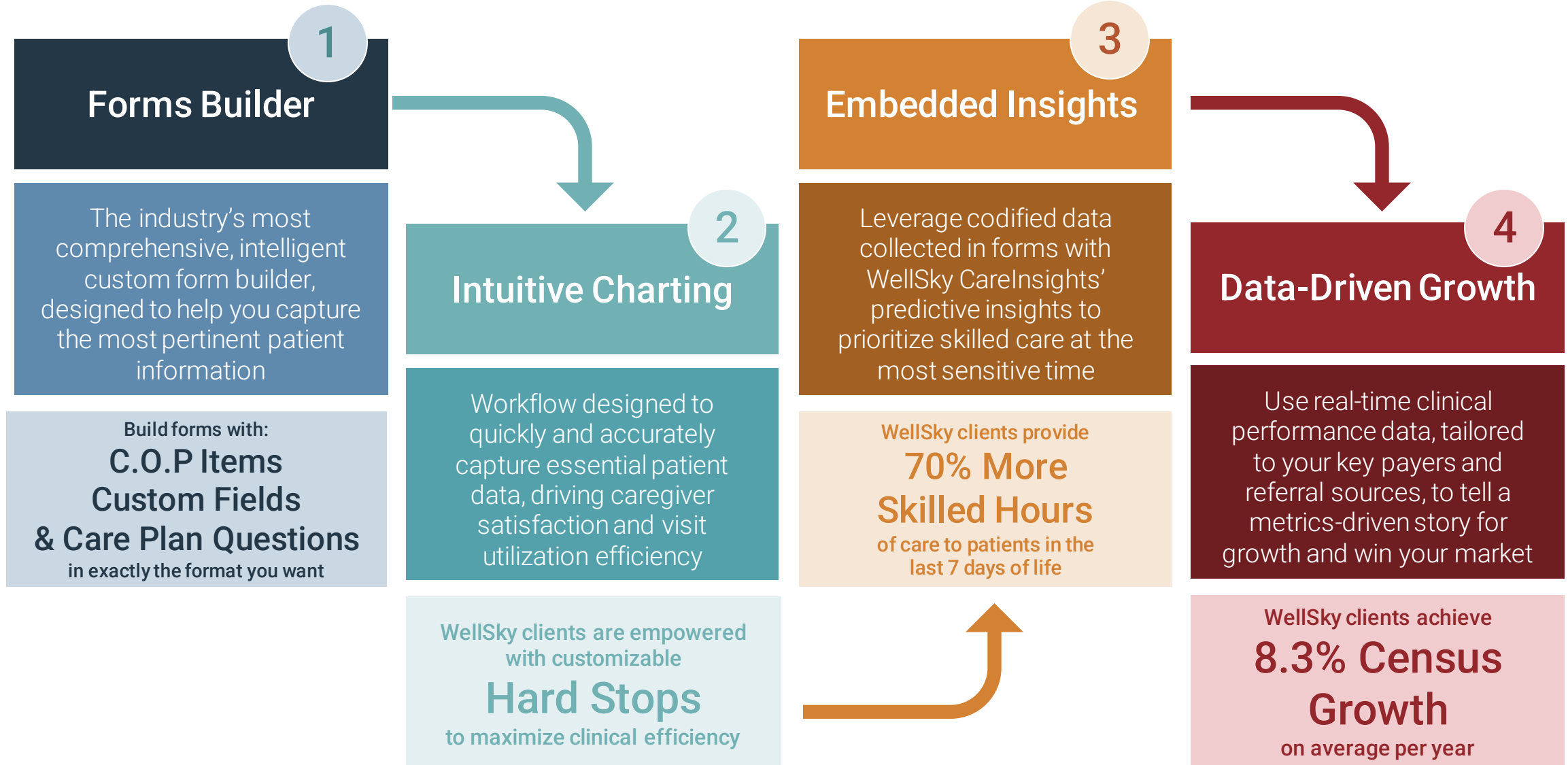
- ✓ Intuitive workflows and connectivity
- ✓ Customizable documentation and hard stops
- ✓ Patient-centric intake and scheduling
- ✓ Comprehensive clinical charting
- ✓ Real-time, integrated, predictive analytics
- ✓ Centralized financial management and reporting



WellSky Hospice & Palliative meets the requirements of advanced payment models and 2015 Certified EHR Technology (CEHRT) designation

WellSky Hospice & Palliative's Unique Charting Capabilities

Collecting The Right Data Efficiently Drives Better Outcomes & Growth





Hospice & Palliative Roadmap 12 Month Priorities

Clinical and Operational Efficiency

- CareInsights for Hospice
- Resource Manager Integration
 - Demographics, Scheduling, Mileage
- E-Signature with drafts, multiple signatures, and PDFs
- Medications – Sliding Scale
- Interdisciplinary Group Enhancements (incl. Palliative)
- Hospice Care Index
- Addendums

Revenue Cycle Management

- Billing/Claims Coding Que (Palliative)
- Billable Code Updates (Palliative)

Data and Analytics

- Data Warehouse Extract – Snowflake
- Business Intelligence – Sisense
- Value-Based Insights
- Google Cloud migration
- TapCloud

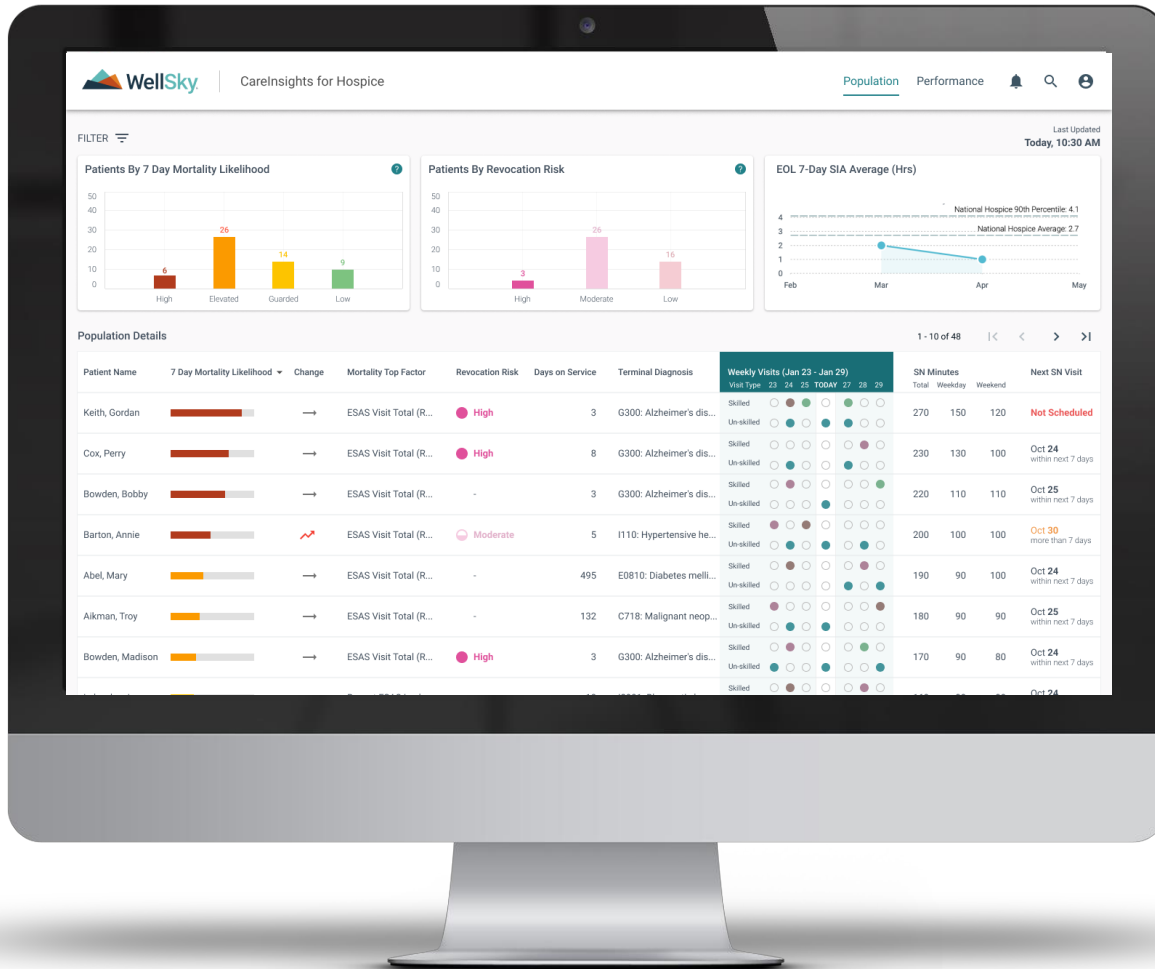
Regulatory

- CEHRT Real World Testing
- CEHRT Cures Updates
- FHIR Standards with Patient Viewer
- ICD10 Updates

Clinical and Operational Efficiency

WellSky CareInsights for Hospice: Provide smarter end-of-life care to more patients with fewer resources

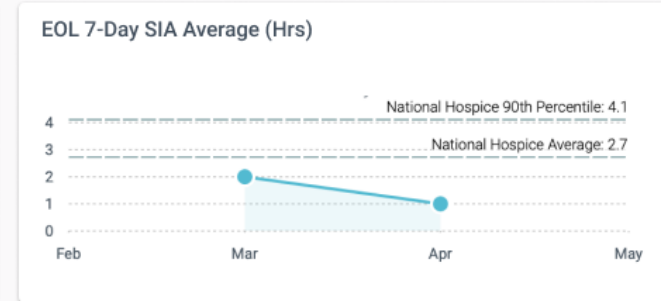
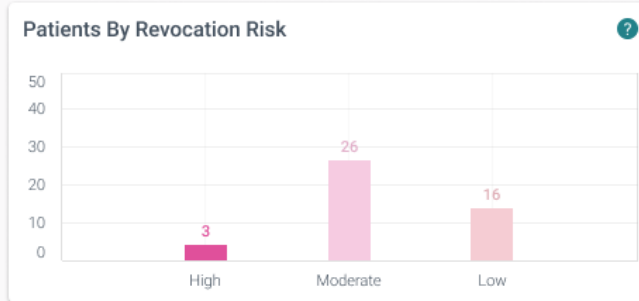
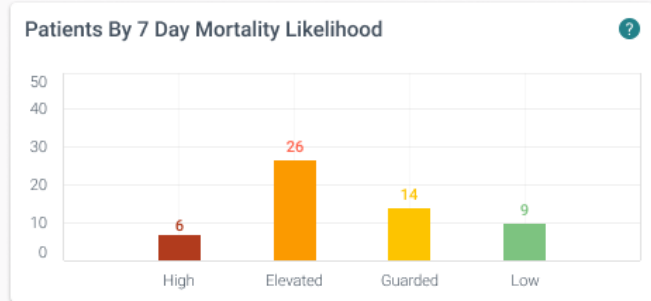
Now Live and Available!



- ◆ Real-Time Patient 7-Day Mortality Algorithm
- ◆ Patient Insights for Identifying Trends
- ◆ Live Discharge Risk Algorithm
- ◆ Configurable Risk Alerting
- ◆ Population View for Managing Risk
- ◆ Integration into Core Patient Chart

Agencies using CareInsights for Hospice provide **70%** more skilled hours in the last 7 days of life & have a **30%** longer length of stay

FILTER



WELLSKY'S APPROACH

Predictive insights to prioritize skilled care at the most sensitive time

Population Details

1 - 10 of 48

Patient Name	7 Day Mortality Likelihood	Change	Mortality Top Factor	Revocation Risk	Days on Service	Terminal Diagnosis	Weekly Visits (Jan 23 - Jan 29)							SN Minutes			Next SN Visit				
							Visit Type	23	24	25	TODAY	27	28	29	Total	Weekday		Weekend			
Keith, Gordan	<div style="width: 60%; background-color: #c00000;"></div>	→	ESAS Visit Total (R...	High	3	G300: Alzheimer's dis...	Skilled	○	●	○	○	○	○	○	○	○	○	270	150	120	Not Scheduled
Cox, Perry	<div style="width: 60%; background-color: #c00000;"></div>	→	ESAS Visit Total (R...	High	8	G300: Alzheimer's dis...	Skilled	○	○	○	○	○	○	○	○	○	○	230	130	100	Oct 24 within next 7 days
Bowden, Bobby	<div style="width: 60%; background-color: #c00000;"></div>	→	ESAS Visit Total (R...	-	3	G300: Alzheimer's dis...	Skilled	○	○	○	○	○	○	○	○	○	○	220	110	110	Oct 25 within next 7 days
Barton, Annie	<div style="width: 60%; background-color: #c00000;"></div>	↗	ESAS Visit Total (R...	Moderate	5	I110: Hypertensive hea...	Skilled	○	○	○	○	○	○	○	○	○	○	200	100	100	Oct 30 more than 7 days
Abel, Mary	<div style="width: 40%; background-color: #ffc000;"></div>	→	ESAS Visit Total (R...	-	495	E0810: Diabetes melli...	Skilled	○	○	○	○	○	○	○	○	○	○	190	90	100	Oct 24 within next 7 days
Aikman, Troy	<div style="width: 40%; background-color: #ffc000;"></div>	→	ESAS Visit Total (R...	-	132	C718: Malignant neop...	Skilled	○	○	○	○	○	○	○	○	○	○	180	90	90	Oct 25 within next 7 days
Bowden, Madison	<div style="width: 40%; background-color: #ffc000;"></div>	→	ESAS Visit Total (R...	High	3	G300: Alzheimer's dis...	Skilled	○	○	○	○	○	○	○	○	○	○	170	90	80	Oct 24 within next 7 days
Recent ESAS Lack...				-	10	I0981: Rheumatic hea...	Skilled	○	○	○	○	○	○	○	○	○	○	160	80	80	Oct 24 within next 7 days
ESAS Visit Total (R...				-	8	I0981: Rheumatic hear...	Skilled	○	○	○	○	○	○	○	○	○	○	150	80	70	Oct 24 within next 7 days
Recent ESAS Lack...				Moderate	5	I110: Hypertensive hea...	Skilled	○	○	○	○	○	○	○	○	○	○	140	80	60	Nov 01 more than 7 days

Solution showcase
CareInsights for Hospice

TapCloud: Patient & family engagement designed for home-based care

Whole Family Engagement



Continuous
Monitoring
AI/ML

Care Team Insight and Action

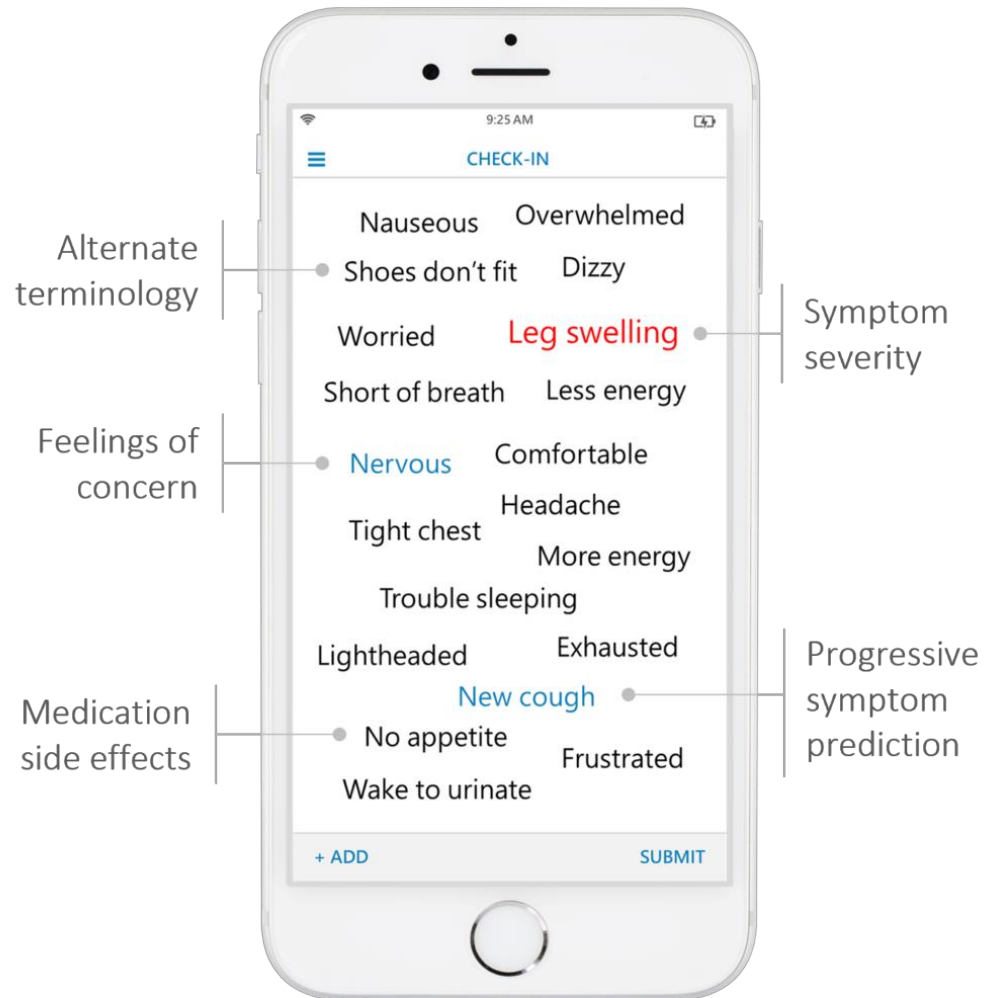
Patient Prioritization

Actionable Insights

Treatment Efficacy

TapCloud

Connect the dots – drive outcomes



- **Check in** with patients between clinical visits and capture symptoms through a patient-specific word cloud symptom tracker
- **Quickly identify when patients are in need** with real-time insights that enable you to deploy care interventions to reduce preventable hospital readmissions
- **Keep patients, their loved ones, and the care team connected** with daily care reminders and secure communication, video visits, and messaging

New updates coming in October!
CarePort connection now LIVE

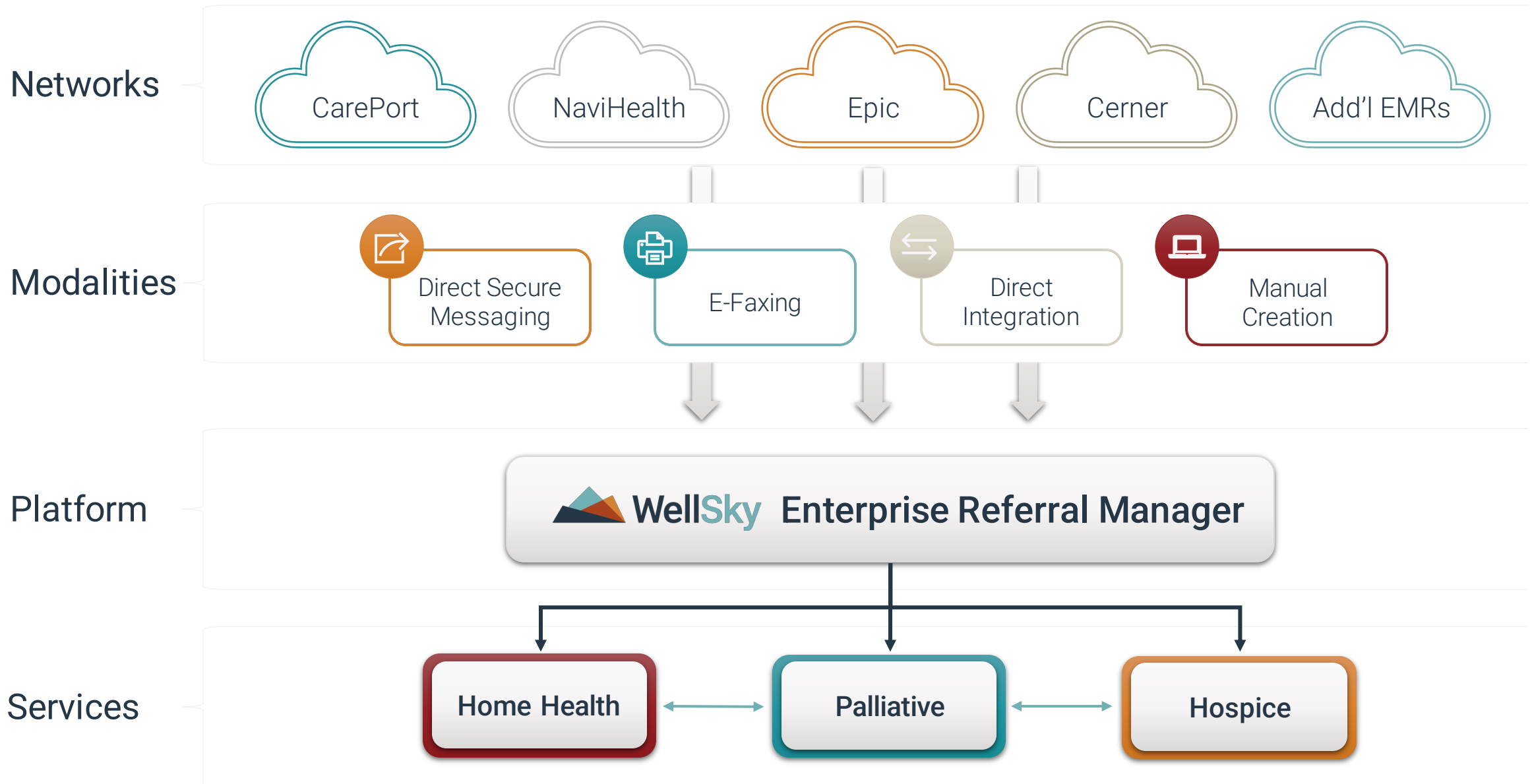
WellSky Enterprise Referral Manager

Empowers agencies to manage inbound referrals and customer relationships within a single, unified experience across all roles and service lines.

The screenshot displays the WellSky Enterprise Referral Manager interface. At the top, the navigation bar includes 'WellSky | Enterprise Referral Manager' and menu items: REFERRAL INBOX, ACTIVITY, DAILY PLAN, ACCOUNTS, CONTACTS, PATIENTS, and ADMIN. A notification bell icon with a red '5' is visible. Below the navigation bar, the page title is 'Referral for Addison, Betty' with a birth date of 'Dec 15, 1959' and an 'EDIT PATIENT INFO' link. Action buttons for 'CANCEL REFERRAL' and 'DELETE REFERRAL' are present. A progress bar indicates the 'REFERRAL STATUS: IN PROGRESS'. On the left, a 'Care Navigation' sidebar shows five steps: 'Select EMR' (checked), 'Review / Upload Documents' (checked), 'Patient Information' (not checked), 'Referral Information' (not checked), and 'Activate to EMR' (not checked). The main content area is titled 'Documents' and contains a table with columns: Name, Format, Source, Type, Date Uploaded, and actions. Two documents are listed: 'Hospice Admission Packet' (Manual Upload, Admit Paperwork) and 'Allegiance Hospice Referral Form' (CarePort). Below the table is a dashed box for uploading files with instructions: 'Drag and drop images, videos or documents or browse file on your computer' and 'Max File Size 20 mb'. At the bottom of the main area are 'BACK' and 'SAVE & NEXT' buttons. The footer contains the text 'ACME Palliative, Acme Home Health, Consolo Demo, ACME Hospice, test11' and '© 2022 WellSky ben.myers@wellsky.com'.

Name	Format	Source	Type	Date Uploaded	Actions
Hospice Admission Packet	.pdf	Manual Upload	Admit Paperwork	Jul 13, 2022, 10:00 AM	Download, Edit, Delete
Allegiance Hospice Referral Form	.pdf	CarePort		Jul 13, 2022, 10:00 AM	Download, Edit, Delete

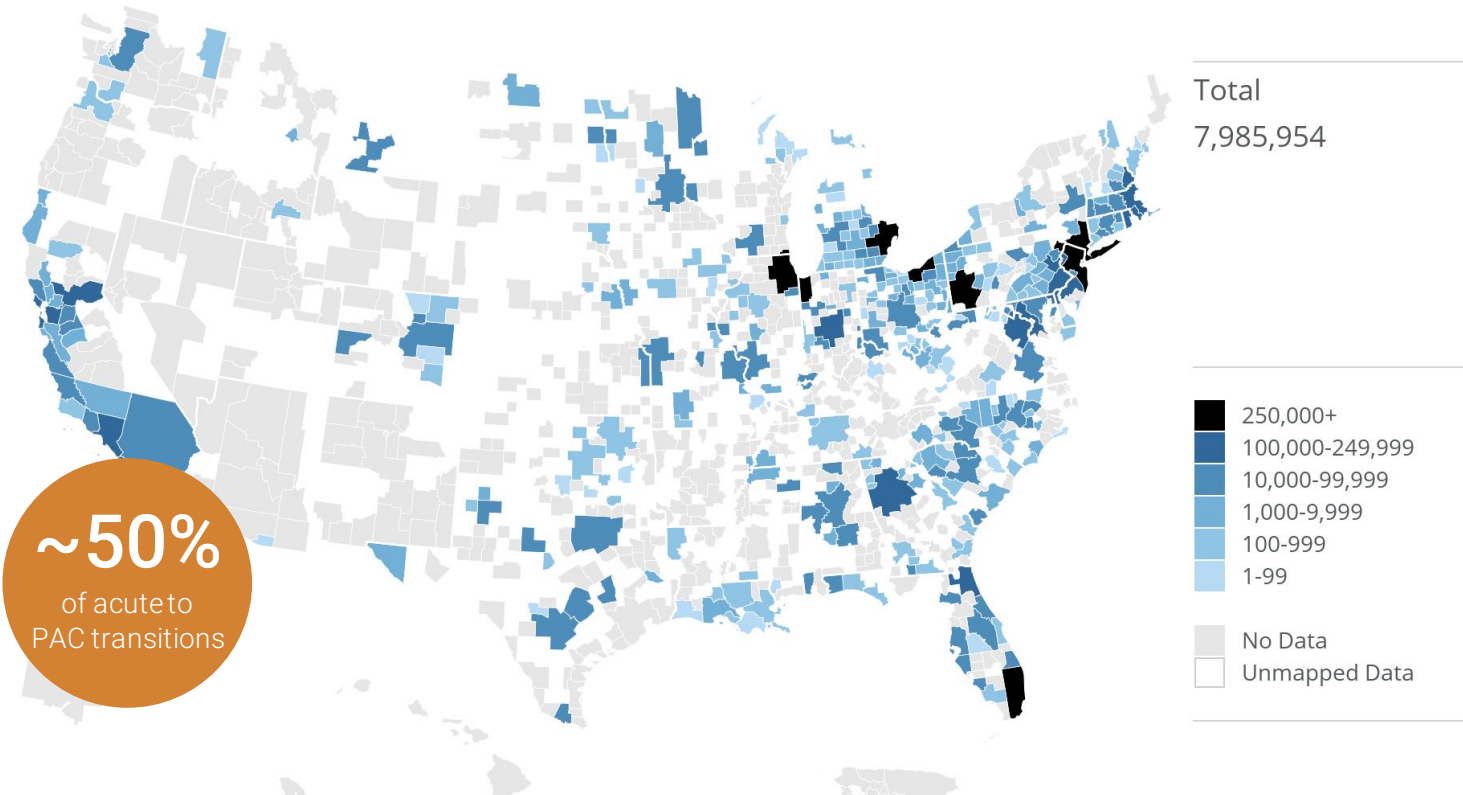
Manage your network of referral sources directly into a central inbox



WellSky Network: PAC Discharge

Proprietary connectivity with CarePort, the #1 PAC discharge platform

~8M unique hospital discharges per year; 2,000 hospitals



CarePort total discharges by provider MSA (12-month snapshot)



Lightning-fast response to referrals



Direct communication with referral source



Automated patient data transfer



Closed-loop outcomes & real-time risk reporting between hospital & post-acute

Centralized referral source connections

New updates
coming in October!

The screenshot displays the WellSky Enterprise Referral Manager interface. At the top, there is a navigation bar with tabs for REFERRAL INBOX, ACTIVITY, DAILY PLAN, ACCOUNTS, CONTACTS, PATIENTS, and ADMIN. Below the navigation bar, there is a section for 'Providing Care' with an 'Inbox' tab selected. A search bar labeled 'Select a Region' and a 'Reset Filters' button are present. The main content is a table with the following columns: Date Received, Patient Name, Patient DOB, Source, Sender, Expected Service, Status, Referral Details, and Actions. The table contains five rows of referral data, all with a status of 'In Progress'. At the bottom of the interface, there is a footer with the text 'Coastal Hospice Care, Coastal Palliative Care, CSG Home Health' and a copyright notice '© 2022 WellSky charles.kleinheksel@wellsky.com'.

Date Received	Patient Name	Patient DOB	Source	Sender	Expected Service	Status	Referral Details	Actions
01/21/2022 09:28 AM	Wince, Ron	2/3/1945	Enterprise Referral Manager	ABC Hospital	Coastal Hospice Care	In Progress	Referral Sender Docs	⋮
01/11/2022 11:38 PM	Smith, Jim	1/11/2022	Enterprise Referral Manager	HOSCoastalMidlands	Coastal Hospice Care	In Progress	Referral Sender Docs	⋮
01/11/2022 11:35 PM	Everest, Allison	1/1/1933	Enterprise Referral Manager	ABC Hospital	Coastal Palliative Care	In Progress	Referral Sender Docs	⋮
01/11/2022 11:35 PM	Smithy, Dave	1/1/1933	Enterprise Referral Manager	ABC Family Practice	Coastal Palliative Care	In Progress	Referral Sender Docs	⋮
01/11/2022 11:35 PM	Ferguson, Gene	6/24/1938	Enterprise Referral Manager	Coastal Clinic	Coastal Palliative Care	In Progress	Referral Sender Docs	⋮

Benefits

Expanded Referral Opportunities

Simplified Agency Reporting

Efficient Referral Management

- Connections to community partners for digital exchange of referral data
- Proprietary connectivity with CarePort organizations for seamless referral routing
- Consolidation of all inbound and agency-created referrals
- Creation of a single, longitudinal record of referral activities



EMR integration & service line coordination

New updates coming in October!

The screenshot displays the WellSky Enterprise Referral Manager interface. At the top, there are navigation tabs: REFERRAL INBOX, ACTIVITY, DAILY PLAN, ACCOUNTS, CONTACTS, PATIENTS, and ADMIN. The main content area is divided into several sections:

- Patient Profile:** Shows "Jackson, Margaret" with a "Patient Enabled" toggle. A "VIEW REFERRALS" button is present for "Multiple Active Referrals".
- Demographics:** A table with columns: Name, SSN, DOB, Gender. Data: Jackson, Margaret, 656-66-6667, 07/14/1960, Female.
- Patient Questions:** A table with columns: Question, Responses, Other Response, Date, Recorded By. Data:

Question	Responses	Other Response	Date	Recorded By
Where are you currently living?	Alone	N/A	7/21/22, 11:21 AM	Vairagi, Siddhesh
Feedback for us:	Met Expectations	N/A	7/21/22, 11:21 AM	Vairagi, Siddhesh
- Recent Activity:** Shows "Mandan Ranu" with a "Phone Call" tag and "test" notes, "a month ago".
- Referral History:** Shows two referrals: "Demo Hospice" (ADMITTED) and "Consolo Demo 2" (ACTIVATED). Each entry includes effective, created, activated, and admitted dates.

Benefits

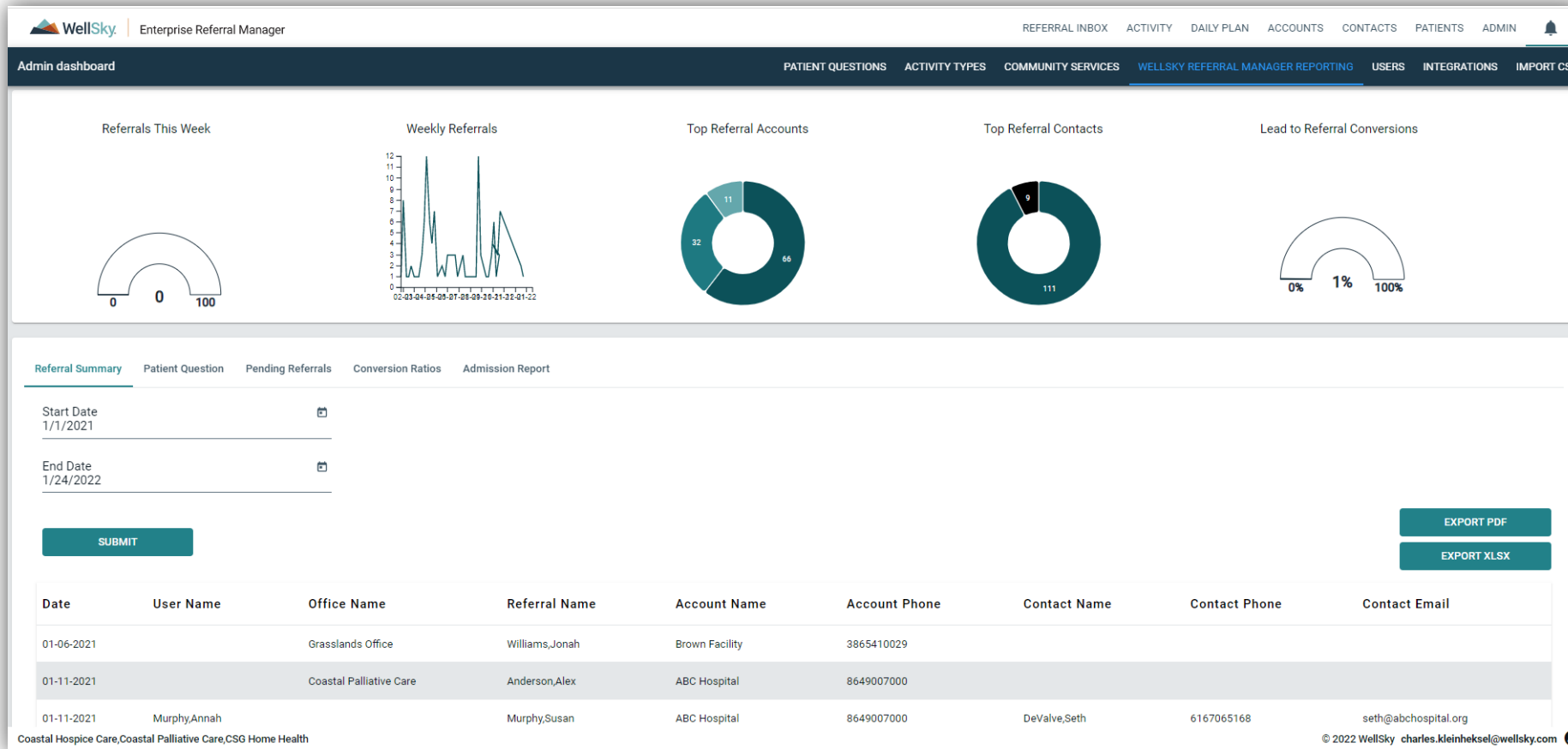
Reduced Workflow Redundancy

Patient Care Optimization

More Informed Care Delivery

- Simplified creation of new patient records within the WellSky EMR based on existing referral data
- Seamless patient transitions across service lines based on current health status and clinical needs
- Complete, contextualized patient data to better inform care delivery

Referral marketing management



Benefits

Lead Tracking Efficiency

Marketing Performance Visibility

Referral Network Effectiveness

- Alignment of intake and CRM activities within a single system with cross-role visibility
- Tracking of community liaison contact activities and management of marketing objectives
- Insights into referral partner network performance and lead generation trends

Coming early 2023

WellSky Resource Manager

Drives efficiency for providers to use one platform for all resource and patient management including scheduling, time and attendance, and labor management.

Resource Scheduling
Kathy Earl, OT

Domain: Southeast

MY SCHEDULE | ALL RESOURCES

VIEW: Day | Week | Month

01/26/2021 - 02/01/2021

Available visits

OT Eval, Jan 30

OT Eval, Jan 31

To do

Metrics

PRODUCTIVITY (WK)

79%
TARGET: 80%

TOTALS

- 9 total patients
- 3 evals
- 1 discharge
- 26 projected miles traveled

	Sun Jan 26	Mon Jan 27	Tue Jan 28	Wed Jan 29	Thu Jan 30	Fri Jan 31	Sat Feb 1
09:45 A		OT Routine Betty Addison 3x/wk for 3 wks 120 W Elm Ln Springfield, MO 65619	OT Eval Kianna Pham 54 E Maple Ln Springfield, MO 65619	OT Routine Betty Addison 3x/wk for 3 wks 120 W Elm Ln Springfield, MO 65619	OT Routine Heath Atwood 2x/wk for 3 wks 14 S Finley Rd Springfield, MO 65619	OT Routine Betty Addison 3x/wk for 3 wks 120 W Elm Ln Springfield, MO 65619	
10:00				Travel 6.6mi - est. 23m			
10:15		Travel 6mi - est. 15m			Travel 2.5mi - est. 8m	OT Eval Casey Thornton	
10:30		OT Eval David Chavez 30 Main St Springfield, MO 65618		OT Routine Vera Hare 3x/wk for 3 wks 10 E 10th St Strafford, MO 65717	OT Routine Drew Cano 2x/wk for 3 wks 88 N Finley Rd Springfield, MO 65619		
10:45			Travel 3mi - est. 10m				
11:00			OT Routine Heath Atwood 2x/wk for 3 wks 14 S Finley Rd Springfield, MO 65619	Travel 10mi - est. 20m	Travel 3.6mi - est. 10m	10 Middle Way Springfield, MO 65619	
11:15				OT Routine Vera Hare 3x/wk for 3 wks 10 E 10th St Strafford, MO 65717	OT Discharge Deanna Hodges 123 S Carter St Springfield, MO 65618		
11:30		Travel 3.6mi - est. 10m				Travel 10mi - est. 20m	
11:45		OT Eval Kianna Pham	Travel 3.6mi - est. 10m	10 E 10th St Strafford, MO 65717	123 S Carter St Springfield, MO 65618	OT Routine Vera Hare 3x/wk for 3 wks 10 E 10th St Strafford, MO 65717	
12:00 P			OT Routine Drew Cano 2x/wk for 3 wks 88 N Finley Rd Springfield, MO 65619	Travel 10mi - est. 20m	OT Eval Phillip Miller	Travel 2.5mi - est. 8m	
12:15							
12:30							
12:45							
01:00							
01:15							
01:30							
01:45							
02:00				OT Routine Zane Mayes		OT Routine Zane Mayes	

Enterprise scheduling capabilities that optimize staff and compliance for patient care

Resource Scheduling
Kathy Earl, OT

Domain: Southeast

MY SCHEDULE | ALL RESOURCES

VIEW: Day | **Week** | Month

01/26/2021 – 02/01/2021

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01:00		OT Eval Kianna Pham	Travel 3.6mi – est. 10m		OT Routine Drew Cano 2x/wk for 3 wks 88 N Finley Rd Springfield, MO 65619	OT Routine Vera Hare 3x/wk for 3 wks 10 E 10th St Strafford, MO 65717	
01:15							
01:30			OT Routine Drew Cano 2x/wk for 3 wks 88 N Finley Rd Springfield, MO 65619	Travel 10mi – est. 20m	OT Eval Phillip Miller	Travel 2.5mi – est. 8m	
01:45							
02:00				OT Routine Zane Mayes		OT Routine Zane Mayes	

WellSky Mobile

CHECK IN | TIME & TRAVEL | SCF

Betty Addison | **OT Routine**

120 W Elm Ln
Springfield, MO 65619

(606) 222-1212

Fri 1/31/21 | 9:45 AM – 10:30 AM

Location last obtained 9:45 AM

7 35
8 40
9 45 AM
10 50 PM
11 55

- View scheduled visits
- Accept new assignments
- Mobile app capabilities

Tools to optimize and manage labor at scale

Coming early 2023

Optimize: Resource productivity
Kathy Earl, OT

VIEW PERIOD: Day, Week, Month, Quarter, Custom (01/26/2021 - 02/01/2021)

Productivity

- My productivity: 79% (Target: 80%)
- Site productivity: 76% (Target: 80%)

Schedule activity

- 16% open
- 66% scheduled
- 13% complete
- 5% missed

Productivity	Resource	Resource type	Credentials	Status	Total available hours	Total prod. value
79%	Earl, K.	Occ Therapy	OT	Full Time	8	6.32
Date: 01/31/2020						
	Productivity	Available hours	Total productivity value			
	79%	8	6.32			
Appointment Time	Duration (min)	Productivity value	Schedule activity category			

- View resource productivity
- Insights on organizational performance & productivity
- Labor management metrics

Labor Management
Allan Smith

VIEW PERIOD: Day, Week, Month, Quarter, Custom (Friday, July 31, 2020)

Hourly-resource costs for today (5% OVER BUDGET (\$7560))

SHOW: All resource types | SORT BY: Lowest to highest cost

RESOURCE	TYPE	HRS	EMP	CNS RATE	COST	PRODUCTIVITY
Holland, V.	SLP	8	FT	5%	\$820	90%
Fox, K.	OT	8	FT	8%	\$860	77%
Tucker, T.	PT	8	FT	3%	\$940	93%
Hidalgo, I.	OT	8	FT	4%	\$1045	97%
Smith, T.	OT	4	PRN	12%	\$1100	65%
Banks, M.	OT	8	PRN	8%	\$1105	78%
Rice, R.	Nrsng	6	PT	8%	\$1150	68%
Martin, S.	OT	10	FT	4%	\$1200	95%

Resource cost and productivity

Kevin Fox: OT | Full time, 75% productivity, Cost for this period: \$870

Costs vs. labor budget

LABOR BUDGET	TOTAL COST	COST TO BUDGET
\$7,200	\$7,560	105%

Labor vs. revenue

REVENUE	LABOR % OF REVENUE
\$22,680	33%

Costs and revenue this week

Line chart showing COST (blue) and REVENUE (light blue) from Mon to Sat. Revenue is consistently higher than cost.

Medication Sliding Scale for ease of dosing

In Beta
Coming late September!

Add New Medication

Food and environmental allergens are only screened if they are a component part of a medication. Please check the product being dispensed to ensure the allergen is not part of the product or packaging since this is not screened by this allergy system. *The screened allergy information is intended to supplement medications. This information is advisory only and is not intended to replace sound clinical judgement in the delivery of h

Medication

Medication

Filter for Medi-Span catalogue only

Filter for Formulary catalogue only

Dosage Information

Date Ordered* 01/01/2021 Ordering Prescriber*

Dosage Amount Low* Dosage Amount High* Dosage Unit*

Per Glucose Scale

Route of Admin* Sliding Scale Low Dose

Primary Icd10 Covered Covered Information

Dosage Frequency

Sliding Scale Anti-Infective As Needed

Discontinued Date* Course of Therapy

Quantity Refills

Glucose Scale

Blood Sugar	Dose
60 - 110	No Insulin
111 - 150	2 Units
151 - 200	4 Units
201 - 250	6 Units
251 - 300	8 Units
301 - 350	10 Units
> 350	12 Units ▲ Call the Physician and give the units.

Medication

Ativan 0.25 tab every 12 hours ORAL (0.25 mg Tablet) **Consult**

Dosage Information

Date Ordered 04/23/2012 Ordering Prescriber Bell, Doctor H

Dosage Amount Low 0 Dosage Amount High 0 Dosage Unit Solution

Route of Admin Subcutaneous Sliding Scale Low Dose

Frequency 1 - 2 tabs every 6 hours ORAL As Needed Pain/Temp (325 MG Tablet) Reasons Pain/Temp Pain Medication Yes

Covered Yes Pharmacy Hope (TX) Open Order No

Glucose Scale

Blood Sugar	Dose
60 - 110	No Insulin
111 - 150	2 Units
151 - 200	4 Units
201 - 250	6 Units
251 - 300	8 Units
301 - 350	10 Units
> 350	12 Units ▲ Call the Physician and give the units.

- Updates on Medications, Favorites, and EMAR
- Physician set Sliding Scale
- Reduces steps to administer medication

Interdisciplinary Group Updates for Improved Usability

Coming early 2023

Dashboard > Search Patients > Adams, Scarlett > IDG Comprehensive Assessments > Edit

IDG Comprehensive Assessment [Adams, Scarlett](#) 01/01/22




Mortality Likelihood : **High** Revocation Likelihood : **Moderate**

Current IDG Chart

IDG Comprehensive Assessment + NEW TASK

Active 12/15/2021 12/01/2021 11/15/2021 11/01/2021

Details

Effective Date  Next IDG Date  IDG Meeting Notes 

Send to Patient Portal when signed Auto Fax when signed

Bereavement Assessment discussed (if deceased)

Yes No

Recertification discussed (if recertifying)

Yes No

- Added to Palliative
- Updated User Interface
- Incorporation of CareInsights Mortality and Revocation Likelihood
- View who participated in every IDG meeting
- Easily record who is participating in current IDG meeting

Interdisciplinary Group Updates

Improved IDG Documentation Recording

Coming early 2023

The 'Create a Task' dialog box features a title bar with a close button (X). It includes two date selection fields: 'Effective Date*' and 'Due Date*', each with a calendar icon. Below these is a search bar labeled 'Assigned To'. A large text area for 'Task description' is positioned below the search bar. At the bottom right, there are 'CANCEL' and 'CREATE' buttons.

Embedded Task and
Signature Options

The 'Fax IDG Comprehensive Assessment' dialog box has a title bar with a close button (X). It starts with a 'Select a Recipient *' label. Below this is a list of checkboxes for recipient types: 'All', 'DME Provider: Town & Country MedicaTown', 'Funeral Home: ABC Funeral Home - Toms River', 'Pharmacy: One Point', 'Primary Physician: Seehorn, Joana', and 'Facility: ABC Skilled nursing facility'. A text area for 'Additional Instructions' is located below the list. At the bottom right, there are 'CANCEL' and 'FAX' buttons.

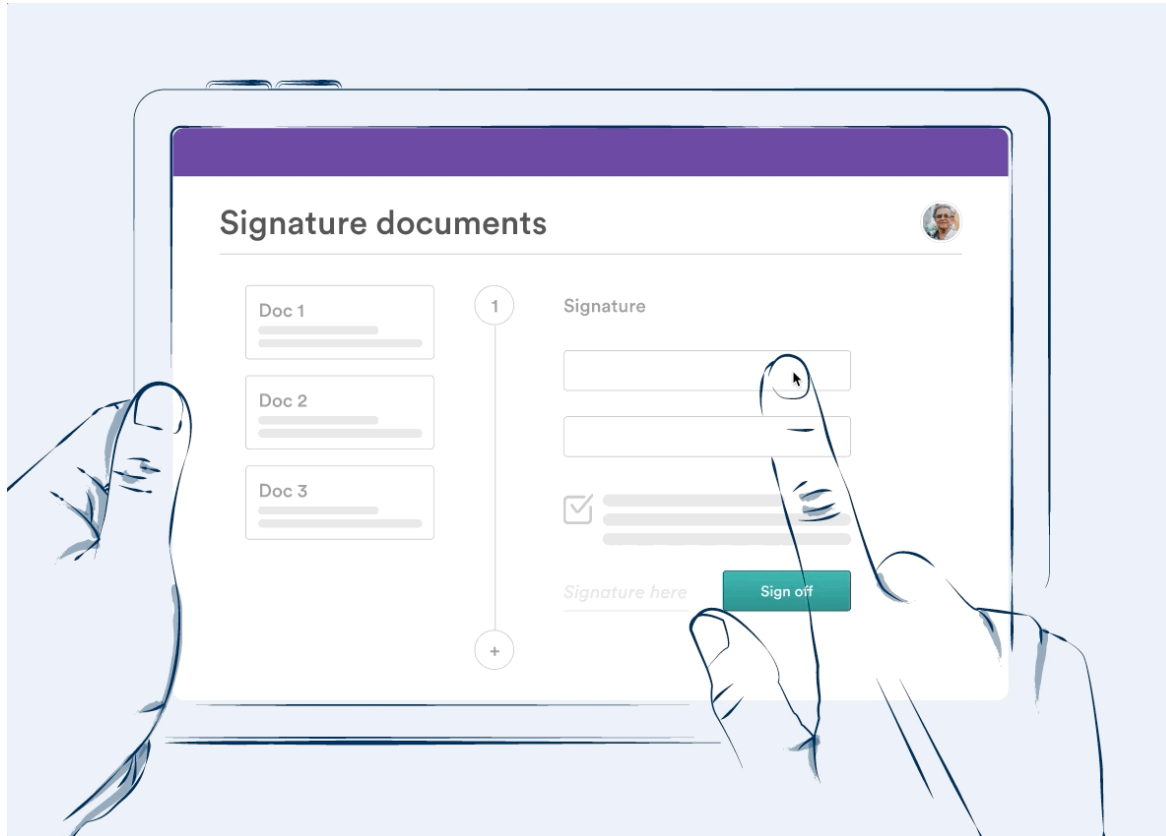
Added External Faxing
Selections

The 'Print Certification' dialog box features a title bar with a close button (X). It includes an 'Include:' section with checkboxes for 'All', 'Use Office for Cover Sheet (not Corporation)', 'Electronic Visit Verification', 'Footer Signature Lines', 'User Times', 'Last Page Signature Line', and 'Allergies'. Below this is a section for 'Drug Interactions/Adverse Effects Signature:' with checkboxes for 'RPH' and 'Physician'. At the bottom right, there are 'CANCEL' and 'PRINT' buttons.

Improved Printing
Selections

eSignature with DocuSign

Coming early 2023



- Built into templates and workflows
- Collect one or more signatures
- Save drafts
- Convert to PDF when ready
- Saves to patient record

Revenue Cycle Management

Palliative – Provider Code Entry

In Beta
Coming late September!

- Improves provider efficiency by allowing CPT and Dx code entry as part of the clinical charting process.
- Automatically filters for supported and contracted codes.
- User has ability to customize code descriptions to help guide provider search.
- Additional value driver for integrated clinical to billing solution

The screenshot displays a clinical charting interface for a patient named Aabulla, Ansley. The interface includes a sidebar with navigation options like 'General Details', 'Chief Complaint', and 'History of Present Illness (HPI)'. The main content area shows 'General Details' with fields for 'Patient Information', 'Time of Visit (CDT)', 'Discipline', 'Owner', and 'Encounter Type'. A 'Billable Code' dropdown menu is open on the right, showing a search bar and a list of codes including '1122234', '77777: test rev code', '90001: Test code', and '99203: Office/outpatient visit, ne...'. The interface also features a 'Care Plan Problems' section with an 'ADD' button and a 'Visit Frequency (Unavailable offline)' table.

Discipline	Assigned Person	Start Date	End Date	Visit Frequency	PRN Frequency	Missing	Count
RN	Kindred, Angela	2022-07-17	2022-07-23	1 visit(s) Weekly	2 PRN visit(s) every 7 day(s)	1	0

Coding Queue

Coming Spring 2023

- Aggregate scheduled visits to audit for corresponding charts, coding, and claims
- Review chart highlights and edit HCPCS/CPT/DX codes as necessary
- Update coding status, assignee, and follow up notes
- Track claim status and work denials and ADR requests

The screenshot displays the WellSky A/R Dashboard with the 'Coding' tab selected. The dashboard shows a summary of coding items: All (1200), QA (500), Awaiting Audit/Audit (300), Billed (350), and Denied (50). A table lists individual coding items with columns for date, provider, payer, assignee, tag, follow-up date, and follow-up status. A 'BULK ACTIONS' menu is open, showing options like 'Edit Follow Up Dates', 'Edit Tags', 'Edit Assignee', 'Mark as Sent', and 'Submit Claims'. The table data is as follows:

		Provider	Payer	Assignee	Tag	Follow Up	Follow Up status	
		Scarlett	Humble, Kevin	VA Fee Basis Program	John, Farrel	Telephone Call	09/12/2021 10:00	Expired
		Del, Albert	Shawn, Lora	Aspen bcbs RB	Humble, Kevin	Tag 2	02/15/2021 10:00	Not selected
		s Abigail	Shawn, Lora	Medicare Part A	John, Farrel	Telephone Call	01/30/2021	Expired
<input type="checkbox"/>	01/30/2021	Anderson, Travis	Humble, Kevin	Blumana	Sara, Collins	Denials	01/23/2021	Not selected
<input checked="" type="checkbox"/>	01/15/2021	Anderson, Travis	Shawn, Lora	Medicare Part A	Cody, Travis	Telephone Call	01/15/2021	Expired
<input checked="" type="checkbox"/>	01/03/2021	Antons, Payton	Larson, Shelby	Medicare Part B	Bryant, Jeff	Denials	01/03/2021	In progress
<input type="checkbox"/>	01/03/2021	Apple, Ann	Bryant, Jeff	Blumana	Cody, Travis	Telephone Call	01/03/2021	Expired
<input type="checkbox"/>	01/03/2021	Armstrong, Annie	Bryant, Jeff	Medicare Part B	Humble, Kevin	Telephone Call	01/03/2021	In progress
<input type="checkbox"/>	01/03/2021	Arrondale, Elsa	Barnett, Sara	Medicare Part B	John, Farrel	Telephone Call	01/03/2021	In progress

Billing Enhancements

- Set your billable codes by office to ensure accurate rates across different locations/regions
 - Target release in October
- Batch create secondary claims from claim summary screen
 - Targeted for November
- Setting to prevent denial codes from adjusting a claim balance
 - Targeted for December
- Improvements to patient responsibility detail populated from eligibility requests
 - Targeted for winter 2022-2023
- Improvements to commercial ERA posting
 - Targeted for winter 2022-2023

AR Dashboard enhancements

- Eligibility responses populate back on the patient chart
- User auto-assignment of pre-bill and AR worklists by payer and office
- NEW denials management tab based on chosen CARC and RARC codes

Claims Total Est. Amount: \$8,922.49

Ready (3)
Warnings (0)
Errors (285)
Rejected (0)
Sent (3)

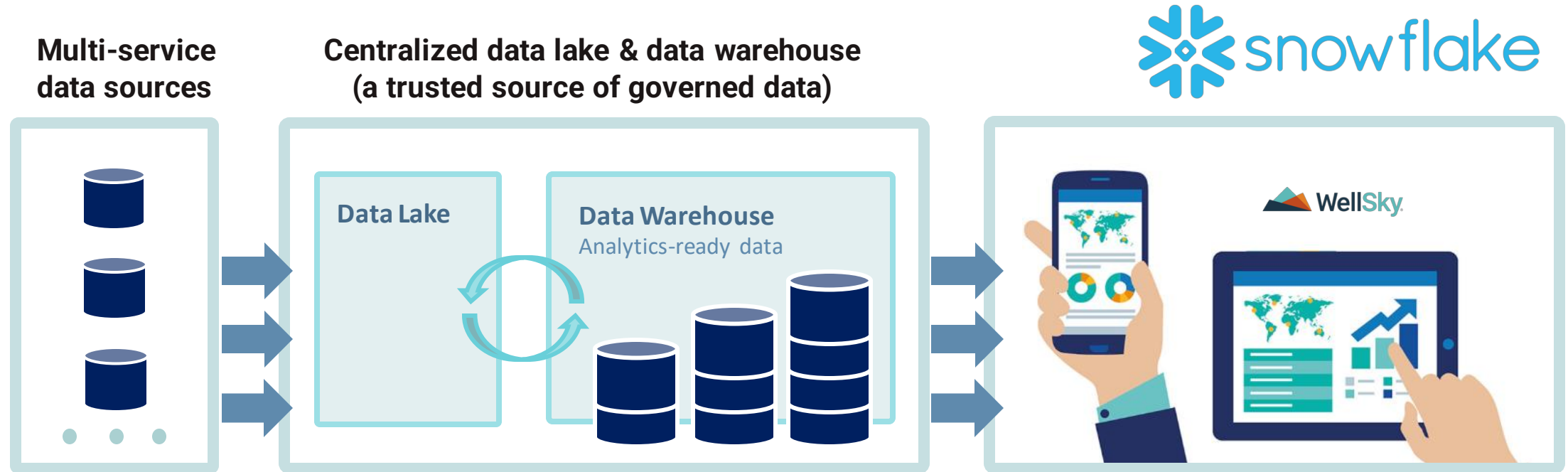
<input type="checkbox"/>	START DATE	END DATE	NAME ↑	TYPE	PAYER	EST. AMOUNT	ASSIGNEE	TAG	FOLLOWUP
<input type="checkbox"/>	07/01/2022	07/26/2022	Abbut, Happy	813	Private or Self Pay	\$5,087.36	Larson, Emily		
<input type="checkbox"/>	07/01/2022	07/07/2022	Abbut, Happy	813	Private or Self Pay	\$1,369.67	Larson, Emily		
<input type="checkbox"/>	05/17/2017	05/31/2017	Pappy, Happy	812	Medicare Part A	\$2,465.46			

Items per page: 50 ▼ 1 - 3 of 3 < >

Data and Analytics

Direct Data Access to your data through Snowflake

Now Available



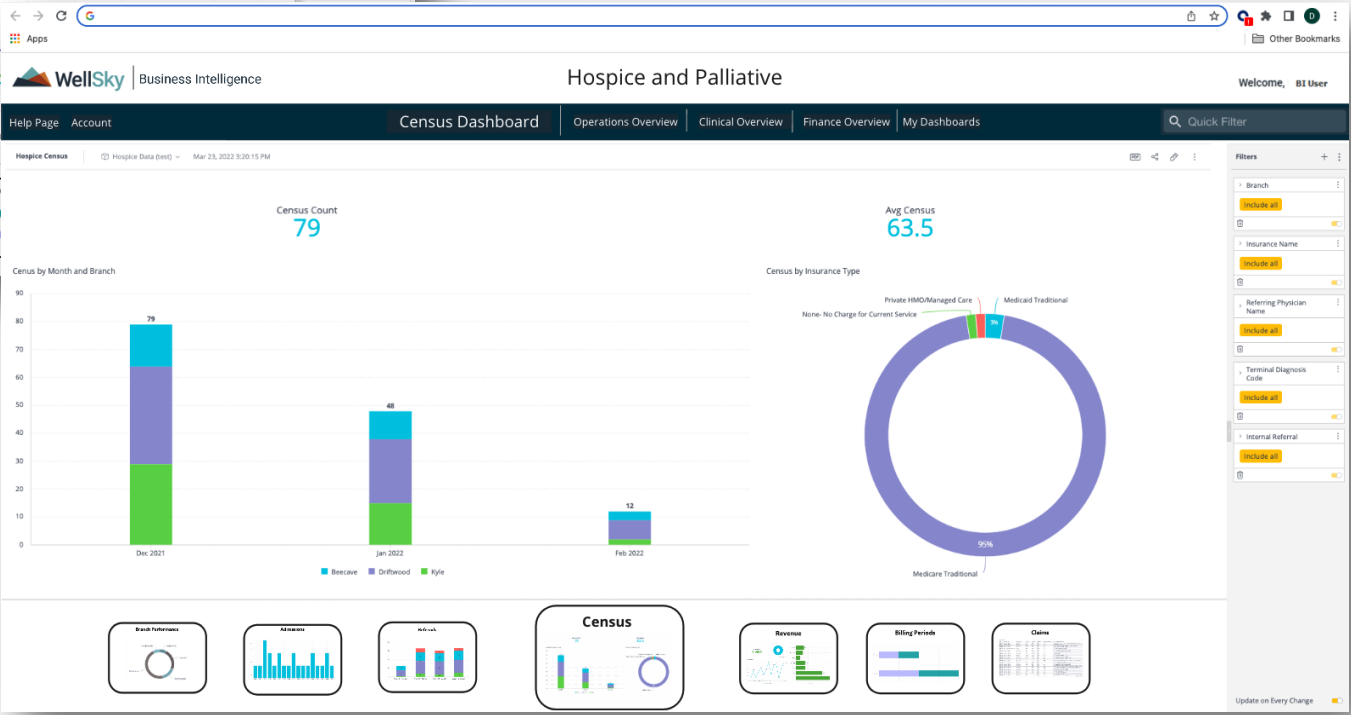
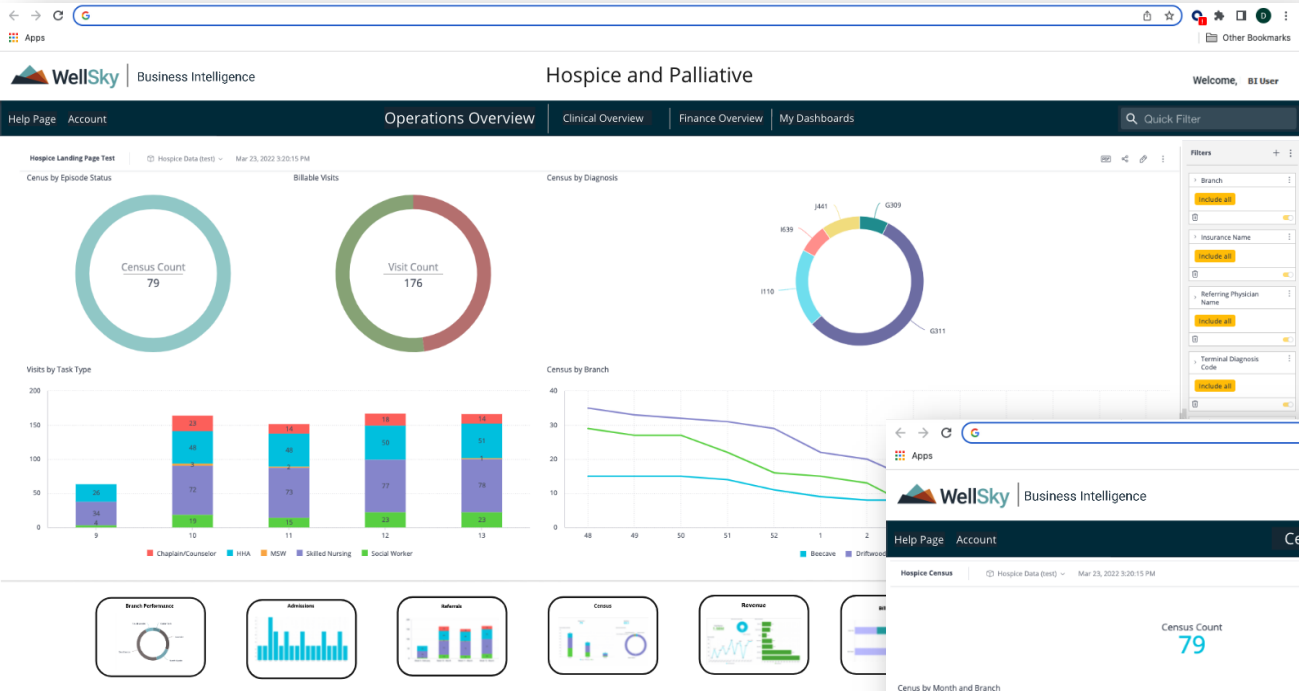
Key Capabilities

- Near Real-time insights
- Agile data delivery (efficient process and flexible enterprise-grade tools)
- Faster processing and delivery of data

Upcoming new Business Intelligence Reporting

Coming 2023

- Visualizations using Sisense
- Modernized navigation and functionality
- Unlimited no-cost user licensing



- Report customization
- Drill down
- Benchmarking

CareForum 2022

The WellSky® Conference

Thank you.

Contact us:

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VP Solution Management

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Request a consultation today!

