

# CareForum 2022

The WellSky® Conference

## Solution Roadmap: WellSky Home Health

Michelle Justiss

VP Solution Management

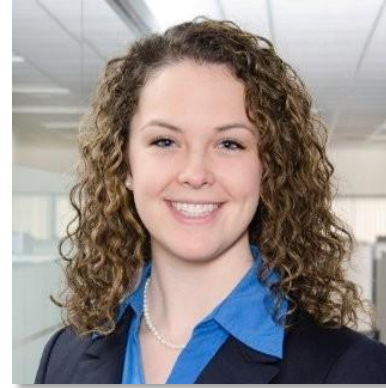
9/13/2022

# The WellSky team



**Michelle Justiss**

Vice President, Solutions Management  
*Home Health & Hospice*



**Emily Larson**

Director, Solutions Management  
Revenue Cycle Management



**Anthony Trosky**

Director, Solutions Management  
*Operations*



**Zac Davis**

Solutions Manager  
*Business Intelligence*

# Four key challenges you must address to succeed in the next decade in healthcare...



1

Challenge #1  
**Finding & keeping  
great staff**

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

2

Challenge #2  
**Delivering  
improved patient  
outcomes**

Your Opportunity  
**Outperform market  
in quality ratings**

3

Challenge #3  
**Driving operational  
excellence**

Your Opportunity  
**Increase & scale  
operational  
efficiency**

4

Challenge #4  
**Expanding referral &  
payer relationships**

Your Opportunity  
**Grow your census &  
revenue**



## Home Health and Roadmap 12 Month Priorities

### Clinical and Operational Efficiency

- Referral Manager Integration
  - Demographics, Scheduling, Mileage
- Enterprise Referral Manager & Referral Import
- Clinical Quality Checks
- SSO/Okta/MFA
- Support Hub

### Data and Analytics

- New Data Extract -Snowflake
- TeamInsights
- TapCloud

### Revenue Cycle Management

- Medicare Secondary
- Global Payer Management
- Patient Ledger
- Remittance Management

### Regulatory

- Oasis E
- Electronic Visit Verification

# Clinical and Operational Efficiency

# OASIS E

Target Release January 2023  
Formset available to clients early October

As finalized in the CY 2022 **Home Health** Rule, CMS will implement **OASIS E** on January 1, 2023

## OASIS-E Start of Care: Weston, Joan (345)

Table of Contents

Patient Tracking	Assessed/Saved
Administrative	Assessed/Saved
Vitals	Assessed/Saved
Patient History and Diagnosis	Assessed/Saved
Hearing, Speech, and Vision	Not Started
Cognitive, Mood, and Behavior	Not Started
Preferences for Customary Routine Activities	Not Started
Environment Conditions	Not Started
Functional Status	Not Started
Functional Abilities and Goals	Not Started
Bladder and Bowel	Not Started
Active Diagnosis	Not Started
Health Conditions	Not Started
Swallowing/Nutritional Status	Not Started
Skin Conditions	Not Started
Medications	Not Started
Special Treatments, Procedures, and Programs	Not Started
Supplies	Not Started
Orders for Disciplines and Treatments	Not Started

OASIS Check has not been run.

Submit

Return to clinician for signature:

## What's New


New Look and Layouts

Reduced Unnecessary Documentation  
(Procedure Codes, Inpatient Diagnosis)

Improved Skip Pattern Logic  
(M1306, M1311, BIMS, N0415)

Added Quality Checks  
and More to come into 2023!

# New Enhanced Psych Status, New Colors and Iconography

**Mental Status** 



<p><b>Orientation</b></p> <p><input type="checkbox"/> Oriented (Person, Time, Place and Situation)</p> <p>Deficits noted in:</p> <p><input type="checkbox"/> Person   <input type="checkbox"/> Time</p> <p><input type="checkbox"/> Place   <input type="checkbox"/> Situation</p>	<p><b>Memory</b></p> <p><input type="checkbox"/> No problems</p> <p><input type="checkbox"/> Forgetful   <input type="checkbox"/> Short-term loss</p> <p><input type="checkbox"/> Misplaces objects   <input type="checkbox"/> Long-term loss</p>	<p><b>Neurological</b></p> <p><input type="checkbox"/> No problems</p> <p><input type="checkbox"/> Seizures   <input type="checkbox"/> Spasms</p> <p><input type="checkbox"/> Asphasic   <input type="checkbox"/> Tremors</p> <p><input type="checkbox"/> Headaches</p>
<p><b>Mood</b></p> <p><input type="checkbox"/> Appropriate (WNL)   <input type="checkbox"/> Apathetic</p> <p><input type="checkbox"/> Depressed   <input type="checkbox"/> Agitated</p> <p><input type="checkbox"/> Irritable   <input type="checkbox"/> Anxious</p> <p><input type="checkbox"/> Elated   <input type="checkbox"/> Hostile</p>	<p><b>Behavioral</b></p> <p><input type="checkbox"/> Appropriate (WNL)   <input type="checkbox"/> Inappropriate   <input type="checkbox"/> Indifferent   <input type="checkbox"/> Assaultive</p> <p><input type="checkbox"/> Impaired judgement   <input type="checkbox"/> Impulsive   <input type="checkbox"/> Poor coping skills   <input type="checkbox"/> Compulsive</p> <p><input type="checkbox"/> Evasive   <input type="checkbox"/> Poor decision making</p>	

**Psychosocial:** Document any psychosocial factors related to the patient's relationships, living environment, impacts on the delivery of services or ability to participate in his/her own care

Additional Information

Psychiatric Worksheet

- New icons will indicate relation to reimbursement or plan of care versus pink and green colors.
- Upcoming – Will add additional indicators for items related to value based care, process measures, quality measures, and CoP

**(A1005) Ethnicity**   *(Mark all that apply)*

<input type="checkbox"/> A. No, not of Hispanic, Latino/a, or Spanish Origin	<input type="checkbox"/> D. Yes, Cuban
<input type="checkbox"/> B. Yes, Mexican, Mexican American, Chicano/a	<input type="checkbox"/> E. Yes, Another Hispanic, Latino, or Spanish origin
<input type="checkbox"/> C. Yes, Puerto Rican	<input type="checkbox"/> X. Patient unable to respond

# New Quality Checks

New hard stops configurable at the corporate level

WellSky Corporate Manager

Welcome, Becky White | AMDebug | Log Out

Go To File Edit View Tools Search Help

Administration > Agency Quality Checks > Clinical > OASIS

### Agency Quality Checks

Clinical

OASIS

Audit Log 2

#### Settings [RESET ALL](#)

Select actions to block if the OASIS form contains fatal errors that would result in a rejection if submitted to iQIES

Submit to QA  Approve  Export OASIS files

Set which items are required before signing and submitting the OASIS

All OASIS items and comprehensive assesment required for the Plan of Care

OASIS items only

Custom Select

SECTION NAME	ITEMS
Patient Tracking	<input type="checkbox"/> Select All
Administration	<input checked="" type="checkbox"/> M1033
Vitals	<input checked="" type="checkbox"/> Pain Scale
<u>Health Conditions</u>	<input checked="" type="checkbox"/> J0510
Hearing, Speech, and Vision	<input checked="" type="checkbox"/> J0520
Cognitive Patterns	<input checked="" type="checkbox"/> J0530
Mood	<input checked="" type="checkbox"/> Respiratory Status
Behavior	<input checked="" type="checkbox"/> M1400
Pref. Customary Routine Activities	<input type="checkbox"/> Endocrine Status
Environmental Conditions	<input checked="" type="checkbox"/> Cardiovascular Status
Functional Status	
Functional Abilities and Goals	
Bowel and Bladder	

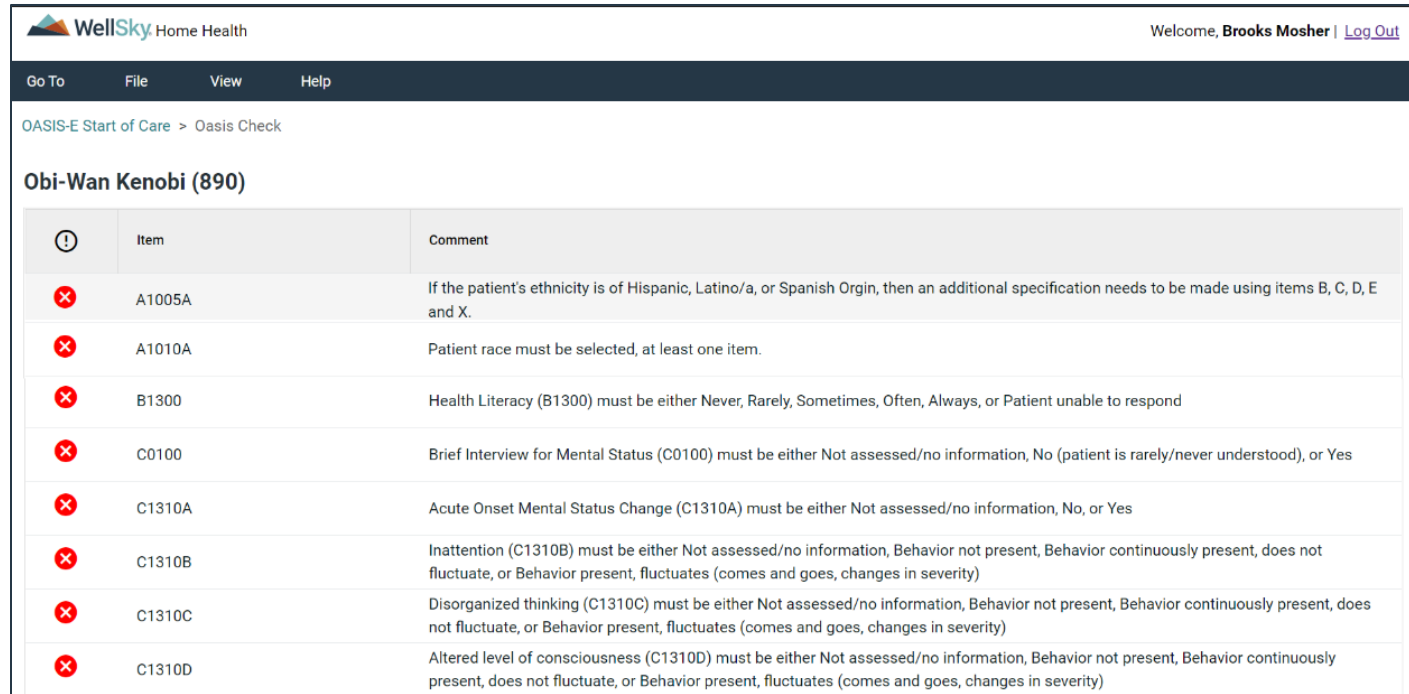
[APPLY CHANGES](#)

In addition to OASIS items, we would have submission hardstops on the major CoP Plan of Care items:

- **Homebound Status**
- **Vitals & Parameter for PO alert**
- Fall Risk Assessment (MAHC)
- Diagnosis Codes
- Mental Status
- Cognitive Status
- Psychosocial Status
- Supplies and DME
- Frequencies
- Prognosis
- Rehab potential
- Functional limitations
- Activities permitted
- Safety Measures
- Risk for emergency visits rehospitalization
- Discharge planning
- Advance directives



# Oasis Check Updates



WellSky Home Health | Welcome, Brooks Mosher | [Log Out](#)

Go To | File | View | Help

OASIS-E Start of Care > OASIS Check

**Obi-Wan Kenobi (890)**

Item	Comment
A1005A	If the patient's ethnicity is of Hispanic, Latino/a, or Spanish Origin, then an additional specification needs to be made using items B, C, D, E and X.
A1010A	Patient race must be selected, at least one item.
B1300	Health Literacy (B1300) must be either Never, Rarely, Sometimes, Often, Always, or Patient unable to respond
C0100	Brief Interview for Mental Status (C0100) must be either Not assessed/no information, No (patient is rarely/never understood), or Yes
C1310A	Acute Onset Mental Status Change (C1310A) must be either Not assessed/no information, No, or Yes
C1310B	Inattention (C1310B) must be either Not assessed/no information, Behavior not present, Behavior continuously present, does not fluctuate, or Behavior present, fluctuates (comes and goes, changes in severity)
C1310C	Disorganized thinking (C1310C) must be either Not assessed/no information, Behavior not present, Behavior continuously present, does not fluctuate, or Behavior present, fluctuates (comes and goes, changes in severity)
C1310D	Altered level of consciousness (C1310D) must be either Not assessed/no information, Behavior not present, Behavior continuously present, does not fluctuate, or Behavior present, fluctuates (comes and goes, changes in severity)

- Errors or warnings rendered into a new UI
- Updated messaging that is more descriptive of the error and what potential change is required.
- Error messages drill down to specific sub-items for larger items.
- **Clicking or pressing the row will bring user back to the specific item instead of the OASIS page generically like the legacy version does.**

# Improved Printing

OASIS-D1 Start of Care	Addison, Betty B
<b>(M0102) Date of Physician-ordered Start of Care (Resumption of Care):</b> If the physician indicated a specific start of care (resumption of care) date when the patient was referred for home health services, record the date specified. 03/30/2022 [Go to M0110, if date entered] <input type="checkbox"/> NA - No Specific SOC date ordered by Physician	
<b>Comments:</b> If the physician indicated a specific start of care (resumption of care) date when the patient was referred for home health services, record the date specified.	
<b>(M0104) Date of Referral:</b> Indicate the date that the written or verbal referral for initiation or resumption of care was received by the HHA. <b>Comments:</b> This is where comments would go.	
<b>(M0110) Episode Timing:</b> Is the Medicare home health payment episode for which this assessment will define a case mix group an 'early' episode or a 'later' episode in the patient's current sequence of adjacent Medicare home health payment episodes? <input checked="" type="radio"/> 1-Early <input type="radio"/> 2-Later <input type="radio"/> UK-Unknown <input type="radio"/> NA-Not Applicable: No medicare case mix group to be defined by this assessment	
<b>(M0140) Race/Ethnicity: (Mark all that apply)</b> <input checked="" type="checkbox"/> 1-American Indian or Alaska Native <input type="checkbox"/> 4-Hispanic or Latino <input type="checkbox"/> 2-Asian <input type="checkbox"/> 5-Native Hawaiian or Pacific Islander <input type="checkbox"/> 3-Black or African American <input type="checkbox"/> 6-White	
<b>(M0150) Current Payment Sources for Home Care: (Mark all that apply)</b> <input type="checkbox"/> 0-None - No charge for current services <input type="checkbox"/> 7 - Other government (for example, TriCare, VA) <input checked="" type="checkbox"/> 1-Medicare (traditional fee-for-service) <input checked="" type="checkbox"/> 8 - Private Insurance <input type="checkbox"/> 2-Medicare (HMO/Managed Care/Advantage plan) <input type="checkbox"/> 9 - Private HMO/managed care <input checked="" type="checkbox"/> 3-Medicaid (traditional fee-for-service) <input type="checkbox"/> 10 - Self-pay <input type="checkbox"/> 4-Medicaid (HMO/Managed Care) <input type="checkbox"/> 11 - Other (specify) <input type="checkbox"/> 5-Worker's compensation <input type="checkbox"/> UK - Unknown <input type="checkbox"/> 6-Title programs (for example, Title III, V, or XX)	

- Faster print rendering
- Improved legibility – no more “addendums” where text overflows to the bottom
- Reduction of extra white space on pages due to no more addendums
- Reduction of page length by 40-50% in some instances saving costs
- Improved OCR for scanning

# Upcoming: New Index Page UI with real-time Oasis Check Warnings

**WellSky** | Welcome, Becky White | AMDebug | Log Out

Go To | File | Edit | View | Tools | Search | Help

OASIS-E Start of Care > Home

**Connor, Sarah**

Branch: SCRANTON | MRN: 54376543 | Episode Date Range: 01/01/2021 - 02/28/2021

**24 REVIEW** | **11 REVIEW**

- OASIS Menu**
  - Patient Tracking
  - Administrative
  - Patient History and Prognosis
  - Hearing, Speech, and Vision
    - Sensory Status
      - B0200: Hearing
      - B1000: Vision
      - B1300: Health Literacy
  - Mood
  - Preferences for Activities
  - Functional Status
  - Functional Abilities
  - Bowel and Bladder
  - Active Diagnosis
- Tools**
  - OASIS Quality Check
  - OASIS Analytics
  - HHRG Worksheet

Category	Description	Status	Warning 1	Warning 2
Administration	Items related to administrative data such as payment source, reason for assessment, PCP, referral info, etc.	Completed	0	0
Patient Tracking	Demographics, M0150, M0090, M0102, M0104, M0110, A1250, M1000, M1005	In Progress	1	0
Vitals	Assess the degree to which individuals have the capacity to obtain, process, and understand health information to make appropriate health decisions	Completed	0	0
Patient History and Prognosis	Assess the degree to which individuals have the capacity to obtain, process, and understand health information to make appropriate health decisions	In Progress	0	0
Hearing, Speech, and Vision	Assess the degree to which individuals have the capacity to obtain, process, and understand health information to make appropriate health decisions	Not Started	0	0
Cognitive Patterns	Assess cognitive functioning including mental status (BIMS), and delirium (CAM)	In Progress	2	0
Mood	Items to identify patient's usual ability with everyday activities, self-care, and mobility	In Progress	2	1
Behavior	Items to identify patient's usual ability with everyday activities, self-care, and mobility	Completed (Has Errors)	2	1
Preferences for Customary Routine activities	Items to identify patient's usual ability with everyday activities, self-care, and mobility	In Progress	4	1
Environment Conditions	Items to identify patient's usual ability with everyday activities, self-care, and mobility	In Progress	0	0
Functional Status	Items to identify patient's usual ability with everyday activities, self-care, and mobility	In Progress	0	0
Functional Abilities and Goals	Items to identify patient's usual ability with everyday activities, self-care, and mobility	In Progress	0	0
Bladder and Bowel	Items to identify patient's usual ability with everyday activities, self-care, and mobility	In Progress	1	0
Active Diagnosis	Items to identify patient's usual ability with everyday activities, self-care, and mobility	In Progress	0	0
Health Conditions	Items to identify patient's usual ability with everyday activities, self-care, and mobility	In Progress	2	1
Swallowing/Nutritional Status	Items to identify patient's usual ability with everyday activities, self-care, and mobility	In Progress	2	1
Skin Conditions	Items to identify patient's usual ability with everyday activities, self-care, and mobility	In Progress	2	1
Medications	Items to identify patient's usual ability with everyday activities, self-care, and mobility	In Progress	2	1
Special Treatments, Procedures, and Programs	Items to identify patient's usual ability with everyday activities, self-care, and mobility	In Progress	2	1
Orders for Disciplines and Treatments	Items to identify patient's usual ability with everyday activities, self-care, and mobility	In Progress	2	1

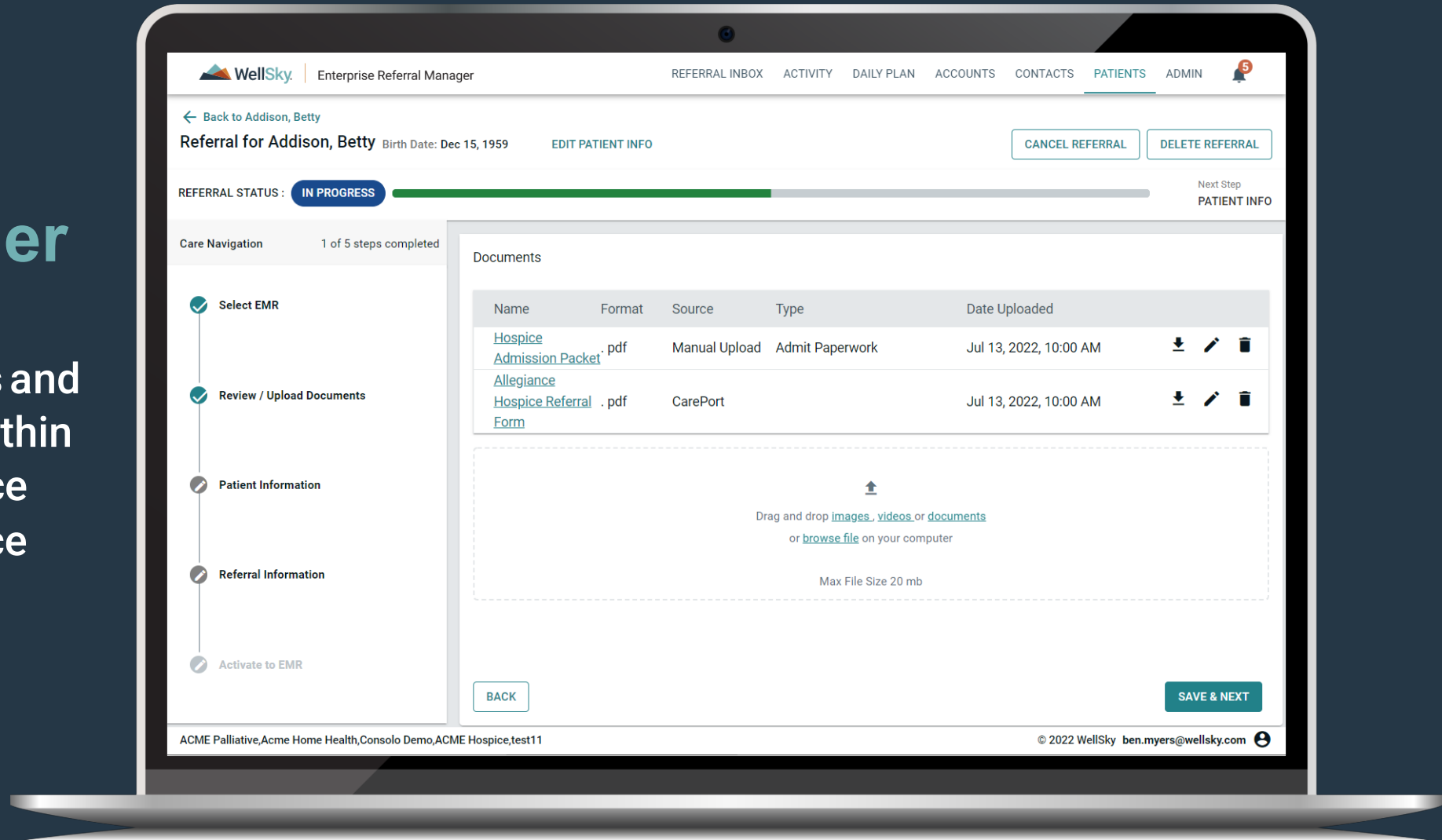
**SUBMIT**

Will roll-out in  
Beta end of  
year into 2023

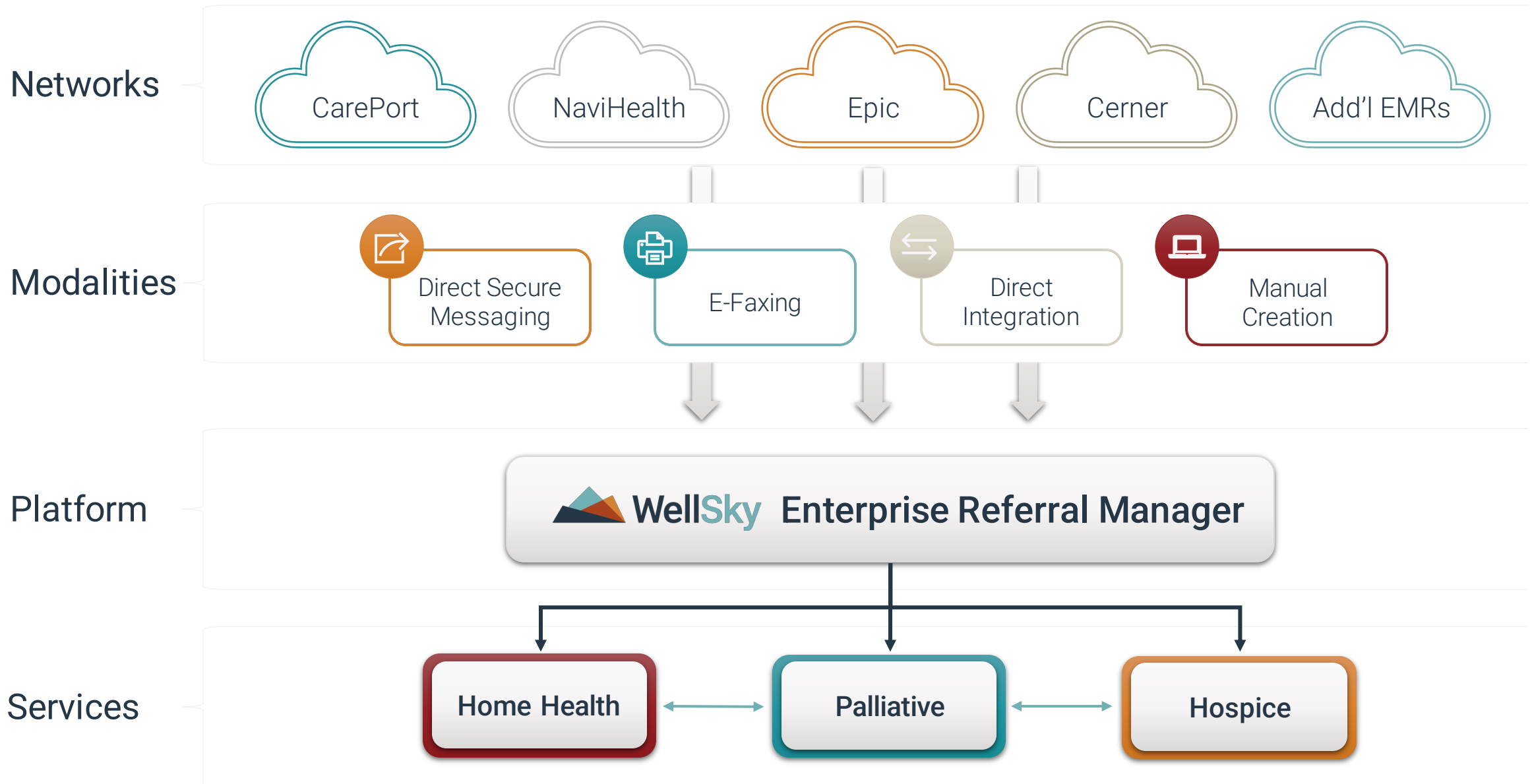
Now recruiting for Beta!

# WellSky Enterprise Referral Manager

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



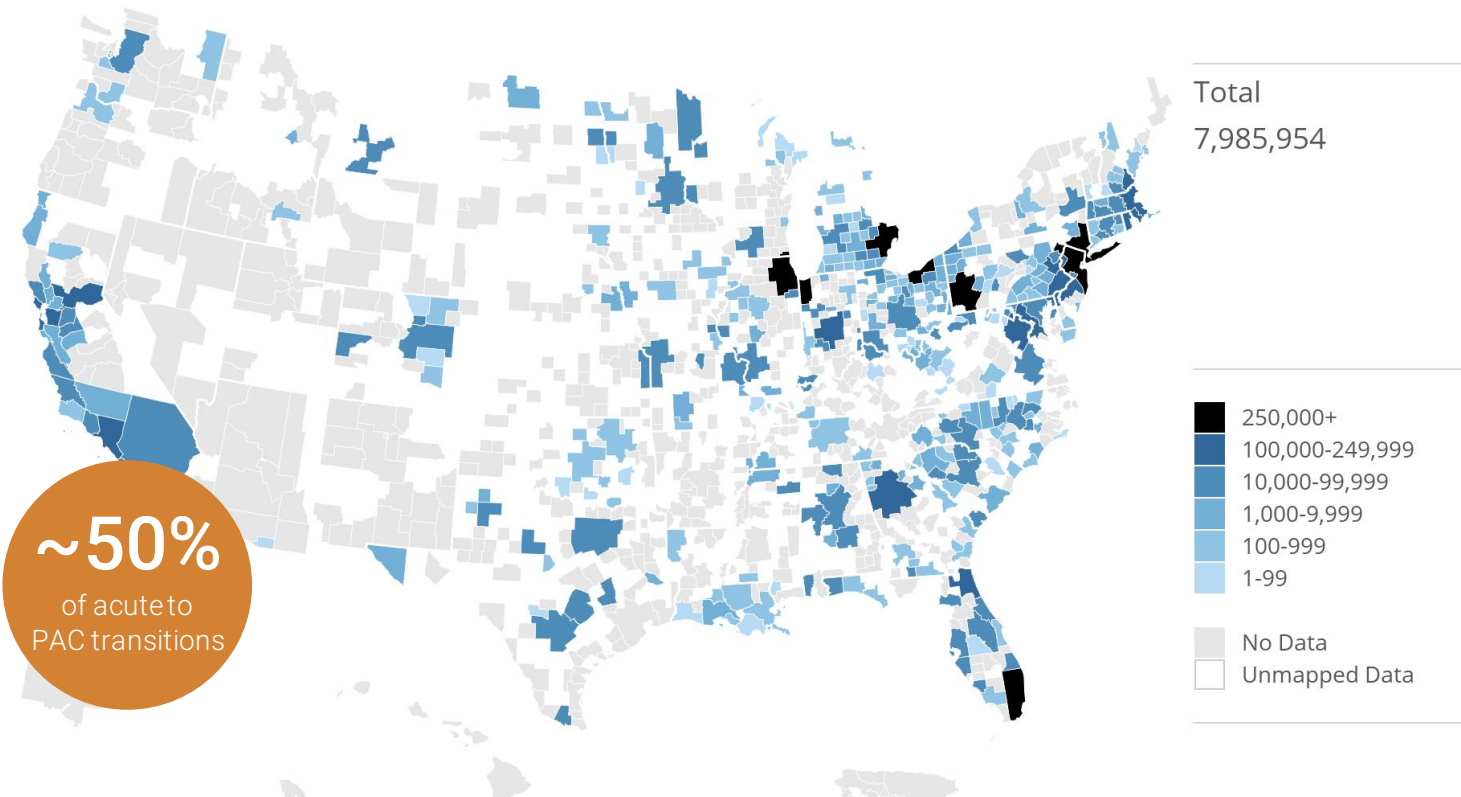
# Manage your network of referral sources directly into a central inbox



# 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

The screenshot displays the WellSky Enterprise Referral Manager interface. The top navigation bar includes 'WellSky | Enterprise Referral Manager' and a menu with 'REFERRAL INBOX', 'ACTIVITY', 'DAILY PLAN', 'ACCOUNTS', 'CONTACTS', 'PATIENTS', and 'ADMIN'. Below the navigation, there is a 'Providing Care' section with an 'Inbox' tab and a 'Select a Region' dropdown menu. 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 records, all with a status of 'In Progress'. Each row includes a 'Referral Sender' icon and a 'Docs' icon in the 'Referral Details' column, and a vertical ellipsis in the 'Actions' column.

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	Fergusen, Gene	6/24/1938	Enterprise Referral Manager	Coastal Clinic	Coastal Palliative Care	In Progress	Referral Sender Docs	⋮

Coastal Hospice Care, Coastal Palliative Care, CSG Home Health © 2022 WellSky charles.kleinheksel@wellsky.com

## 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

The screenshot displays the WellSky Enterprise Referral Manager interface for a patient named Harry Potter. The interface includes a navigation bar at the top with options like REFERRAL INBOX, ACTIVITY, DAILY PLAN, ACCOUNTS, CONTACTS, PATIENTS, and ADMIN. Below the navigation, there's a section for patient information (Name, SSN, DOB, Gender) and a 'Patient Questions' table. The 'Patient Questions' table has the following data:

Question	Responses	Other Response	Date	Recorded By
How did you hear about us_263229?	Internet	N/A	2/23/22, 11:27 AM	Myers, Benjamin

Below the questions is a 'Recent Activity' section showing 'No Activity for this Patient'. The 'Referral History' section shows two referrals:

Line of Service	Referral Status	Care Navigator	Actions
ACME Hospice	IN PROGRESS	Magee-Jenks Chris	57 Days Awaiting Referral Info, RESUME
ACME Palliative	ACTIVATED	Myers Benjamin	VIEW

## Benefits

Reduced  
Workflow  
Redundancy

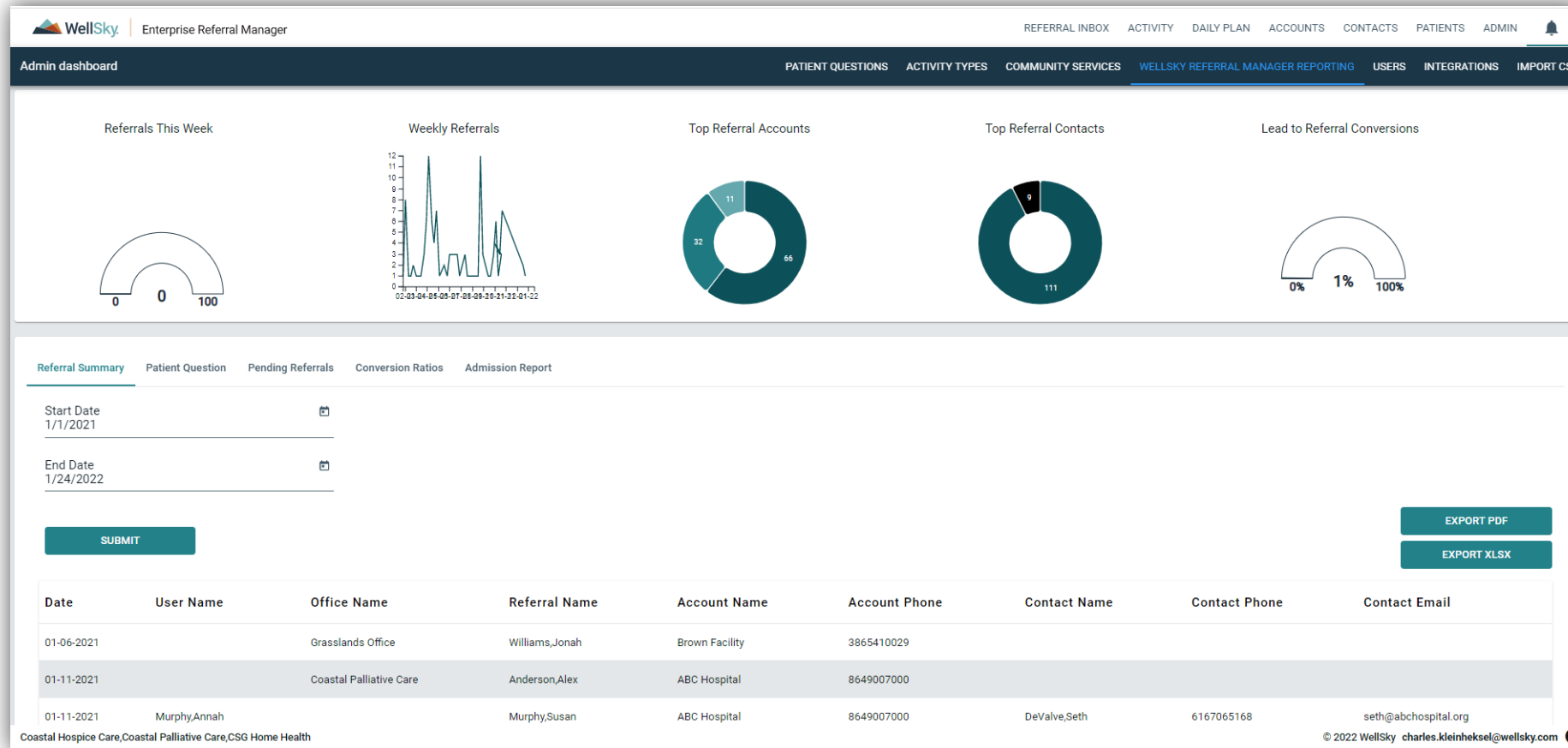
Patient Care  
Optimization

More Informed  
Care Delivery

- Simplified creation of new patient records within the 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

# Electronic Visit Verification (EVV)

Rollout starting Oct 2022

- A Medicaid initiative intended to prevent fraud
- Verifies that a Home Health caregiver is providing care where and when that care is expected
- Information to be verified:
  - Type of service being performed
  - Individual receiving the service
  - Date of the service
  - Location of service delivery
  - Individual providing the service
  - Time the service begins and ends
- All states must comply by January 1, 2023



# What is WellSky doing to address Electronic Visit Verification (EVV) requirements in Home Health?



**Enhanced Visit Verify (formerly KVV) for integrated experience**



**New Feature – Transaction List to manage the status of each visit**



**Services to support clients through EVV certification process**

# Electronic Visit Verification (EVV)

## Step 1: Access Hotbox (via tablet)

WellSky Home Health | Nathan Minger Home Health | Welcome, Nathan Minger | AMDebug | Log Out |

Go To File Search CareInsights Help

**Hotbox** RESET FILTER

Branch: All | Tasks: All | Date range: 12/19/2021 to 01/19/2022 | Apply filters

Visits in *italics* have been added or edited within the past 48 hours.  
Visits in **red** occurred in episodes that have already ended.

All branches, all task types, from 12/19/2021 to 01/19/2022

Show 25 entries | Grouped by Date | Filter by search:

Date	Patient	Task	Status	Action
Wed 01/12/2022	Davis, Harwyn	OASIS-D1 Start of Care	Not Started	Clock In
Thu 01/13/2022	Davis, Harwyn	OASIS-D1 Discharge	Not Started	Clock In

Showing 1 to 2 of 2 entries

## Step 2: Clock In

WellSky Home Health | Nathan Minger Home Health | Welcome, Nathan Minger | AMDebug | Log Out |

Go To File Search CareInsights Help

**Hotbox** RESET FILTER

Branch: All | Tasks: All | Date range: 12/19/2021 to 01/19/2022 | Apply filters

Visits in *italics* have been added or edited within the past 48 hours.  
Visits in **red** occurred in episodes that have already ended.

All branches, all task types, from 12/19/2021 to 01/19/2022

Show 25 entries | Grouped by Date | Filter by search:

**Clock Into Visit: Davis, Harwyn**

MRN: 8004  
Date of Birth: 01/15/1955  
Start of Care: 01/01/2022

Visit: OASIS-D1 Start of Care  
Scheduled Start Date/Time: 01/19/2022 5:30 PM CST  
Scheduled End Date/Time: 01/19/2022 7:30 PM CST

Patient Address: 16 Allyson Circle, Little Rock, AR, 72209, CST

Cancel | Submit Clock In

## Step 3: Perform Care

# Electronic Visit Verification (EVV)

## Step 4: Access Hotbox

Go To File Search CareInsights Help

**Hotbox** RESET FILTER

Branch: All  
Tasks: All  
Date range: 12/19/2021 to 01/19/2022 Apply filters

Visits in **italics** have been added or edited within the past 48 hours.  
Visits in **red** occurred in episodes that have already ended.

## Step 5: Click to Clock Out

All branches, all task types, from 12/19/2021 to 01/19/2022

Show 25 entries Grouped by Date

Date	Patient	Task
<b>Wed 01/12/2022</b>		
Wed 01/12/2022	Davis, Harwyn	OASIS-D1 Start of
<b>Thu 01/13/2022</b>		
Thu 01/13/2022	Davis, Harwyn	OASIS-D1 Dischar

Showing 1 to 2 of 2 entries

WellSky Home Health Nathan Minger Home Health

Welcome, Nathan Minger | AMDebug | Log Out

**Clock Out of Visit: Davis, Harwyn**

MRN: 8004  
Date of Birth: 01/15/1955  
Start of Care: 01/01/2022

Visit: OASIS-D1 Start of Care  
Scheduled Start Date/Time: 01/19/2022 5:30 PM CST  
Scheduled End Date/Time: 01/19/2022 7:30 PM CST  
Clock In Date/Time: 01/19/2022 5:43 PM CST

Patient Address: 16 Allyson Circle, Little Rock, AR, 72202  
Clock-in Address: 16 Allyson Circle, Little Rock, AR, 72202

Cancel


## Step 6: Get patient signature and submit Clock Out

WellSky Home Health Nathan Minger Home Health

Welcome, Nathan Minger | AMDebug | Log Out

**Get Patient Signature: Davis, Harwyn**

Please sign below to verify that Nathan Minger, PTA was in your home on 01/19/2022




Patient unable to sign

Notice of Privacy Practices

Cancel Clear **Submit**

# Electronic Visit Verification (EVV)

## Step 7: Review submitted EVV transactions




### EVV Transactions

Include Approved transactions

Transaction Date	Patient / Clinician	Status	Transaction ID & Type	Parent Insurance / Aggregator	
01/26/2021 04:00 PM CST	Addison, Betty K. Earl, OT	Error Status details go here Status details go here	25186711 Type: Client	Insurance name Aggregator name	☰
01/26/2021 03:40 PM CST	Hare, Vera K. Fox, PT	Queued Status details go here Status details go here	25186710 Type: Caregiver	Insurance name Aggregator name	☰
01/26/2021 02:00 PM CST	Miller, Edward K. Earl, OT	Queued Status details go here Status details go here	25186709 Type: Resource	Insurance name Aggregator name	☰
01/26/2021 10:00 AM CST	James, Ethel I. Gardner, RN	Queued Status details go here Status details go here	25186708 Type: Client	Insurance name Aggregator name	☰
01/26/2021 09:00 AM CST	Diaz, Luis K. Earl, OT	Queued Status details go here Status details go here	25186707 Type: Agency	Insurance name Aggregator name	☰

## Step 8: View, edit, and resubmit transactions



### EVV Transaction 25186711

01/26/2021 | Betty Addison | K. Earl, OT | Visit CANCEL RESUBMIT

BACK

Status: **Error**

Check-in date: 01/26/2021 | Check-in time: 08:30 AM CST | Check-out date: 01/26/2021 | Check-out time: 09:24 AM CST

#### Exceptions/Errors

Please select at least one reason code for this resubmit.

Exception	Expected response / Reason code
3, Visit without in call	Fix Reason code: 30, Device issue Explanation: * This is an example of very long explanation text that requires a few lines. This explanation goes on for a while. The field could expand vertically as needed to fit the content, up to a limit of 256 char (perhaps less if we want to limit the height). Char: 250/256
15, Unmatched client ID	Acknowledge <input type="checkbox"/> I acknowledge this exception. Reason code: 10, Individual data issue

I attest I have proper documentation to support this visit.

#### Audit log

Modified date	User	Action	Field	Changed from	Changed to	Content
01/26/2021 11:05 AM	username	Resubmit	—	—	—	<a href="#">view</a>



# Know your states EVV Model

## Open Vendor

*Providers can use state-sponsored vendor free of charge or work with another EVV vendor at their own expense*

## Provider Choice

*Providers select vendors and cover the costs. (Some states that chose this model will raise reimbursement rates to help offset the cost to agencies.)*

## MCO Choice

*Managed care organizations (MCOs) select the vendor and cover the costs, often with state support*

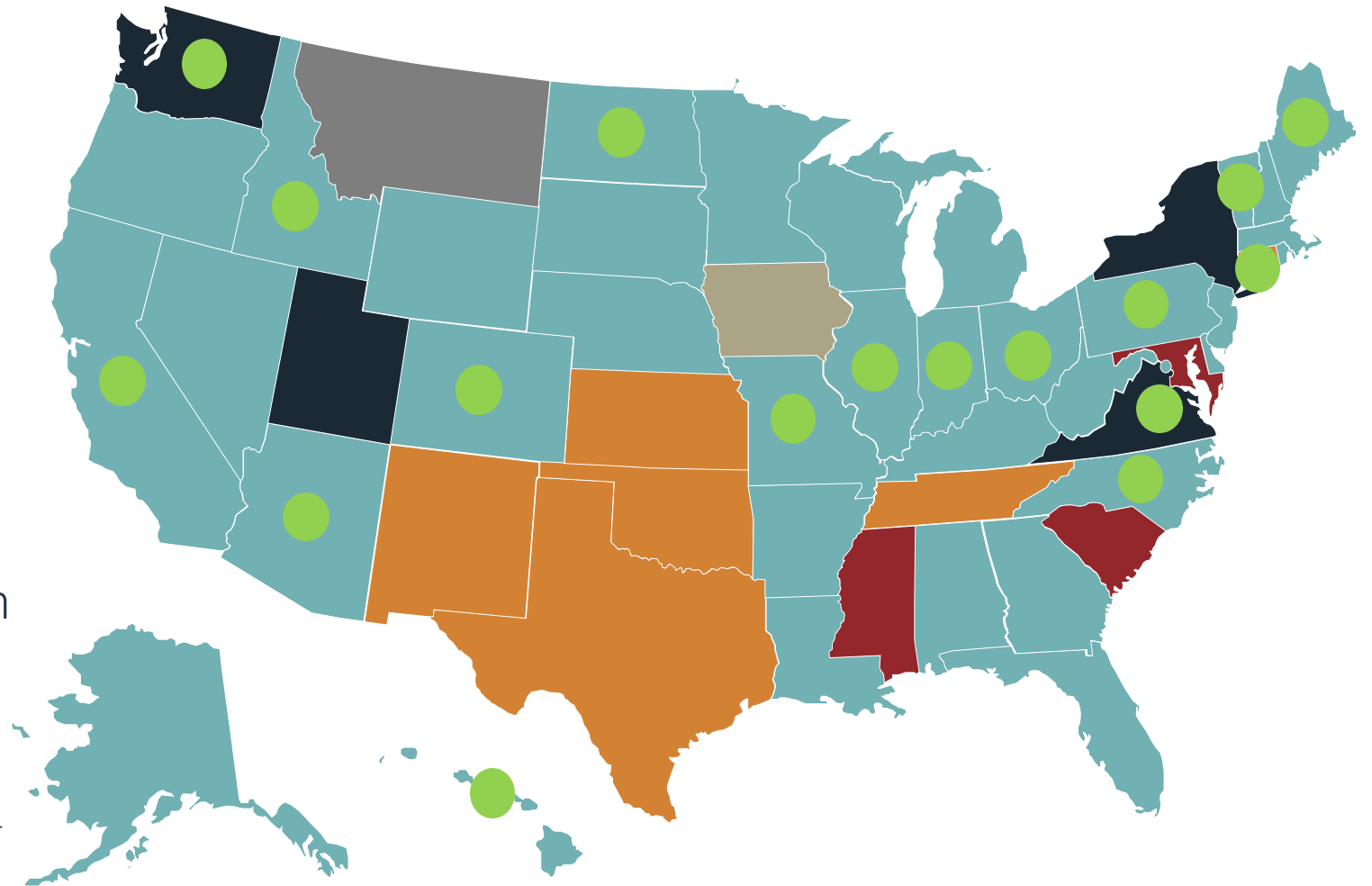
## State-Mandated In-House System

*States build and manage their own EVV system that all providers must use*

## State-Mandated External Vendor

*Providers must use state-sponsored, state-funded vendor*

## Undecided or Unknown



 Sandata States

# Getting Started

## Active Implementation States

1. Reach out to your aggregator to begin the testing process
2. Send an email to [ccmedicaid@wellsky.com](mailto:ccmedicaid@wellsky.com) requesting EVV module activation.
3. Participate in aggregator training
4. Forward testing credentials to WellSky when you receive them
5. A WellSky specialist will be in touch with next steps

## States Pending Implementation

1. Reach out to your state, MCO and aggregator to understand timing and requirements
2. Email us any updates you receive at [ccmedicaid@wellsky.com](mailto:ccmedicaid@wellsky.com)
3. Train your staff on EVV requirements
4. Ensure your staff is trained on the mobile application
5. Educate your client base
6. We will communicate the status and steps in the testing process as soon as we receive information

## Closed States

1. We would like to hear from you about the process being used in your state
2. Help us advocate for open models by contacting [ccmedicaid@wellsky.com](mailto:ccmedicaid@wellsky.com)
3. Contact your state and MCOs to let them know you have a system that is EVV ready!

*Reach out to your Account Representatives for additional information and resources regarding EVV*



# Frequency Manager: Future Enhancements

December 2022

## Order Creation Workflow Update:

- Update to the Order Creation process to allow users to create frequencies/PRN's however they want, edit them as needed, and add them to an order when they are ready.
- New column on the Frequency Manager homepage to indicate that the frequency/PRN is or is not on an order.
- We will be giving the user more options of orders to create during the Order Creation process.

The screenshot shows the 'Workflow, New' page in the WellSky Home Health system. It features a navigation bar with 'Go To', 'File', 'Edit', 'View', and 'Help'. Below the navigation bar, there are buttons for 'CREATE ORDER', 'ADD PRN', and 'ADD FREQUENCIES'. The main content area is divided into two sections: 'SUMMARY' and 'DISCONTINUED'. The 'SUMMARY' section contains a table with columns for Discipline, Dates, Description, On Order?, and Discontinued Date. The table lists several entries for Skilled Nursing and Physical Therapy. The 'On Order?' column has green checkmarks for some entries and red X marks for others. The 'DISCONTINUED' section is currently empty.

Discipline	Dates	Description	On Order?	Discontinued Date
Skilled Nursing	11/22/2021 - 11/28/2021	1 visit per week for 1 week	✓	
Skilled Nursing	11/29/2021 - 01/16/2022	4 visits per week for 7 weeks	✓	
Physical Therapy	11/22/2021 - 11/22/2021	1 visit per day for 1 day	✗	
Physical Therapy	11/28/2021 - 11/28/2021	1 visit per week for 1 week	✗	
Physical Therapy	11/29/2021 - 12/26/2021	2 visits per week for 4 weeks	✗	

## Additional Enhancements

- Discontinue Workflow
- Change Order Error Correction Workflow
- Physician Order/Therapy Eval and ReEval - Incorporation into Frequency Manager
- PRN Alerts
- Corporate Level Frequency Manager Alerts Report
- Hard Stops for Scheduling based on Frequency and PRNs Ordered

The screenshot shows the 'Submit Frequencies' page in the WellSky Home Health system. It features a navigation bar with 'Go To', 'File', 'Edit', 'View', and 'Help'. Below the navigation bar, there are buttons for 'ADD PRN' and 'ADD FREQUENCIES'. The main content area is divided into two sections: 'Submit Frequencies' and 'Frequency Draft'. The 'Submit Frequencies' section contains a dropdown menu for 'Select Order:' with options: 485, Frequency Order, PRN Order, Physician Order, PHO, and SCIC. The 'Frequency Draft' section contains a table with columns for Date Range, Visits, and Duration. The table lists two entries for Occupational Therapy.

Discipline	Effective Date	Authorized
Occupational Therapy	11/22/2021 - 11/22/2021	
Occupational Therapy	11/23/2021 - 12/12/2021	

# WellSky Resource Manager

Driving Operational Excellence

Rollout starting Feb 2023



1

**Appointment / Staff Scheduling**

Streamlined processes & predictive insights to optimize staffing efficiency

2

**Staff Credentialing**

Manage credentialing to assure appropriate staff is scheduled for patient need

3

**Labor Management**

Analyze resource costs & make changes in real time to maximize productivity & profitability

4

**Time & Attendance**

Track staff time & mileage along with EVV capabilities to drive visit compliance

# 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

**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		<b>OT Routine</b> Betty Addison 3x/wk for 3 wks 120 W Elm Ln Springfield, MO 65619	<b>OT Eval</b> Kianna Pham 54 E Maple Ln Springfield, MO 65619	<b>OT Routine</b> Betty Addison 3x/wk for 3 wks 120 W Elm Ln Springfield, MO 65619	<b>OT Routine</b> Heath Atwood 2x/wk for 3 wks 14 S Finley Rd Springfield, MO 65619	<b>OT Routine</b> Betty Addison 3x/wk for 3 wks 120 W Elm Ln Springfield, MO 65619	
10:00				Travel 6.6mi – est. 23m			
10:15							
10:30							
10:45		Travel 6mi – est. 15m			Travel 2.5mi – est. 8m	<b>OT Eval</b> Casey Thorton	
11:00		<b>OT Eval</b> David Chavez 30 Main St Springfield, MO 65618		<b>OT Routine</b> Vera Hare 3x/wk for 3 wks 10 E 10th St Strafford, MO 65717	<b>OT Routine</b> Drew Cano 2x/wk for 3 wks 88 N Finley Rd Springfield, MO 65619		
11:15			Travel 3mi – est. 10m				
11:30							
11:45							
12:00 P			<b>OT Routine</b> Heath Atwood 2x/wk for 3 wks 14 S Finley Rd Springfield, MO 65619	Travel 10mi – est. 20m	Travel 3.6mi – est. 10m	<b>OT Discharge</b> Deanna Hodges	10 Middle Way Springfield, MO 65619
12:15				<b>OT Routine</b> Vera Hare 3x/wk for 3 wks 10 E 10th St Strafford, MO 65717			
12:30							
12:45		Travel 3.6mi – est. 10m				Travel 10mi – est. 20m	
01:00		<b>OT Eval</b> Kianna Pham	Travel 3.6mi – est. 10m		<b>OT Routine</b> Drew Cano 2x/wk for 3 wks 88 N Finley Rd Springfield, MO 65619		<b>OT Routine</b> Vera Hare 3x/wk for 3 wks 10 E 10th St Strafford, MO 65717
01:15							
01:30			<b>OT Routine</b> Drew Cano 2x/wk for 3 wks 88 N Finley Rd Springfield, MO 65619	Travel 10mi – est. 20m		<b>OT Eval</b> Phillip Miller	Travel 2.5mi – est. 8m
01:45							
02:00				<b>OT Routine</b> Zane Mayes		<b>OT Routine</b> Zane Mayes	

**WellSky Mobile**

CHECK IN | TIME & TRAVEL | SCF

**Betty Addison** | OT Routine

120 W Elm Ln  
Springfield, MO 65619

(606) 222-1212

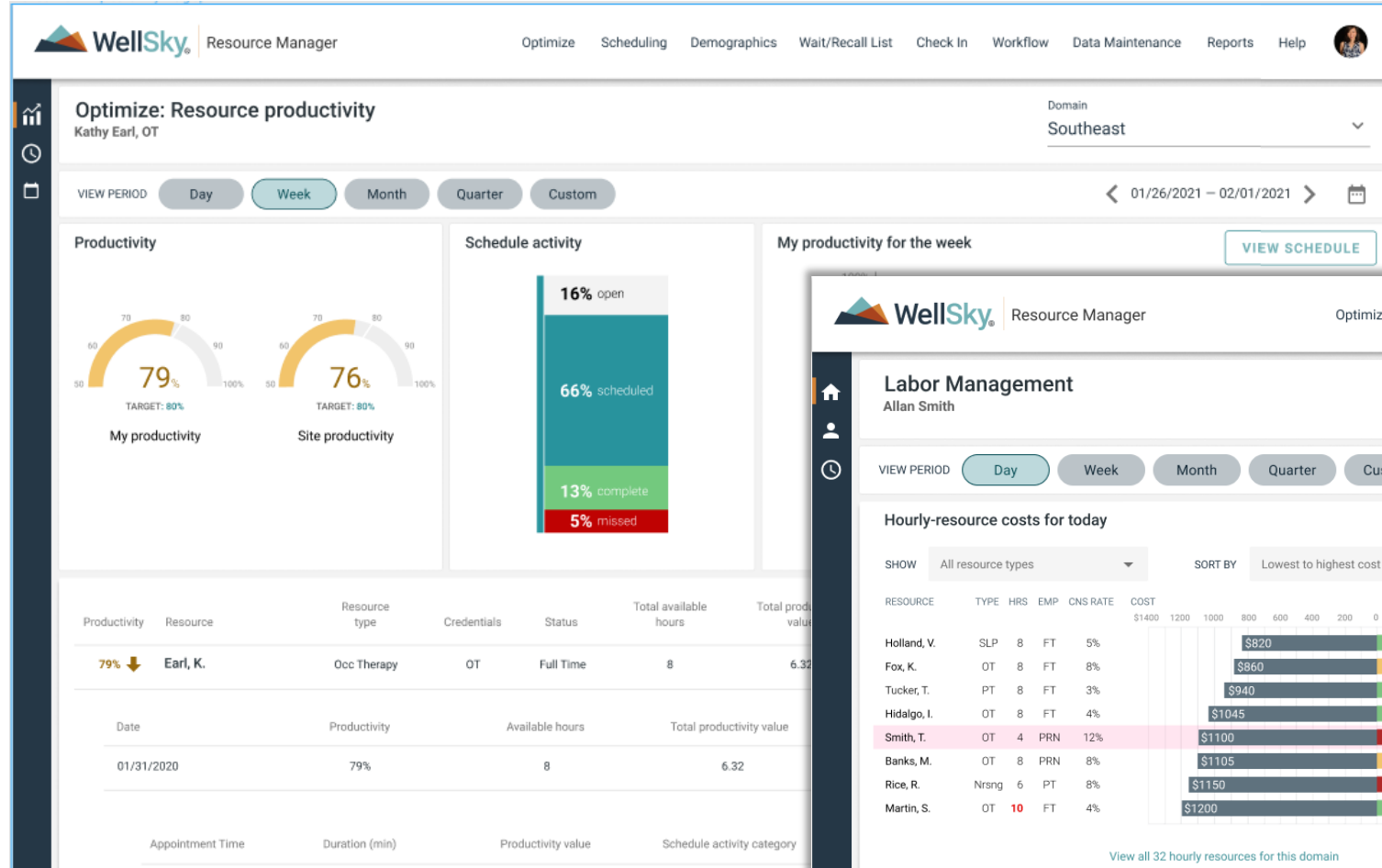
Fri 1/31/21 | 9:45 AM – 10:30 AM

Location last obtained 9:45 AM

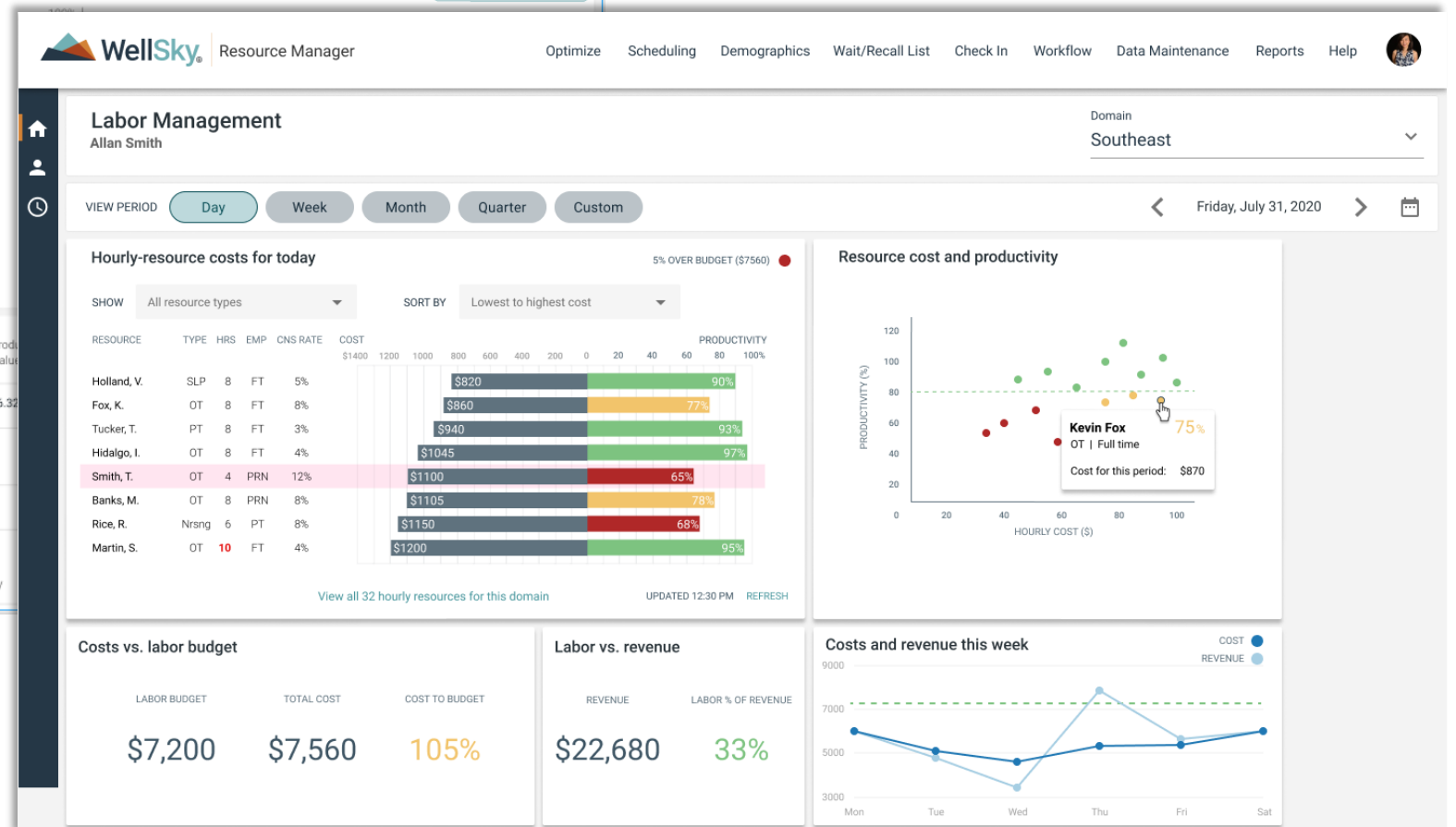
7 35  
8 40  
**9 45 AM**  
10 50 PM  
11 55

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

# Tools to optimize and manage labor at scale

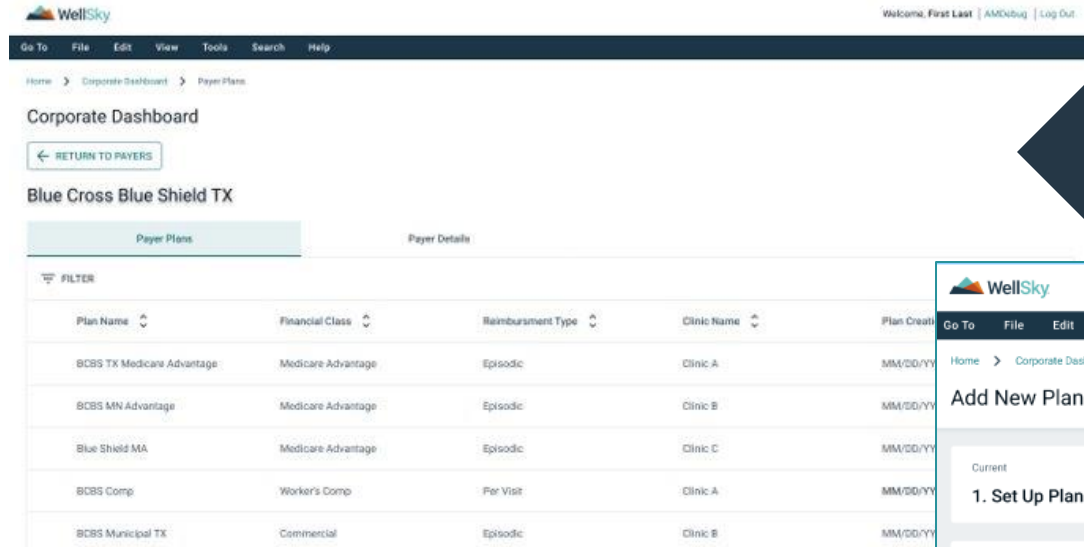


- View resource productivity
- Insights on organizational performance & productivity
- Labor management metrics

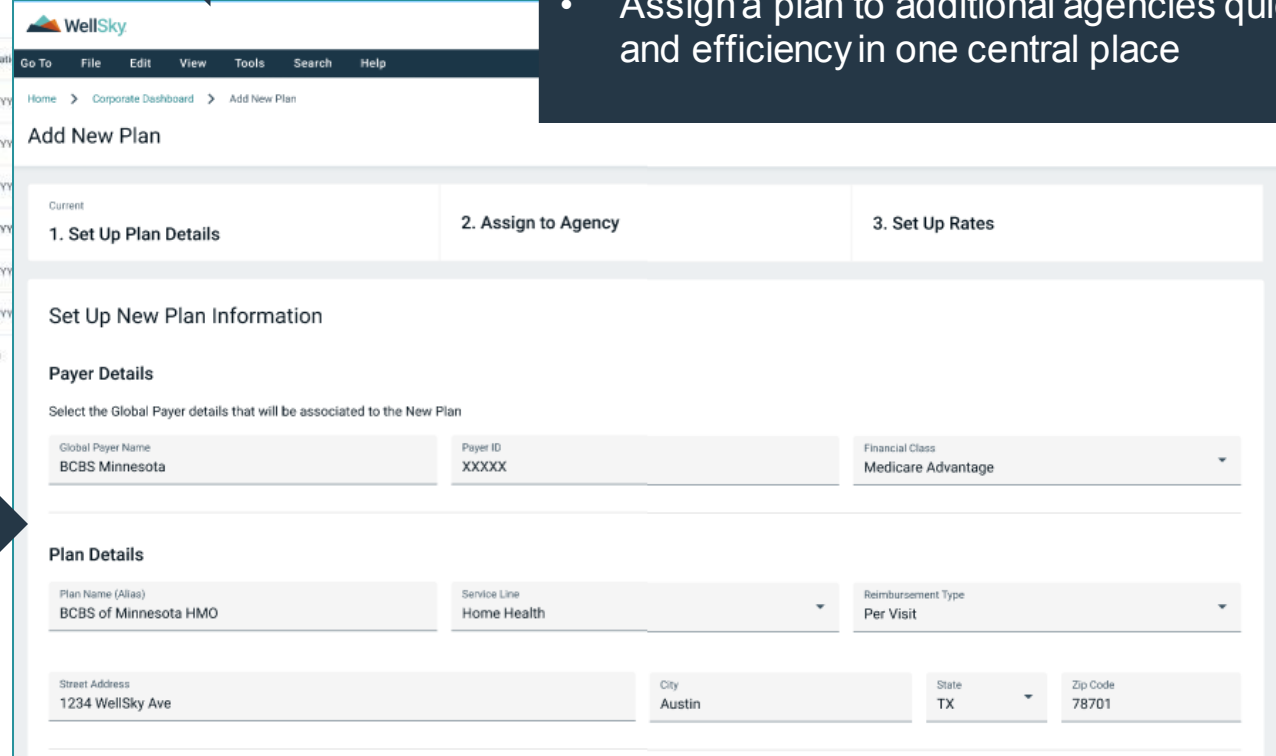


# Revenue Cycle Management

# Global payer management for centralized administrative set up

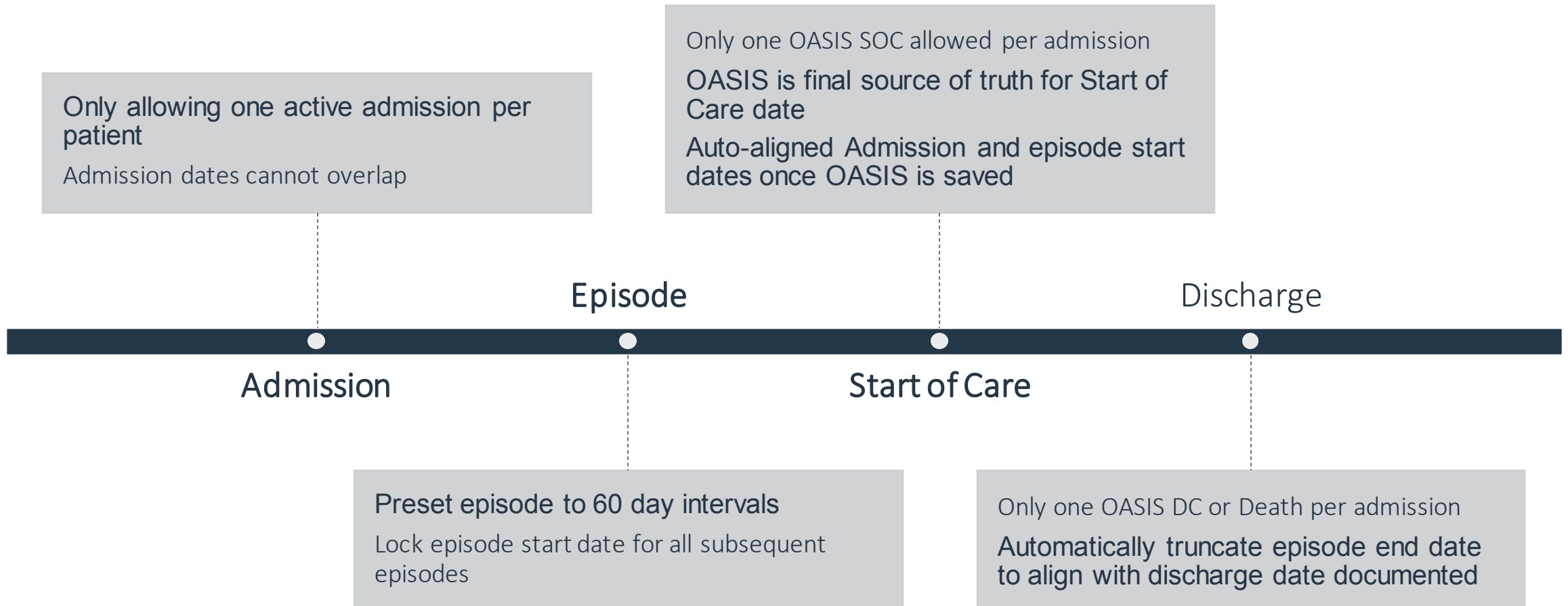


- Set the plan's billing requirements to ensure the appropriate claim data is populated
- Set custom validations to check before billing to ensure clinical documentation requirements are met



- View all payers in your organization from one corporate dashboard
- Report and manage payers with separation by financial class and reimbursement type
- Assign a plan to additional agencies quickly and efficiently in one central place

# Scheduling validations synchronize data to prevent user error in data entry for downstream billing



# Medicare Secondary Billing

## NOA

- Generates upon Start of Care when Medicare is selected as primary or secondary

## Primary Payer

- Document primary payment and select "Forward to Secondary"

## Medicare Final Claim

- Auto generate EOE after the primary payer has paid

## Reporting

- Report any additional revenue expected based difference between HIPPS and previous reimbursement



# Streamlined payment and adjustment posting

- **New write off process**
  - Standalone ability to create a write off without generating a \$0 remittance and adjustment
  - Additional customization of write off codes
- **Automated small balance adjustments**
  - Setting available to auto-adjust any remaining small balance after a claim is paid
- **Improved payment posting**
  - Increased speed and load times for remittances with a high volume of claims
  - Additional information populated from the 835 file (I.e. HIPPS from Medicare)
  - Improved usability and navigation
- Focus group research in August and September 2022. Development targeted to begin in winter 2022/2023.

# The next phase of Financials – the patient billing history

- A unified and comprehensive transactional ledger of the patient's full billing history
- Summary header for an at a glance understanding
- Claim details including recent follow up notes
- Activity history shows timeline of claim actions and adjustments
- Full list of claims to view patient billing history over time

The screenshot displays a software interface for patient billing history. At the top is a navigation menu with options: Go To, File, Edit, View, Tools, Search, Help. Below the menu is a breadcrumb trail: Home > Episode Manager > Claims.

**Billing Overview**

Total Allowed	Amount Paid	Balance Due
\$ XXX.XX	\$ XXX.XX	\$ XXX.XX

**Patient Information**

Name	Date of Birth
Smith, John	MM/DD/YYYY
Branch	MRN
Austin, TX	XXXXX

**Billing History**

Sort By: [Add text] [Add text] [Add text] [Add text] [Add text]

**Claim Summary**

Claim Number: 123456      Last Action: Claim Sent

Episode Dates: 05/17/2021 - 07/13/2021      Action Date: MM/DD/YYYY

Billing Period: 06/15/2021 - 07/13/2021      Last Notice: MM/DD/YYYY - EL Reached out to payer with additional Chart Info

Payer: John Doe

Date of Service	Task Description	Allowed Amount	Adjusted Amount	Paid Amount	Balance
▲ 06/15/2021	Task 1	\$4000.00	\$0.00	\$0.00	\$4,000
<b>Activity History</b>					
Action Date	Action	Allowed Amount	Adjusted Amount	Paid Amount	Balance
06/17/2021	Item Paid			\$XXX	\$XXX
06/17/2021	Item Adjusted		\$XXX		\$XXX
06/17/2021	Line Item Added	\$XXX			\$XXX
<b>Total Balance: \$1,000.00</b>					
▼ 06/15/2021	Task 2	\$0.00	\$0.00	\$500.00	\$3,500
▼ 06/15/2021	Task 3	\$0.00	\$0.00	\$500.00	\$1,000
<b>Total Balance: \$3,000.00</b>					

# RCM Office Hours

The RCM team holds monthly Office Hours on the first Wednesday of every month at 11am CT.

## Presenters

- Solutions
- Support
- Revenue Cycle Services

## Agenda

- Recent enhancements or bug fixes
- Upcoming enhancements and known issues
- Solutions research questions and focus group opportunities

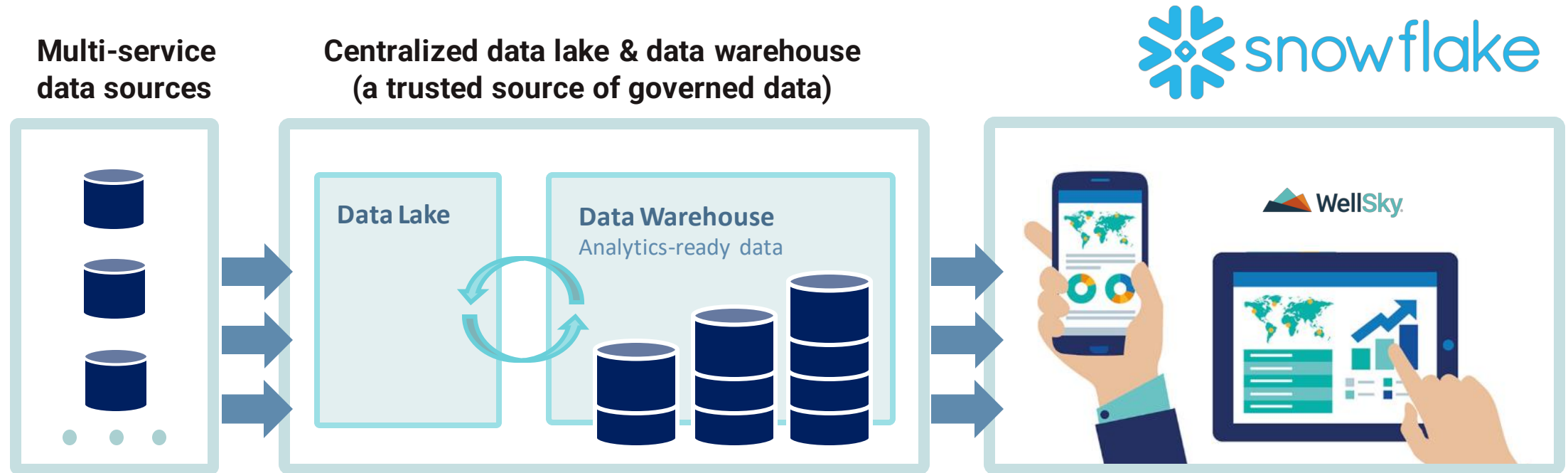
## Access

- WellSky users can access Office Hours from the link in Online Help under Financials > RCM Office Hours

# Data and Analytics

# Direct Data Access to your data through Snowflake

Now Available



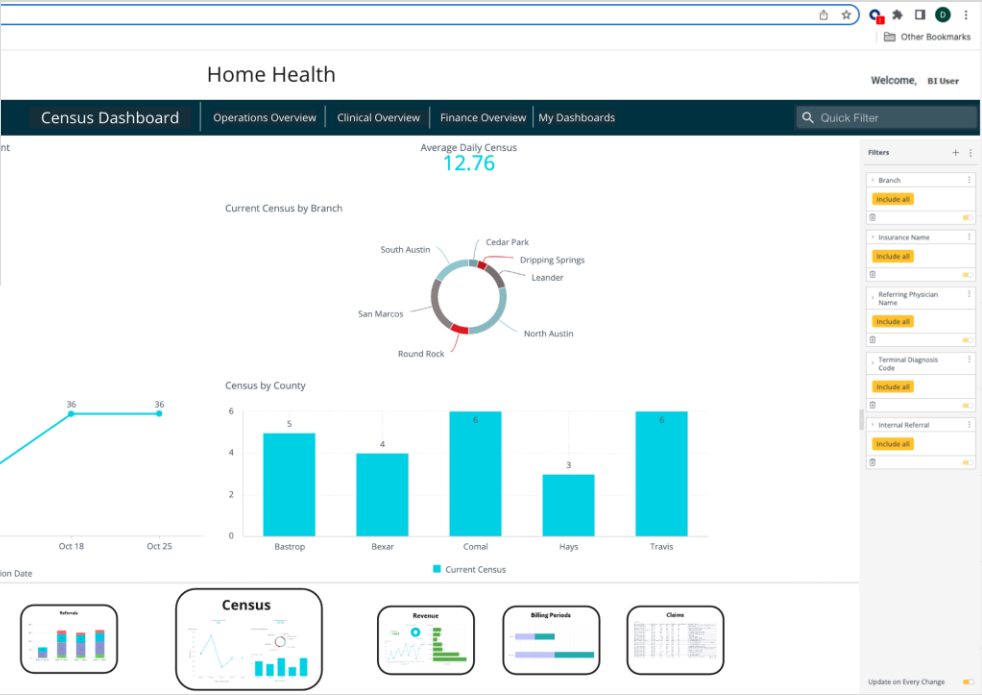
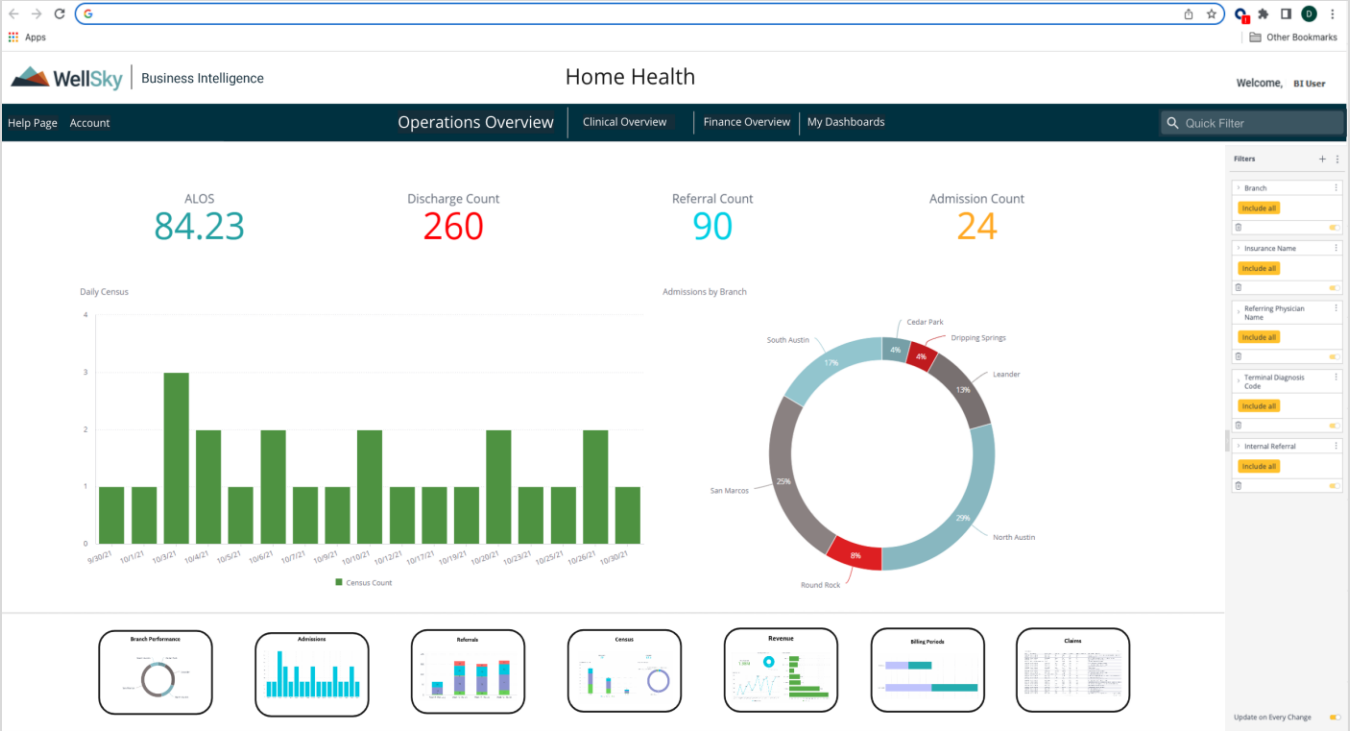
## Key Capabilities

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

# Business Intelligence

Coming 2023

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



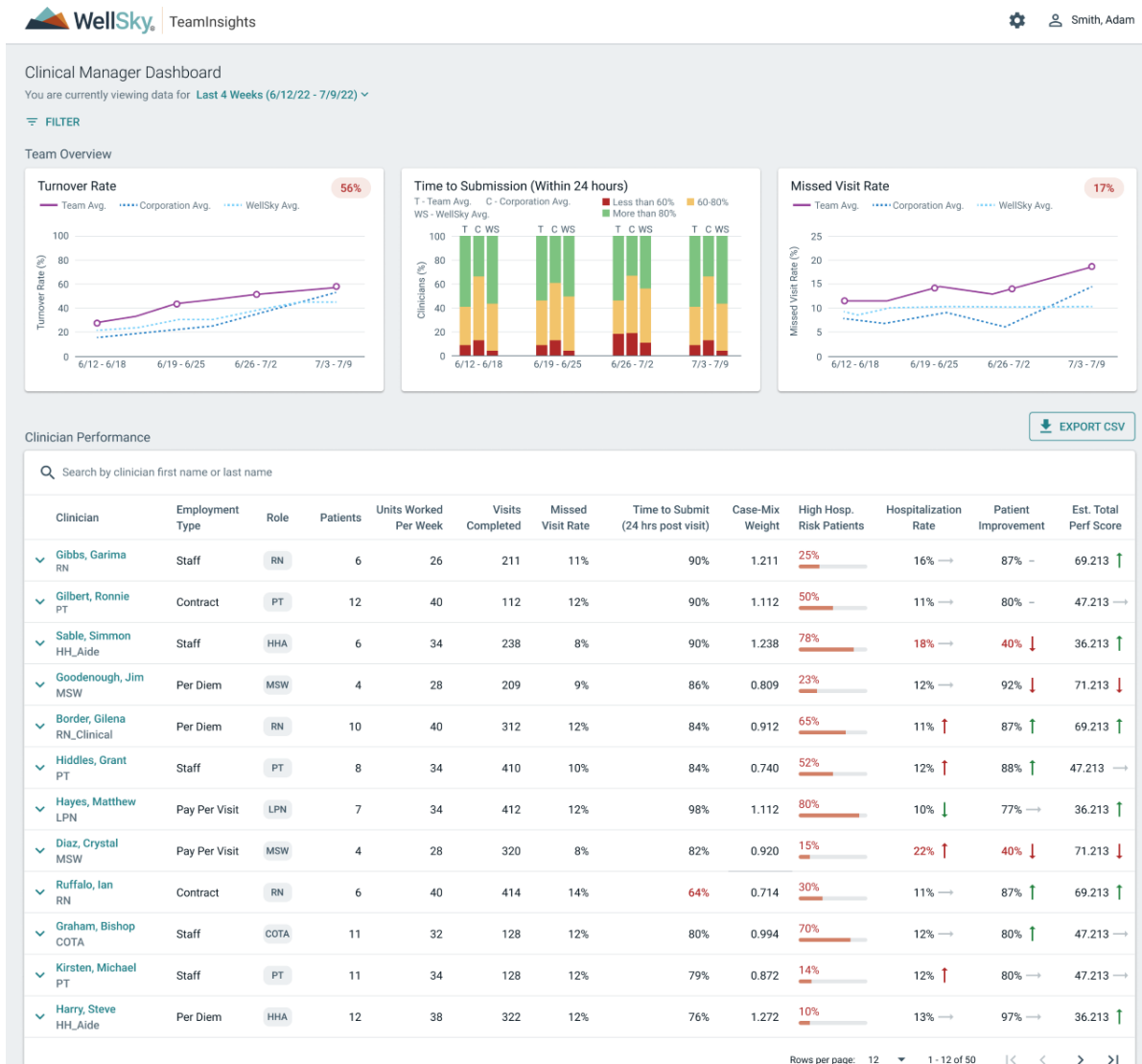
- Report customization
- Drill down
- Benchmarking

# TeamInsights Clinical Manager Dashboard

## Front-line Clinician Performance Analytics

Now Available

- **Compare recent clinician performance** across key workload, quality, and outcome metrics
- **Detect workload and quality tradeoffs** where overstaffed clinicians may be more likely to miss visits or take longer to submit documentation
- **Identify clinicians who may be below** workload, documentation, or patient improvement targets, so you can engage them proactively



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

Now Available

Whole Family Engagement



Continuous  
Monitoring  
AI/ML

Care Team  
Insight and Action

Patient Prioritization

Actionable Insights

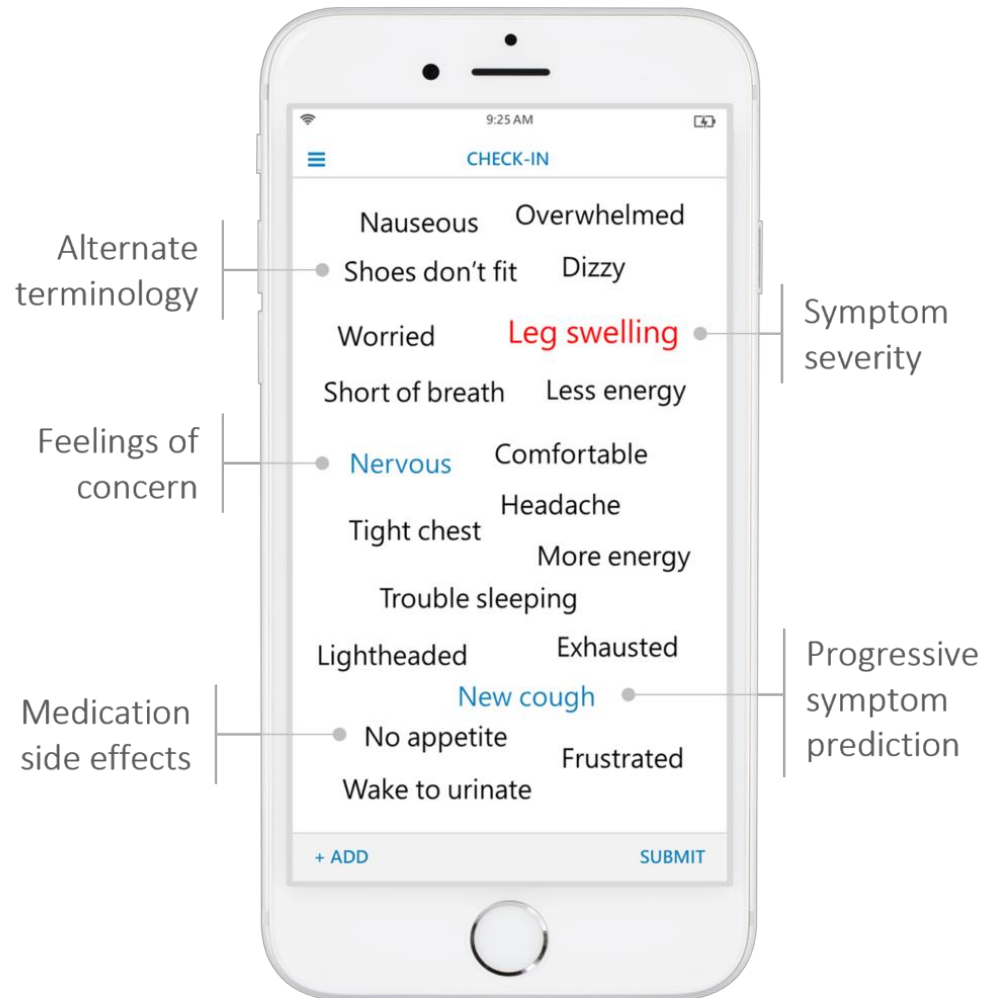
Treatment Efficacy





# 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

# CareForum 2022

The WellSky® Conference

# Thank you.

**Contact us:**

Michelle Justiss

VP Solution Management

[Michelle.justiss@wellsky.com](mailto:Michelle.justiss@wellsky.com)



**Request a consultation today!**

