

# Introduction to



# Training Guide



# iPad Basics

See iPad User Manual

**Using Hotspot for Wi-Fi connection:** If you will be working in the field on an iPad you can connect to WiFi at a facility or you can use your personal Hotspot on your work issued phone.

## Wifi: How to Connect to Your Personal Hotspot

Getting online is essential for documenting all of the work you do on a daily basis *and* receiving all of the information you need to provide quality care. Use your iPhone to securely connect to the internet.

1. From the Home screen, select the Settings app.



2. Select Personal Hotspot.



3. Select the Personal Hotspot switch to turn the mobile hotspot on.



To connect to your personal hotspot from your computer or other device:

1. Follow steps 1 – 3 to turn on your personal hotspot.
2. When your personal hotspot is turned on, go to your wifi settings on your computer, and choose your iPhone, e.g. "Nurse Jackie's iPhone."
3. Type in your personal hotspot password, and you are connected!

## Want to Change Your Wifi Password?

1. To change the personal hotspot's password, select Wi-Fi Password.



2. Change the password as desired, then select Done.



## Accessing WellSky

- WellSky is a web based electronic medical record (EMR), you get to WellSky by visiting <https://kinnser.net>
- WellSky functions best in Safari, Google Chrome or Internet Explorer
- In general, when you are using WellSky **do not use the back button in the browser**, you can lose saved data

## WellSky Help

### Did you forget your username or need your password reset and/or do you need your roles/permissions updated?

Do not contact WellSky Help, please contact:

- Your Clinical Manager and/or Administrator on Call
- Lindsay Sisler ([lsisler2@lifebridgehealth.org](mailto:lsisler2@lifebridgehealth.org))
- Gail Forsyth ([gforsyth@lifebridgehealth.org](mailto:gforsyth@lifebridgehealth.org)) and/or
- Kristen Parsons ([kparsons@lifebridgehealth.org](mailto:kparsons@lifebridgehealth.org))

### WellSky Help Options

**E-mail** – Please send questions or non-critical issues to [enterprise.support@wellsky.com](mailto:enterprise.support@wellsky.com). Expect a 1-day response time.

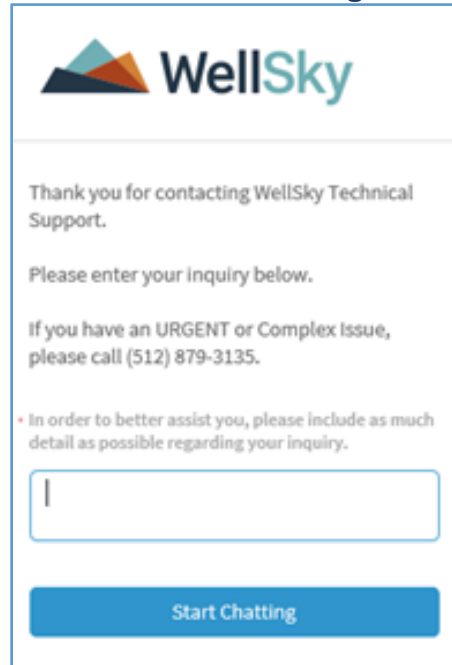
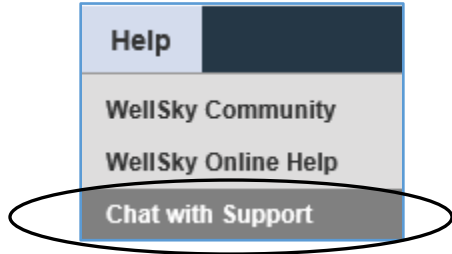
**Call** – Carroll Hospice staff will be placed in a priority queue when calling 877-399-6538 for support.

- Before calling, please send Kristen Parsons ([kparsons@lifebridgehealth.org](mailto:kparsons@lifebridgehealth.org)) any number that you may call support from so that they can add your phone number to the priority caller ID queue.

If you have support issues, please let Kristen Parsons know so that she can be follow up with WellSky.

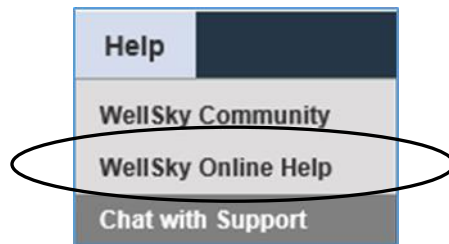
**Chat** – Carroll Hospice staff chat sessions will be prioritized in the chat queue. Chat is open from 8a-8p EST.

- To get to the chat, login to WellSky and go to Help→ **Chat with Support**. Once you select Chat with Support a chat box will pop up in the bottom right hand corner of your screen. Type your question and hit **Start Chatting**.

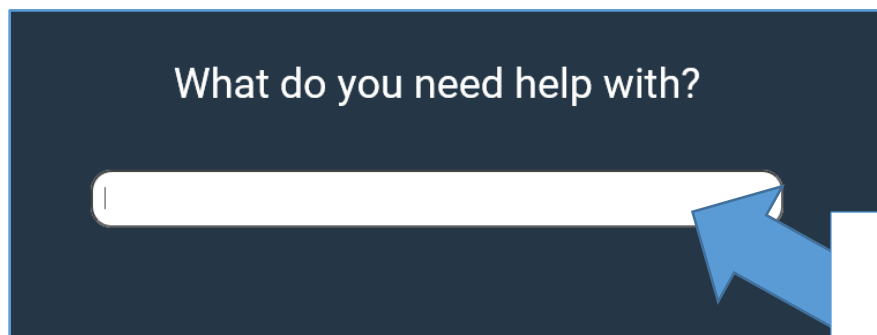


**Online Help –**

1. Login to WellSky and go to Help→ **WellSky Online Help**.

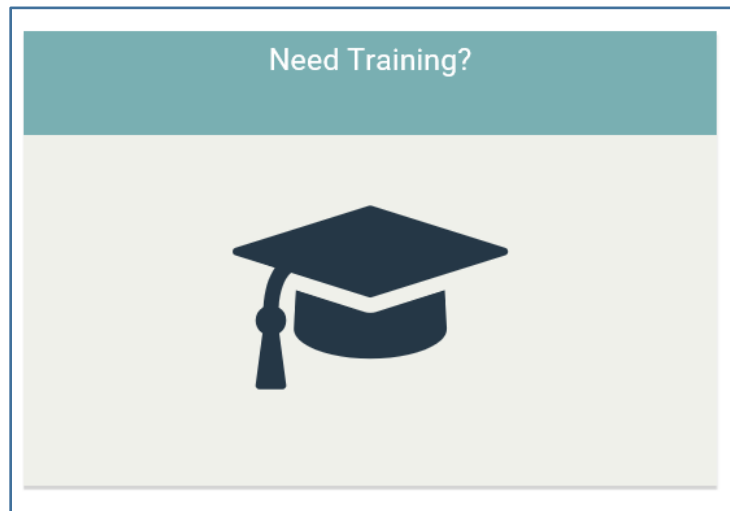


2. A new window will open, and you can search what you're looking for.

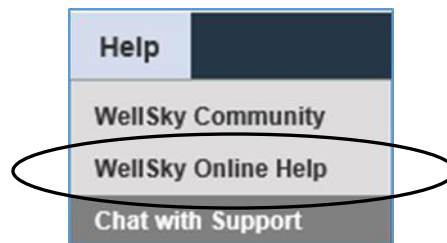


**Type your keyword(s) here. References and videos will populate on your topic.**

3. On the online help page, you can click the **Need Training** option to sign up for live webinars, and watch recorded training on how to use WellSky.



**WellSky Community** – If you can't find the answer you are seeking on the Online Help page you can try the WellSky Community. These are questions and answers posted by WellSky Users. Login to WellSky and go to Help → **WellSky Community**.



## Interactive Help

### What is Interactive Help?

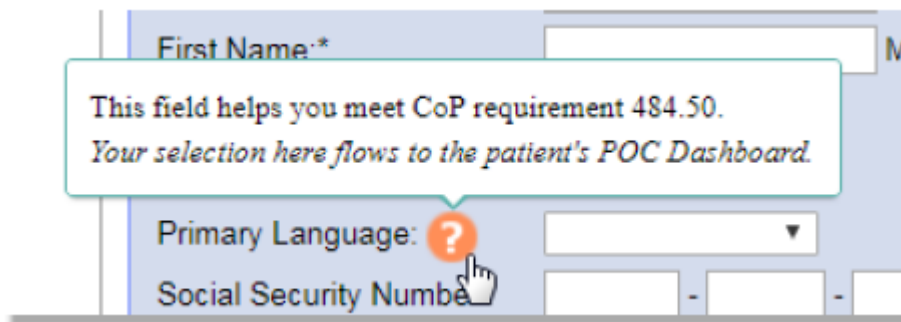
Interactive Help is kind of like an in-application tour guide. Powered by WalkMe, Interactive Help overlays your WellSky application and offers up helpful tips and information. It consists of several types of help elements (tips, process walkthroughs, pop-ups, links to resources, etc.) that are all aimed at helping you use your application more effectively, with minimal issues, so you get the most out of your software. While Interactive Help sometimes links to Online Help resources, the two help systems are pretty different! Interactive Help sits in your application instead of outside of it, so you can get help while you're working without navigating away from your task. Also, Interactive Help is contextual - that means the content offered at any given time depends on where you are in your application.

## What does this mean for Online Help?

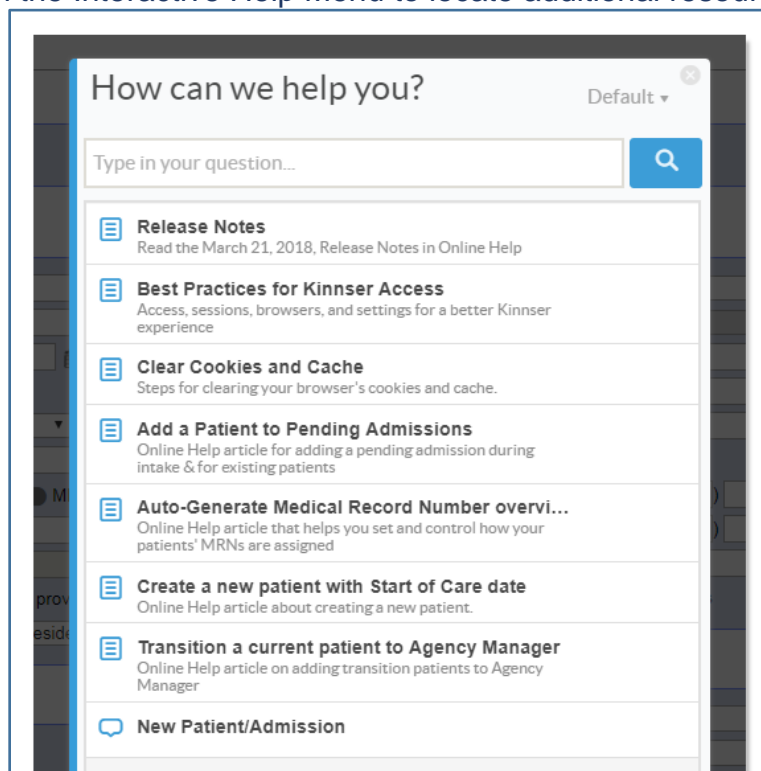
While Interactive Help is a great new addition to our learning and help offerings, it by no means replaces Online Help. Because of its nature, Online Help can accommodate way more information than Interactive Help. So, if there's something you need but it's not readily available via Interactive Help, you can still come to Online Help to search for it. Also, while Interactive Help is great for quick tips, and short procedures, it doesn't easily adapt to sharing overview or workflow information, or even tons of reference information, so you can still use Online Help for that.

## How do I use Interactive Help?

Sometimes you'll see Interactive Help elements right on your application page, like the tips below which appear when you hover over the help icons.

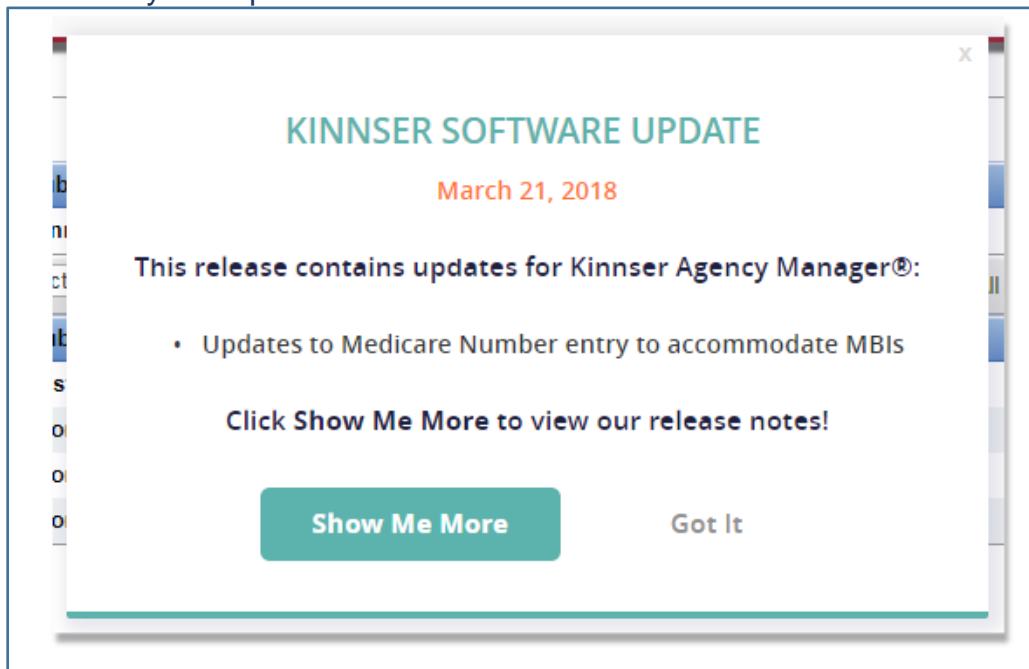


Other times, you'll want to use the Interactive Help Player (a.k.a. Need Help? button) to access resources. Just click the button, and the Interactive Help Menu appears. It lists all the resources available from the page you're currently on. You can also use the Search feature in the Interactive Help Menu to locate additional resources.





Another Interactive Help element you'll see fairly often is a pop-up like the one below; we use these to alert you to changes in your application (new features, updates, etc.) and the availability of helpful resources.



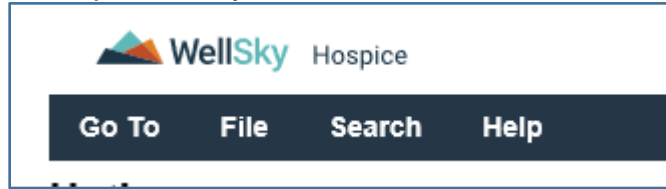
## Interactive Help tips

Here are a few things to keep in mind as you begin using Interactive Help:

- We're still in the process of building Interactive Help content based on commonly asked questions, new user training needs, etc. Right now, we've only built out content in WellSky™ Home Health and a little bit in WellSky™ Hospice, but we're always adding more. So **be on the lookout for new items from time to time!**
- On-page Interactive Help elements may look different depending on your screen resolution and how far you're zoomed in. We recommend you **use a standard screen resolution of 1024 or higher and keep your browser at 100% zoom.**

# Navigating WellSky

When you login to WellSky, you will see a blue banner across the top. This banner will change depending where you are in WellSky. For example, if you are within a patient's chart you will have more options on your banner.



## User Profile

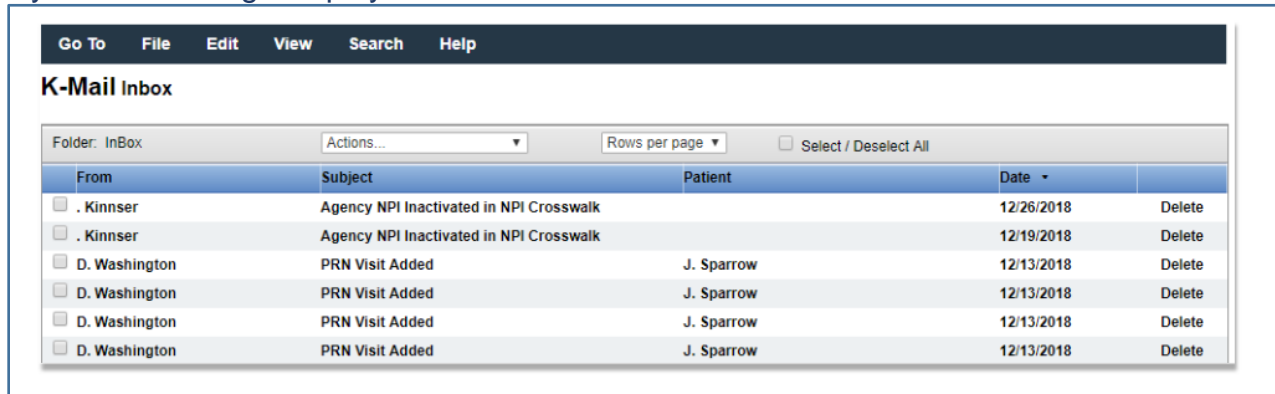
The user profile can be used to reset your password, electronic signature, update your address and your security questions. To Access Go To → **Profile**.

<p><b>Login Password</b></p> <p>Passwords must be at least 8 characters in length and contain at least three of the following: upper case letters, lower case letters, numbers, and special characters (e.g., % ^ * \$ @ #).</p> <p>Current Password: <input type="text"/></p> <p>New Password: <input type="text"/></p> <p>Confirm New Password: <input type="text"/></p> <p><b>Electronic Signature</b></p> <p>Current Signature: <input type="text"/></p> <p>New Signature: <input type="text"/></p> <p>Confirm New Signature: <input type="text"/></p>
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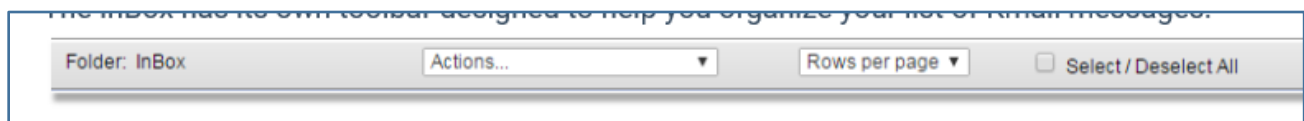
## K-Mail

To Access Go To → **InBox**. Your InBox is your HIPAA-compliant, intra-agency e-mail system. It utilizes Kmail™, WellSky™'s proprietary messaging system. Kmail is like email, but 100% HIPAA-compliant and only accessible through WellSky™ applications. This extra level of security allows you to exchange information about patients online.

**InBox page-** If you have ever used an e-mail client, the Kmail InBox has a familiar layout for message display:



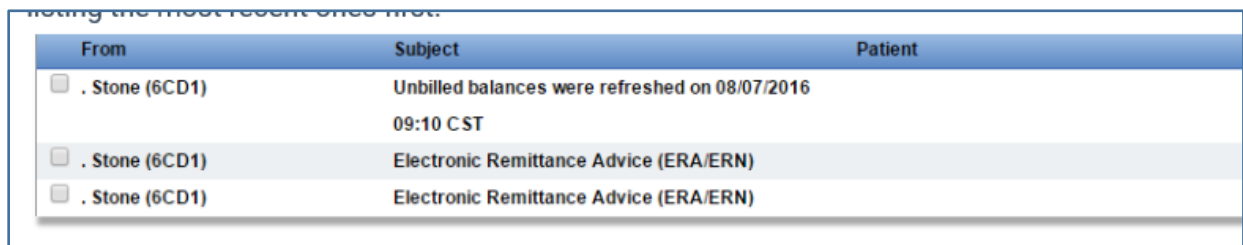
**Toolbar** -The InBox has its own toolbar designed to help you organize your list of Kmail messages.



With this toolbar, you can:

- Move Kmail to your Kmail folders
- Move Kmail to the trash folder
- Set how many Kmail messages display on the page
- Select or deselect all of your Kmail

**Kmail messages-**The primary purpose of the page, of course, is to display your Kmail messages. Messages are displayed chronologically, listing the most recent ones first.



Note that your InBox displays messages sent from your agency staff and coworkers, as well as automatically generated messages from your WellSky™ application.

You can actually sort your messages using the blue toolbar header. You can sort by:

- From (the message sender)
- Subject line
- Patient the message is regarding, if applicable
- Date the message was sent

**Kmail Recipient Groups-** Groups of related recipients can be identified and created; when you send a Kmail to this group, the Kmail is then automatically sent to all the recipients that are a part of that group. These are useful if you frequently communicate with groups of people at your agency.



**Create a Kmail message-**From the toolbar:

1. Click **File**, then select **New**, then select **Message** from the submenu.
2. Select **group(s) and/or individual recipient(s)**.
  - Place the mouse pointer over a group name to quickly view recipients in the group.*
    - If the group names are not visible, click **Show/Hide Groups** to view the listing.
    - If the recipient names are not visible, click **Show/Hide Address Book** to view active agency users.
3. Enter a **message subject** to be listed in the recipient's InBox.
4. Click **Attachment** to attach relevant electronic (scanned) documents.
  1. Click **Browse** under Attachment.
  2. Locate the **document** you wish to attach, click the **document name** to select it, then click the Open button.
  3. *The document location displays in the Browse field.*
5. Select a **patient name**, if applicable, from the Regarding Patient drop-down menu.
  - Selecting a patient name from the drop-down associates this message with the patient's electronic medical record.*
6. Enter the message to be sent to recipients.
7. Click **Send Message**.
8. **Results:** Your Kmail message is sent to your selected recipient(s).

**Delete a single message-** From the InBox page:

1. Click **Delete** on the same row as the message to be removed.

**Delete multiple messages-** From the InBox page:

1. Select one or more messages.
2. Click the **Actions...** drop-down menu, then select **Move to Trash**.

**Note:** Deleting a Kmail does not remove the message from the InBox of other recipients and the sender.

**Reply to a Kmail message-** From your InBox page:

1. Click a message to open the Kmail message.
2. Click the reply option you'd like to use:
  - o Reply: reply only to the message sender.
  - o Reply All: send a message to all recipients on the message.
3. Select additional recipients, if applicable.
4. Enter your reply message in the Message box before the original message(s).
5. Click Send.
6. **Results:** Your reply is now sent to the selected recipient(s).

**Forward a Kmail message-** From the InBox page:

1. Click the message subject to review the Kmail message.
2. Click Forward.
3. Select the forwarded message recipients.
4. Enter a forwarding message in the Message box before the original message(s).
5. Click Send.
6. **Result:** The message is now forwarded to the selected recipient(s)

**Patient chart integration-** Patient-related messages are automatically attached to that patient's chart, instantly documenting your coordination of care. When creating a Kmail message, you can associate it with a patient using the **Regarding Patient** drop-down selection.

Subject: Test patient message

Attach a File: Choose File No file chosen

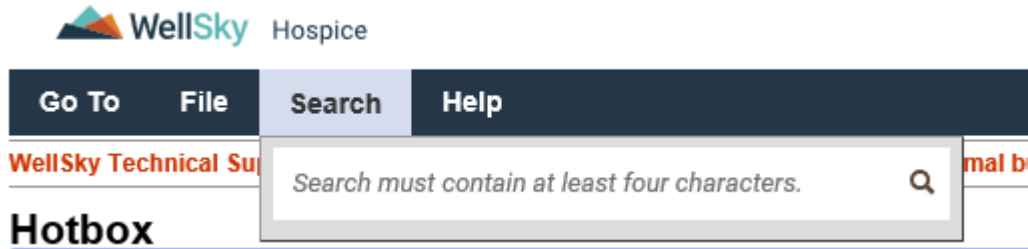
Regarding Patient: Duh (A25F), Yedda (2EB3)

**After the Kmail is sent, it is automatically added to the patient's Messages page, which is accessible from their chart.**

Patient Notes/Messages			
Duh (A25F), Yedda (2EB3)			
From	Subject	Received	
Barthram (8765) Mcintosh (14D1)	Test patient message	08/17/2016	Remove from Patient
Evanee (C5C0) Higgins (43A8)	OT frequency	08/04/2016	Remove from Patient
Redman (1FFA) IHansen (1A97)	Lab Results Sorci	08/02/2016	Remove from Patient
Iwdael (04CC) Mueller (ADD6)		07/24/2016	Remove from Patient
Dearbourne (D640) IBrennan (EF13)		07/10/2016	Remove from Patient
Evanee (C5C0) Higgins (43A8)		06/13/2016	Remove from Patient

## Search

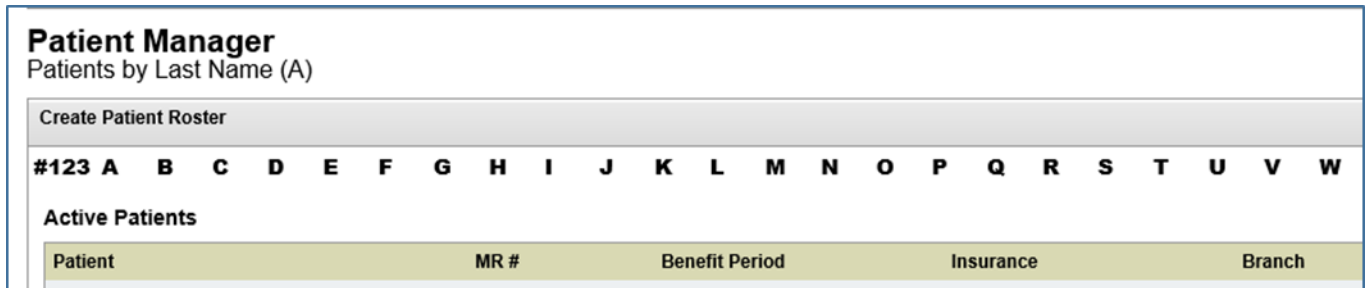
You can use the **Search** option to search for patients



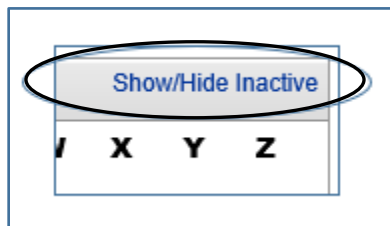
## Patient Manager

Go to → **Patient Manager**.

The patient manager is a list of all patients in alphabetical order. The patient manager displays the patient's name, medical record number (MRN), benefit period, insurance, and branch. The branches at Carroll Hospice are Home Hospice, Facility Based Hospice Care, IPU and Palliative Care.



The patients who initially appear are active patients. To see inactive patients, those who have died or been discharged click on the **Show/Hide Inactive** link.



One this link is clicked; **inactive patients will appear** in the patient manager.

Active Patients			
Patient	MR #	Benefit Period	Insurance
<u>1.</u> Banana, Test		04/14/20-07/12/20	Palmetto GBA

Inactive Patients

Patient	MR #	Benefit Period	Insurance
<u>1.</u> Billings, Debi	2569	06/21/19-07/21/20	Palmetto GBA
<u>2.</u> Bond, James	1987	09/21/19-10/21/20	Palmetto GBA
<u>3.</u> Bunny, Bugs	1468	08/12/19-08/12/19	Palmetto GBA

1 Items Per Page 25 ▾

To open a patient's medical record, click on their name within the patient manager.

### Patient Manager

Patients by Last Name (B)

Create Patient Roster

#123 A B C D E F

#### Active Patients

Patient
<u>1.</u> Banana, Test

# Navigating the Benefit Period Manager and/or the Bereavement Period Manager

In WellSky, the patient manager is separated into benefit periods. When patients are first admitted to hospice, they enter a 90-day benefit period, then another 90-day, followed by unlimited, subsequent 60-day periods\*. When a patient dies, they enter a 13- month bereavement period.

\*The 90-90-60 benefit period model is for patient's who have Medicare, if a patient has another type of insurance, they may have different benefit period lengths in WellSky and require additional insurance authorization.

## Benefit Period Manager

When you open an active patient's chart their current benefit period will open.

The screenshot displays the Benefit Period Manager interface. At the top, there is a navigation bar with a '<< Previous Benefit Period' button (labeled C), a date range '06/02/2020 - 07/31/2020 (15)' (labeled A), and a 'Discipline' bar (labeled B) with tabs for Nursing, Physician, MSW, Chaplain / Counselor, Volunteer, Aide, IDG/POC, Orders, Comm, and Misc. Below the navigation bar, there are three calendar views for June 2020, July 2020, and August 2020. The June and July calendars show scheduled tasks (light blue) and completed tasks (dark blue). The August calendar is a grid. A legend below the calendars identifies the symbols: a white square for 'Benefit Period Day', a light blue square for 'Scheduled Task', a dark blue square for 'Completed Task', and a yellow square for 'Missed Visit'.

- A. Current benefit period date range, in parenthesis the number of benefit periods.
- B. Discipline tabs: calendar shows scheduled tasks, completed tasks, and missed visits per discipline.
- C. Use to navigate to previous benefit periods.



04/03/2020 - 06/01/2020 (14)

<< Previous Benefit Period
Next Benefit Period >>

April 2020

Sun	Mon	Tue	Wed	Thu	Fri	Sat
					3	4
5	6	7	8	9	10	11
12	13	14	15	16	17	18
19	20	21	22	23	24	25
26	27	28	29	30		

May 2020

Sun	Mon	Tue	Wed	Thu	Fri	Sat
					1	2
3	4	5	6	7	8	9
10	11	12	13	14	15	16
17	18	19	20	21	22	23
24	25	26	27	28	29	30
31						

June 2020

Sun	Mon	Tue	Wed	Thu	Fri	Sat
	1					

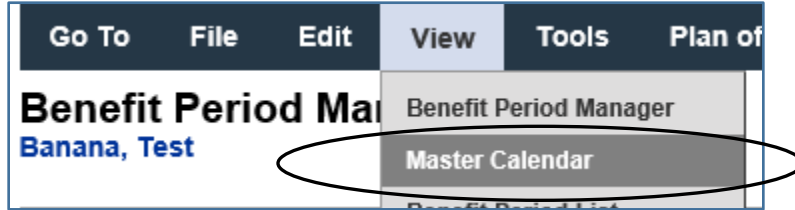
Benefit Period Day     
  Scheduled Task     
  Completed Task     
  Missed Visit

Nursing
Physician
MSW
Chaplain / Counselor
Volunteer
Aide
IDG/POC
Orders
Comm
Misc

**Use to navigate through the benefit periods**

# Master Calendar

The benefit period shows a calendar of each discipline, if you want to look at a calendar which shows every discipline visit in one snapshot select View → **Master Calendar**.



Master Calendar							
Banana, Test ()							
	Nursing	Physician	MSW	Chaplain/ Counselor	Volunteer	Aide	IDG Meeting
Scheduled							
Completed							
							Missed Visit
01/15/2020 - 04/13/2020							
Sun	Mon	Tue	Wed	Thu			
			01/15 Continuous Care Note Aide Care Plan	01/16			
01/19	01/20	01/21	01/22	01/23			
01/26	01/27	01/28	01/29	01/30			

## Quick View of Patient Information

Within the benefit period manager, you can click on the patient's name for a **quick snapshot of the patient's information.**

**Benefit Period**  
**Einstein, Albert A.**

**Patient Information**

**Basic Information**

First Name: Albert  
Last Name: Einstein  
Branch: Anthony Murphy Hospice  
Date of Birth: 07/01/1930  
MRN:  
Email:  
Primary Language: English  
Primary Religion:

July 2

Sun	Mon	Tue	Wed
			3
7	8	9	10
14	15	16	17
21	22	23	24
28	29	30	31

## Review of Tabs

Within the benefit period manager, tabs are used to separate different discipline's documentation.

**Nursing:** RN and LPN Documentation.

**Physician:** MD and NP Documentation.

**MSW:** Social Worker Documentation.

**Chaplain/Counselor:** Chaplain and Bereavement Documentation.

**Volunteer:** Volunteer Documentation.

**Aide:** Hospice Aide Documentation.

**IDG/POC:** IDG Meeting Snapshot, Plan of Care Orders.

**Orders:** Free Text Orders (not included in POC or medication profile).

**Claims:** Insurance Claims (not everyone has access to this tab).

**Comm:** Communication and Triage Notes.

**Misc:** Other Visits (PT, ST, etc.), uploaded documents (Consents, History and Physical, MOLST/POLST, Advanced Directives, etc.).

Underneath each tab is a yellow bar which displays “Task” such as “RN Initial Assessment,” “Assigned” the clinician the task is assigned to and/or the clinician who documented on the patient, “Target Date” the date the task is assigned, “Visit Date” the date the visit/task occurred, “Status” the status of the tasks such as saved, not started, etc., “Print View,” and “Details” this can be used to edit details of the task, and “Delete.”

Nursing	Physician	MSW	Chaplain / Counselor	Volunteer	Aide	IDG/POC	Orders	Cclaims	Comm	Misc
Task ?		Assigned	Target Date	Visit Date	Status			Delete		
1. RN Initial Assessment		N. Chitest	07/06/2019	07/06/2019	Missed Visit (Approved) (MV)			Print View	Details	<input type="checkbox"/>
2. RN - Skilled Nursing Visit		N. Chitest	07/09/2019	12/23/2019	Submitted with Signature			Print View	Details	<input type="checkbox"/>

## Viewing Visit Notes

Next to the task, select “Print View.”





Nursing	Physician	MSW	Chaplain / Counselor	Volunteer	Aide	IDG/POC	Orders	Cclaims	
Task ?		Assigned	Target Date	Visit Date	Status			Print View	
1. RN Initial Assessment		S. Chitest	01/15/2020	06/23/2020	Saved			Print View	

A new window will open where the note can be viewed and/or printed.


<b>RN Initial Assessment</b> : 06/23/2020		<b>Anthony Murphy Hospice</b>	
Banana, Test ( )		2500 Bee Caves Road , Building 2, Suite 300	
Date of Birth: 11/20/1940		Austin , TX 78746	
		Phone: ( ) -	
		Fax: ( ) -	
<b>Time In / Time Out</b>			
Time In: 15:00		Time Out: 16:00	Visit Date: 06/23/2020
<b>Vital Signs</b>			
<b>BP:</b>	<b>Heart Rate:</b>	<b>Respirations:</b>	<b>O2 Sat:</b>
During 220 / 94	During 84	During 26	During 90% Room Air via
Temperature: 97.8 Taken: Temporal			
Comments:			
<b>Height and Weight</b>			
Height (feet & inches) 6 4		Is the patient able to be weighed? <input type="checkbox"/> Yes <input type="checkbox"/> No	
Mid-arm Circumference (MAC) in cm		Weight (lbs) 185	
		Body Mass Index (BMI)	
Reported Weight Changes Gain Pounds in the past Day(s)			
<b>Diagnosis Information at Admission (ICD-10)</b>			
<b>Terminal Diagnosis:</b> K7031 - Alcoholic cirrhosis of liver with ascites		<b>Is this diagnosis related to terminal diagnosis?</b>	
Comorbidity 1: I8501 - Esophageal varices with bleeding		<input checked="" type="checkbox"/>	
Comorbidity 2: M6250 - Muscle wasting and atrophy, not elsewhere classified		<input checked="" type="checkbox"/>	

## Viewing Uploaded Documents

Under the Misc. Tab documents such as consents, history and physical, MOLST/POLST, and advanced directives. When a document(s) is attached to a task an icon will appear next to the task.

<u>N</u> ursing	<u>P</u> hysician	<u>M</u> SW
<b>Task ?</b>		
1. History & Physical		
2. Insurance		
3. Other Document		
4. MOLST/ADV DIR		

To view the attached document, click on the icon then a list of the attached documents will appear, if you click the file name the document will open.

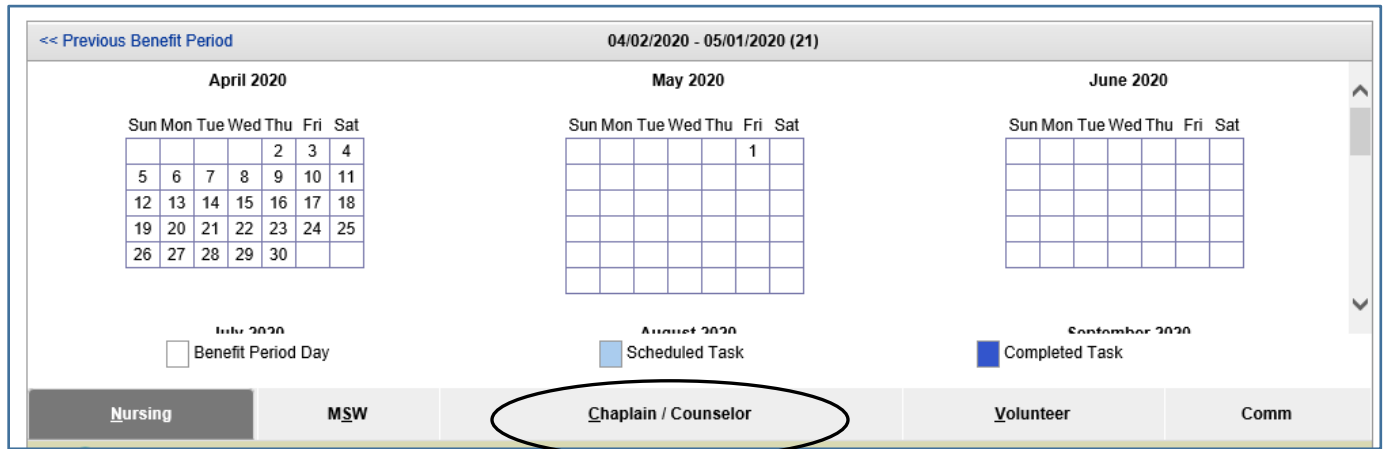
<u>N</u> ursing	<u>P</u> hysician	<u>M</u> SW	<u>C</u> haplain / Counselor	<u>V</u> ol
<b>Task ?</b>			<b>Assigned</b>	<b>Target Date</b>
1. History & Physical			t. test	06/06/2020
<b>Task</b>		<b>Assign</b>	<b>File Name</b>	
Eligibility Check <input type="button" value="v"/>		Admin,	Test H and P.docx	
Eligibility Check <input type="button" value="v"/>		Admin,		

You can also select **Print View** which will open another window which has a link to the attached document.

<b>Banana, Test</b>
<b>History &amp; Physical</b>
Document
<b>Attachments</b>
Attachment Name
<a href="#">Test H and P.docx</a>

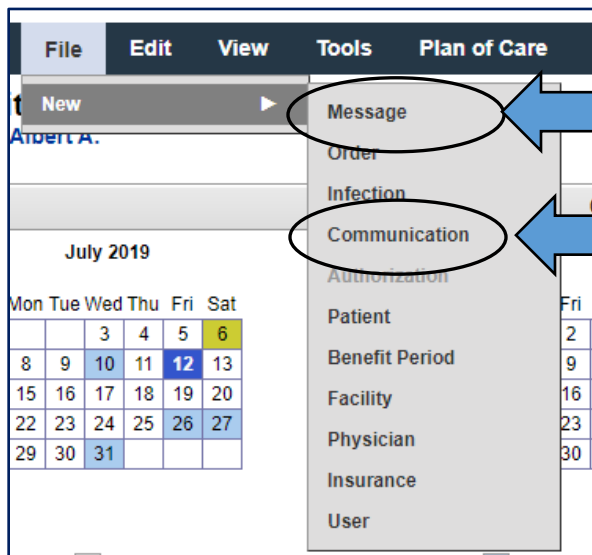
## Bereavement Period Manager

When you open an inactive patient's chart their bereavement period will populate navigating the bereavement period is the same as navigating the benefit period manager. The bereavement documentation is found under the chaplain/counselor tab. There are less discipline tabs in the Bereavement Period Manager.



## Navigating the Task Bar in a Benefit Period Manager

### File



Use to send K-Mail Pertaining to a Specific Patient **REMINDER**: The message will attach to the medical record.

Document pt/family/CG communication, which appears under the comm. tab.

## Edit-> Patient

From the edit patient screen, you can edit patient's demographic, emergency contact, advanced directive, funeral home, and pharmacy information. Additionally, you can edit patient flags and view comments and any attachments that were updated when the patient was referred to Carroll Hospice.

**Comments**

**Attachments**

No files uploaded.

No file chosen

**Patient Flags** should be updated to reflect a patient's current status, they should be reviewed frequently for accuracy, to update them check or uncheck the appropriate flags and hit save.

**Patient Flags**

<input checked="" type="checkbox"/> ASPIRATION PRECAUTIONS	<input checked="" type="checkbox"/> BLEEDING PRECAUTIONS	<input type="checkbox"/> COMMERCIAL INSURANCE	<input type="checkbox"/> CONTACT PRECAUTIONS
<input type="checkbox"/> COVID-19 Positive	<input checked="" type="checkbox"/> FALL RISK	<input type="checkbox"/> FULL CODE	<input type="checkbox"/> IDP
<input type="checkbox"/> INTAKE FOLLOW-UP	<input type="checkbox"/> ME CASE	<input type="checkbox"/> OXYGEN IN USE	<input type="checkbox"/> PA PATIENT
<input type="checkbox"/> PAIN PROTOCOL	<input type="checkbox"/> PENDING PATIENTS	<input type="checkbox"/> Positive Coronavirus screen	<input type="checkbox"/> REFUSING VISITS
<input type="checkbox"/> SEIZURE PRECAUTIONS	<input checked="" type="checkbox"/> STANDARD PRECAUTIONS	<input checked="" type="checkbox"/> TRIAGE CODE 1	<input type="checkbox"/> TRIAGE CODE 2
<input type="checkbox"/> TRIAGE CODE 3	<input type="checkbox"/> VETERAN		

**Comments**

**Attachments**

No files uploaded.

No file chosen

## Edit-> Benefit Period

Under the benefit period the IDG Assignment can be updated. If you are assigned to a patient, make sure the IDG assignment reflects this. The purple sticky can be updated here, do not forget to enter the date you entered the comment.

Facility- Last Name Letter A-K= **Team A**

Facility- Last Name Letter L-Z= **Team B**

Home- Last Name Letter A-K= **Team C**

Home- Last Name Letter L-Z = **Team D**

Dove= **Team E**

### Interdisciplinary Group Assignment

Physician*	Admin A	Chaplain / Counselor*	Chitest B
Registered Nurse (RN)*	Chitest N. (CRNP)	Volunteer Coordinator*	Chitest S
Social Worker (MSW)*	Admin A	IDG Team	N/A
Aide (HHA)	Chitest H. (HHA)		

**Update assignments here.**

### Inactivate Benefit Period

Inactivate Benefit Period

**Do not inactivate benefit periods!**

### Comment

4/11/20: Pt is a DNR- B, MOLST in home on the refrigerator.  
5/15/20: Pt tested positive for COVID-19 on 5/15/20, isolation precautions implemented.  
5/31/20: COVID-19 precautions discontinued, pt asymptomatic for 10 days and negative test results received on this day.

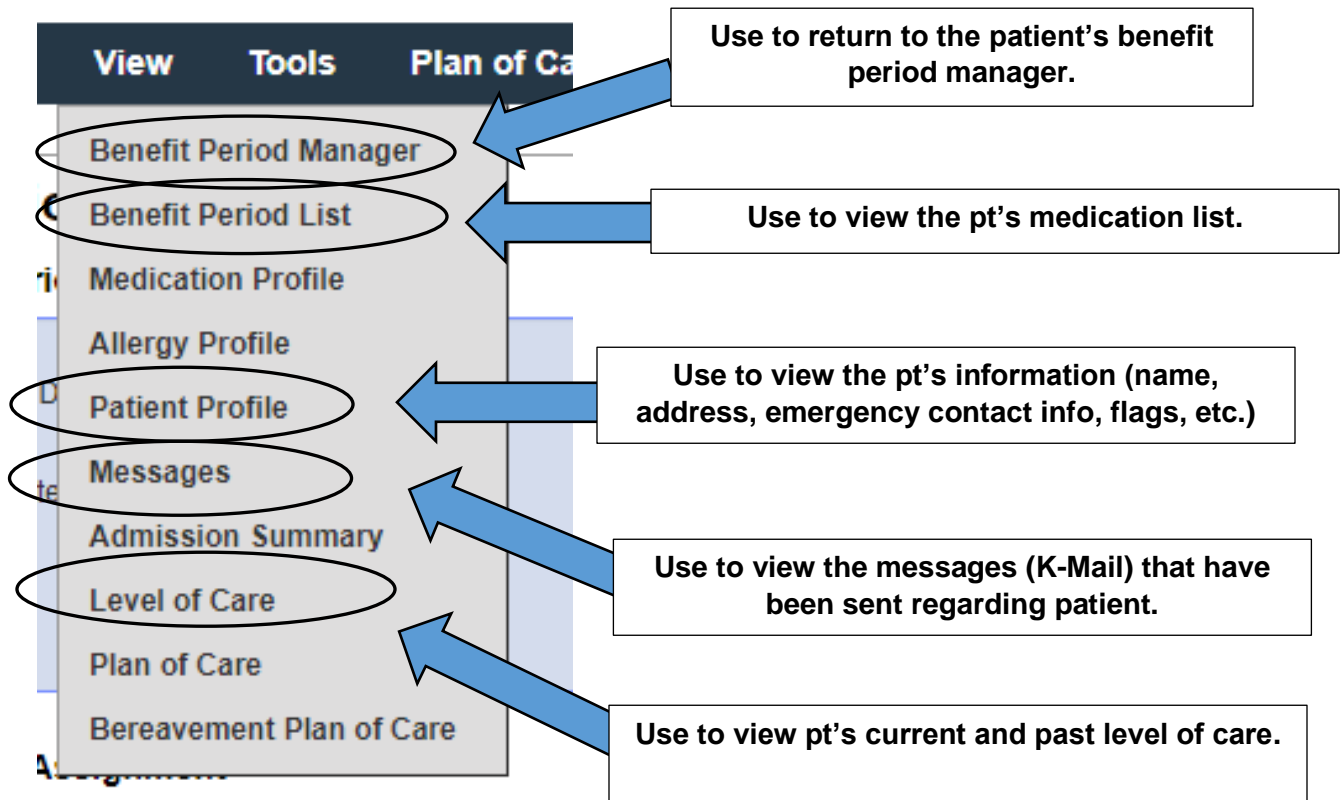
**Comments here.**

**Don't forget to hit save & submit when you make any changes!**

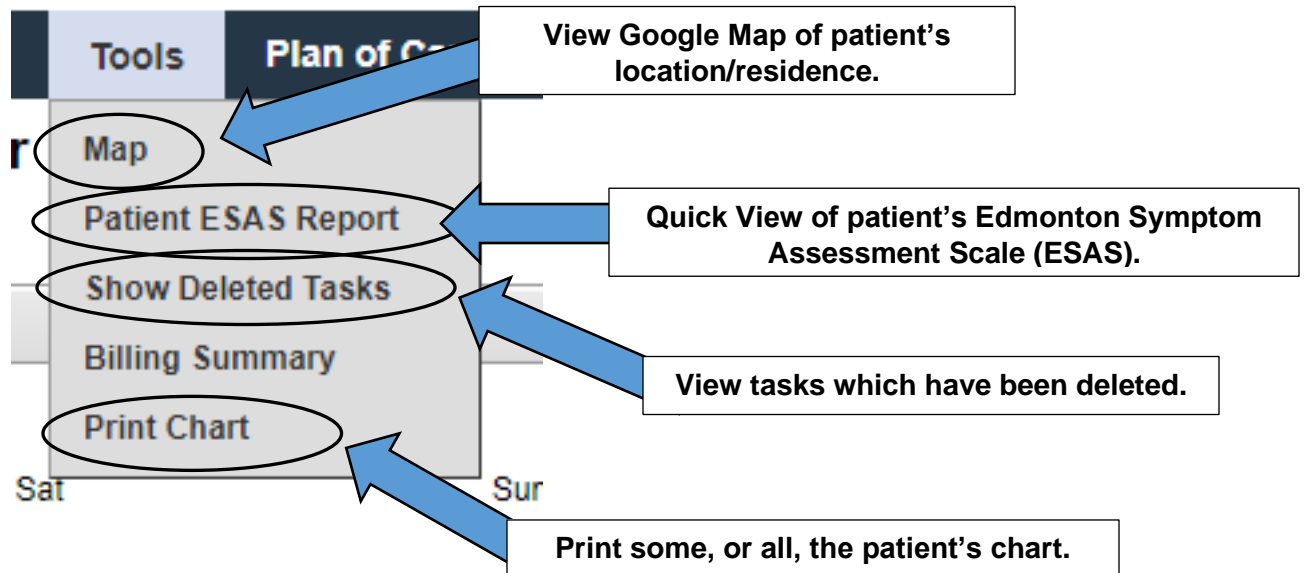
Save & Submit



## View



## Tools



# Plan of Care

The plan of care is used to guide patient's care. It is updated frequently, at minimum every two weeks during a patient's IDG. Below are directions for navigating the patient's plan of care. If you are an IDG member you will require further instructions on using the Plan of Care module.

## Coordination of Care

This tab lists the care and services provided to the patient. The care/services provided to each patient should be checked off with a description in the box.

## Frequency

This tab lists the frequency at which care and services are being provided. For example, the nurse is visiting the patient 2-3 times a week, hospice aide 3 times a week, social work every 2 weeks, and chaplain every 2 weeks.

### Important Notes:

- Pt's in the Inpatient Unit (IPU) are not required to have visit frequencies.
- Hospice Aides cannot have visit frequency ranges.

## Problems

This tab lists the patient's past and active problems. This may include difficulty breathing, pain, psychosocial issues and/or spiritual distress.

## IDG Communication

This tab shows the history of IDG notes which have been entered on the patient. To view the notes, click the + Interdisciplinary Communication History.

**+ Interdisciplinary Communication History**

## Work Log

This tab shows the history of any changes/updates to the plan of care.

# Tasks

## Scheduling Tasks

Tasks, such as clinical assignments, can be assigned, viewed, and edited on the patient's Benefit Period Manager page. Scheduled tasks are accessed via the assigned user's HotBox.

From the patient's benefit period manager:

1. Select the **correct discipline tab**.
2. Click the task's **expected date(s) of service or completion** on the calendar. (Upon selection, the date is displayed in the schedule tasks list).

August 2013						
Sun	Mon	Tue	Wed	Thu	Fri	Sat
			14	15	16	17
18	19	20	21	22	23	24
25	26	27	28	29	30	31

3. Scroll down to the **schedule tasks** list.
4. Select the **task type** from the dropdown list under schedule tasks.

Schedule Tasks	
Task	Assign to:
Discharge - Dead	clinician, hospice new
Pain Assessment	clinician, hospice new
RN Initial Assessment	clinician, hospice new
Verbal Certification	clinician, hospice new
Verbal Recertification	clinician, hospice new

5. Confirm (or assign) the clinician for the task in the **Assign To: dropdown**.
6. Repeat, as desired, to schedule multiple tasks.
7. *If you add a task by mistake, simply click the Clear option in the appropriate row to remove it. You can also click Clear All to remove all pre-scheduled tasks if needed.*
8. Click the **Insert/Update Task(s)** button.

Schedule Tasks			Switch to Outlier Entry
Task ?	Assign to:	Date	Clear All
Bereavement Assessment	Martin, Gary	7/1/2016	Clear
RN Initial Assessment	Martin, Gary	7/2/2016	Clear
RN Initial Assessment	Martin, Gary	7/2/2016	Clear
RN Initial Assessment	Martin, Gary		Clear

## Managing Tasks

Task information, including target date, assigned clinician, and current location, can be edited from Benefit Period Manager.

### Edit a task's scheduled target date

From the patient's Benefit Period Manager page:

1. Click the Target Date for the task you wish to edit.
2. Enter the new date into the Target Date field.

Target Date	Status
08/14/2013	Not Yet Due

Target Date
08/14/2013 <input type="text"/> <input type="button" value="x"/> <input type="button" value="Calendar"/>

3. You can also click the calendar icon to launch a date picker.
4. Click the Insert/Update Task(s) button.
5. **Results:** The task is updated with the new Target Date

### Edit episode task details information

From the patient's Benefit Period Manager page:

1. Click Details on the task you wish to edit.

Status		Details	Delete
Saved	Print View	Details	<input type="checkbox"/>
Saved	Print View	Details	<input type="checkbox"/>

2. Review and/or edit the task detail information.

Task	Status	Target Date	Billable	
Pain Assessment	Saved	08 / 12 / 2013	No	
Missed Visit	External	Visit Date	Time In	Time Out
<input type="checkbox"/>	<input type="checkbox"/>	08 / 12 / 2013	10 : 00	13 : 00
Clinician	Current Location	Surcharge	Associated Mileage	
clinician, hospice new	clinician, hospice new	\$ 0.00	0 miles	
Comments				

3. Multiple fields may be edited before changes are saved. Hover your mouse, without clicking, over the (?) tooltip for information about that particular section.
4. **Important Note:** When changing a clinician, you need to edit the "clinician" and the "current location" – so the task is assigned to the clinician's hotbox
5. Click the Update Task button.
6. **Results:** Changed target dates, clinicians, and locations are reflected in the patient's schedule and related HotBox listings.

## Deleting and Restoring Tasks



**There is no confirmation warning when you delete a task!** So be sure you're deleting the correct task(s) before clicking Insert/Update Task(s).

### Deleting a task

From the patient's Benefit Period Manager page:

1. Select the task discipline.
2. Select Delete for the desired task.

Status			Delete
Saved	Print View	Details	<input checked="" type="checkbox"/>
Not Yet Due		Details	<input type="checkbox"/>

3. Click the Insert/Update Task(s) button.
4. **Results:** Upon deletion, the task is removed from the chart as well as from the assigned user's HotBox listing.

### Restore a deleted task

From the patient's Benefit Period Manager page:

1. Click Tools from the toolbar.
2. Select Show Deleted Tasks.
3. Click Details for the task you wish to restore.

Target Date	Status		
08/26/2014	Not Yet Due		Details
08/28/2014	Deleted	Print View	Details
09/01/2014	Not Yet Due		Details

4. *Previously deleted tasks are displayed with a pink background.*
5. Click **Tools** from the WellSky toolbar on Task Details page.
6. Select **Reopen Task**.
7. **Results:** The task is restored with a status of reopened.

## Yellow sticky notes

Yellow sticky notes, or task comments, are located within the Details section of tasks and are generally used to document extra details or information regarding a particular visit. These task specific comments can be added or edited at any time, regardless of the task's status, and do not appear within the Print View of the visit note.

During the review process, a Quality Assurance (QA) person is able to make comments for correction within the yellow comment box prior to returning it to the clinician.

Comments made will appear as a yellow sticky note icon within the assigned clinician's HotBox, the QA Manager box, and the patient's Episode Manager page and can be reviewed by hovering your mouse cursor over the icon. **Unlike tasks, however, once a yellow sticky note has been deleted, it cannot be restored.**

Adding a task comment, commonly referred to as a "yellow sticky note", enables your clinical and administrative staff to provide information relevant to a scheduled task. Task comments communicate details or additional information for a particular task or scheduled visit, e.g., types of labs to draw, family to be present at visit. Task comments can be added either before, during or after task completion.

### Add a task comment

To add a comment (yellow sticky note) to a task, from the patient's Benefit Period Manager page:

1. Click Details on the task for which you wish to add a comment.

Task	Assigned	Target Date	Status			Delete
1. RN Initial Assessment	A. Admin	08/13/2013	Completed	Print View	<a href="#">Details</a>	<input type="checkbox"/>
						<input type="checkbox"/>

2. Enter text directly into the Comments field.
3. Click Update Task.
4. Once a task comment is saved, it is automatically attached to the task and can be viewed from your HotBox, QA Manager, the patient's chart, and several reports.

### Edit a task comment

To edit a task comment, from the patient's Benefit Period Manager page:

1. Click Details on the task for which you wish to add a comment.
2. Enter text directly into the Comments field.
3. Click Update Task.


## Purple sticky notes

The purple sticky note is available under a patient's Edit Episode page and is used for comments specific to the patient and their benefit period as a whole. These comments can include information such as the patient's limitations, details about their living situation to be aware of. (i.e., patient has a large dog), or additional caregiver contact information. Comments entered into the purple section are, by default, added to all tasks within the patient's episode and appear within the HotBox of all clinicians and therapists assigned to the patient as a purple sticky note icon. All caregivers assigned to the patient can review the episode comment by hovering their mouse cursor over the purple sticky note icon. **Much like the yellow sticky notes, purple sticky note comments can be added or edited at any time but cannot be retrieved once deleted.**

Adding a benefit period comment enables your clinical and administrative staff to provide patient or home condition information relevant to everyone assigned to the patient. Benefit period comments may be used to communicate general information, e.g., primary caregiver contact info, patient comprehension limits or preferred educational method, presence of animals in the home, or conditions impacting patient behavior.


### Add and edit a benefit period comment

From the patient's Benefit Period Manager page:



1. Click Edit in the toolbar.
2. Select Benefit Period.
3. Add or edit text in the purple Comments field.
4. **Important Note: When entering comments place the date you enter a comment and do not erase other team member's comments.**
5. Click the Save & Submit button
6. **Results:** Once an episode comment is saved, it is automatically attached to all benefit period tasks and can be viewed in QA Manager and the HotBox via the  "purple sticky note" icon.

### View a benefit period comment

To view benefit period comments:

1. Click Go To on the toolbar.
2. Select HotBox or QA Manager.
3. Place your mouse cursor, without clicking, on the purple sticky icon for the desired patient task. 

4. **Results:** The benefit period comment text is displayed.

<input type="checkbox"/>	Patient	Task	Status	Clinician	Current Location
Fri 12/20/2013					
<input type="checkbox"/>	 Roman (00F8), Bay (425E)	Aide Supervisory Visit	Submitted with Signature(MV)	Garrett (39C3), J.	<div style="border: 1px solid black; padding: 2px; background-color: #fff9c4;">Benefit Period Comment Franks (6558), J. This is a benefit period comment. </div>
Mon 12/23/2013					



# HotBox

The HotBox is a personal list of all tasks assigned to you for completion. Think of it as your own "to-do" list. The HotBox may include, for example, scheduled evaluations, nursing progress notes, assessments, or supervisory visits. By default, the oldest items are at the top of the page and the newest items are at the bottom; however, you can filter, group, or sort your HotBox to gain easy access to your most important tasks.

The screenshot shows the HotBox interface with the following elements:

- Hotbox** header with a **RESET FILTER** button.
- Tasks** dropdown menu set to **All**.
- Date range** input fields showing **07/07/2020** to **08/07/2020** with calendar icons and an **Apply filters** button.
- Informational text: **Visits in italics have been added or edited within the past 48 hours.** and **Visits in red** occurred in benefit periods that have already ended.
- A callout box with the text: **Sort by Date Range**.
- Summary text: **Anthony Murphy Hospice, all task types, from 07/07/2020 to 08/07/2020**.
- Footer controls: **Show 25 entries**, **Grouped by Date**, and **Filter by search:** with an input field.

**Use to group tasks date  
by date, patient, task  
type, or status**

## Notes

- Remember that patients whose names appear in red are patients who have visits in the hotbox that are in episodes that have already ended.
- Patients whose visits were just recently added or modified within the last two days appear with their names bolded.

## HotBox Features

If you have incomplete or new tasks, the HotBox page will be displayed immediately after you log in. To view and complete the task, click the patient's name next to the assigned task. The HotBox looks seven days into the future for task selection.

## Quick Patient Profile

The Quick Patient Profile icon gives you a quick look at the patient's profile. Although this information can vary based on your WellSky™ application, it typically includes the patient's MRN, address, and contact information.

A screenshot of a 'Quick Patient Profile' card. At the top, it says 'Medicare, Patient' with a person icon. Below that is the title 'Patient Information'. The card lists the following details: Insurance: Palmetto GBA, MRN: 8, Address: HARRISONBURG, VA 22801, and Phone: (555) 222-1234. At the bottom, it says 'Billing, External vs.' with a person icon. A hand cursor is pointing at the MRN field.

## Documenting on a Task

From your HotBox, open your assigned task by clicking the patient's name or the assigned task.

A screenshot of a task list in a 'HotBox'. The date 'Fri 08/07/2020' is shown at the top. Below it is a dropdown menu with 'Fri 08/07/2020' selected. The main list contains one entry: 'Brown, Eddie' (with a person icon) for the task 'Chaplain / Counselor Visit', which is 'Not Yet Due'. A black oval highlights the patient name and task description. At the bottom, it says 'Showing 1 to 4 of 4 entries'.

Fill in note as appropriate, the note cannot be saved until you fill in any required documentation identified with a cranberry corner.

A screenshot of a 'Chaplain / Counselor Visit' documentation form. The title is 'Chaplain / Counselor Visit' and the patient is 'Brown, Eddie ()'. There are three input fields: 'Time In:', 'Time Out:', and 'Visit Date:'. The 'Time In:' field has a red triangle in the top right corner, which is circled in black. The 'Visit Date:' field has a calendar icon. Below these fields is a section titled 'Documentation and Travel Time' with several empty input boxes.

If you're not done documenting but you can hit "save" to save your work and return to it later.



A screenshot of a web form interface. The form has a light gray header bar and a green body. In the top right corner of the header bar, there are two buttons: "Save" and "Submit". Both buttons are circled in black. Below the header bar, there are two input fields: "Electronic Signature:" followed by a white text box and a blue link "Forgot My Electronic Signature"; and "Signature Date:" followed by a white text box containing the placeholder "mm/dd/yyyy" and a calendar icon.

When you have completed your documentation, enter your electronic signature, the date and hit submit.



A screenshot of the same web form interface as above. In this version, the "Submit" button in the top right corner of the header bar is circled in black. The "Save" button is not circled. The rest of the form, including the "Electronic Signature:" and "Signature Date:" fields, is identical to the previous screenshot.