Introduction to

WellSky

Training Guide

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 or Google Chrome. *Do not use 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 you have questions about Documentation?

Do not contact WellSky Help, please contact:

BridgingLife's WellSky Help User Group (wellskyhelp-ug@chcorg.onmicrosoft.com) during normal business hours (8am-4:30pm Monday-Friday) or the Administrator on Call (AOC) after hours.

WellSky Help/Support Options

E-mail – Please send questions or non-critical issues to enterprise.support@wellsky.com. Expect a 1-day response time.

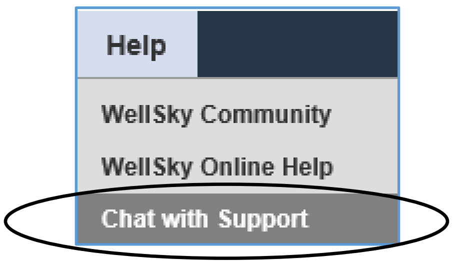
Call – BridgingLife staff will be placed in a priority queue when calling 877-399-6538 for support.

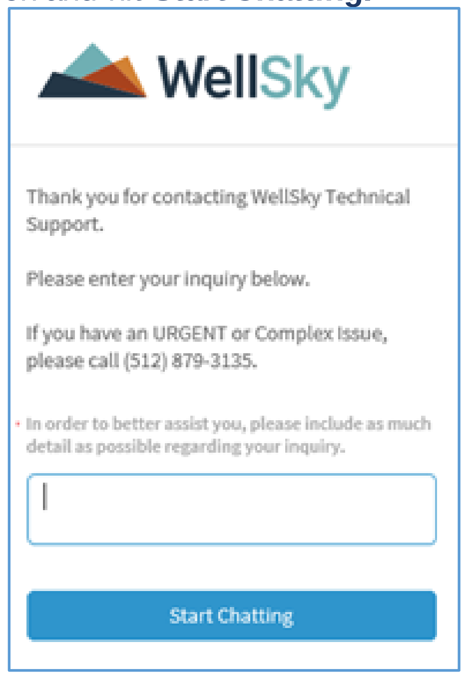
- Before calling, Go To -> Profile and enter the phone numbers that you will call from to WellSky Support. This will flag WellSky when you call that your number is a priority call.

If you have support issues, please let the WellSky User Group know so that we can follow up with WellSky.

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

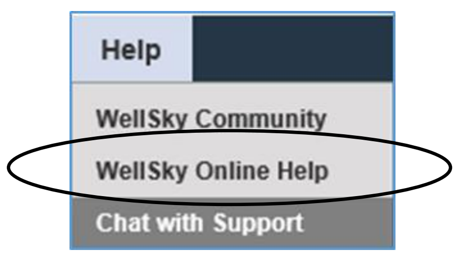
- To get to the chat, login to WellSky and go to Help→ **Chat with Support**. Once you select Chat with Support a chat box will pop up in the bottom right hand corner of your screen. Type your question and hit **Start Chatting.**





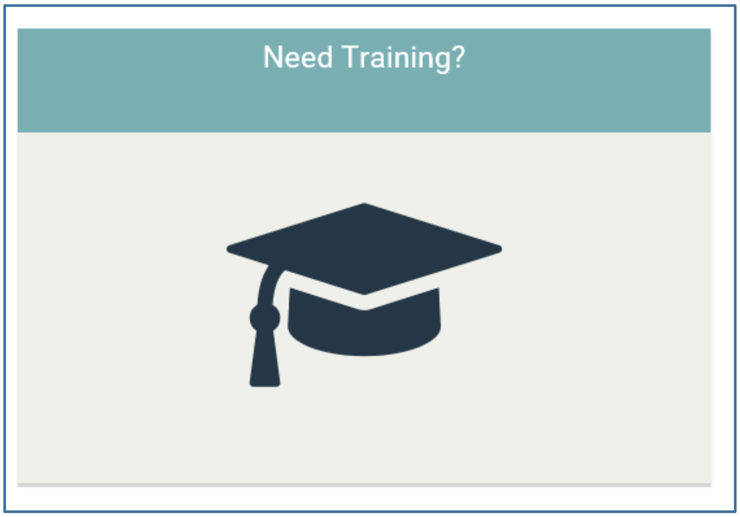
Online Help –

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.

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?

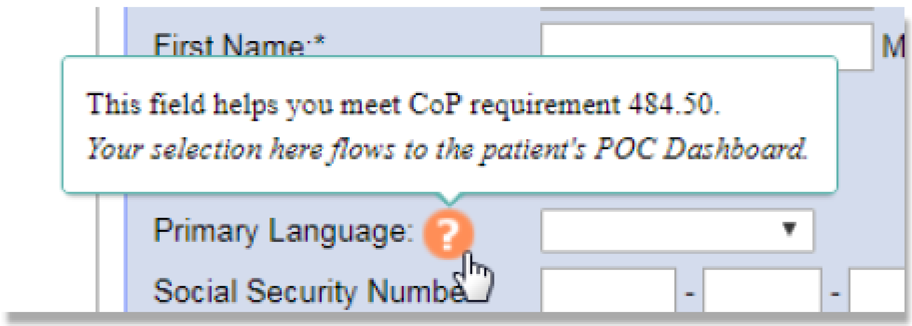
Interactive Help is kind of like an in-application tour guide. Powered by WalkMe, Interactive Help overlays your WellSky application and offers up helpful tips and information. It consists of several types of help elements (tips, process walkthroughs, pop-ups, links to resources, etc.) that are all aimed 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?

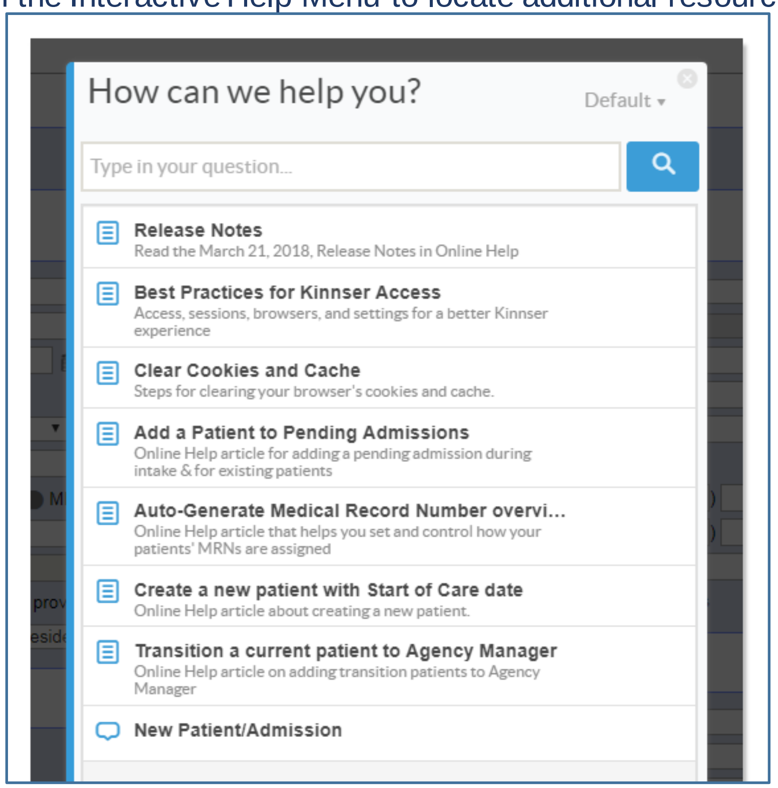
While Interactive Help is a great new addition to our learning and help offerings, it by no means replaces Online Help. Because of its nature, Online Help can accommodate way more information than Interactive Help. So, if there's something you need but it's not readily available via Interactive Help, 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?

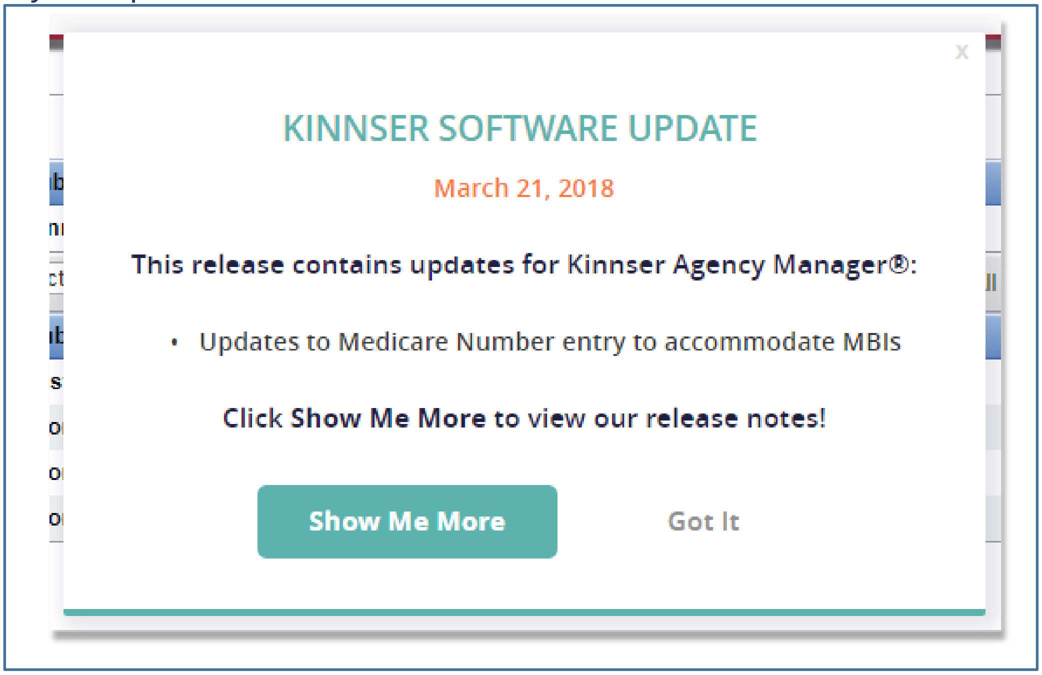
Sometimes you'll see Interactive Help elements right on your application page, like the tips below which appear when you hover over the help icons.



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 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.



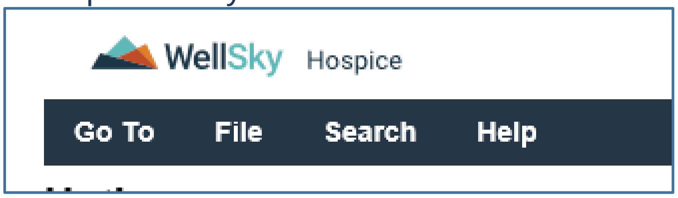
Interactive Help tips

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**.

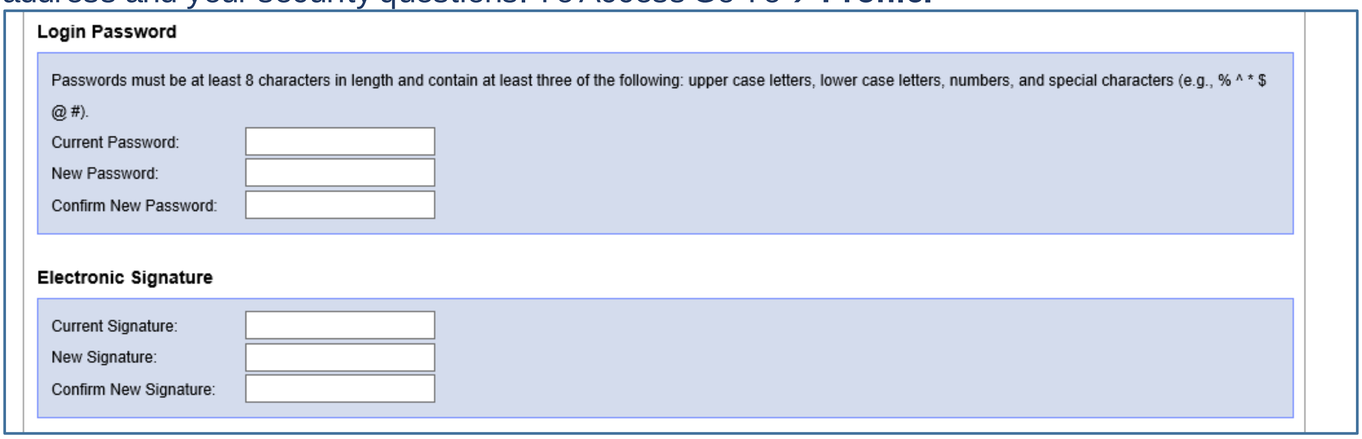
Navigating WellSky

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.**


Login Password

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., % ^ * $ @ #).

Current Password:
New Password:
Confirm New Password:

Electronic Signature

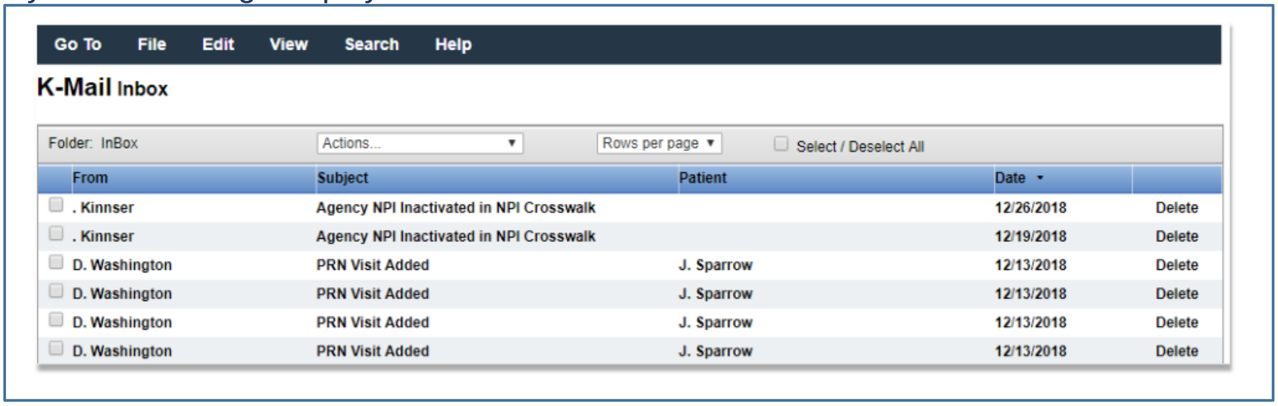
Current Signature:
New Signature:
Confirm New Signature:

Please enter your home address, personal phone number (cell or landline) and work e-mail for emergency management purposes.

K-Mail

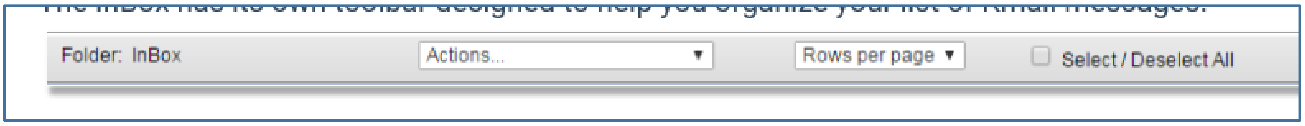
To Access Go To →**InBox**. Your InBox is your HIPAA-compliant, intra-agency e-mail system. It utilizes Kmail™, WellSky™'s proprietary messaging system. Kmail is like email, but 100% HIPAA-compliant and only accessible through WellSky™ applications. This extra level of security allows you to exchange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



From	Subject	Patient	Date	
. Kinnser	Agency NPI Inactivated in NPI Crosswalk		12/26/2018	Delete
. Kinnser	Agency NPI Inactivated in NPI Crosswalk		12/19/2018	Delete
D. Washington	PRN Visit Added	J. Sparrow	12/13/2018	Delete
D. Washington	PRN Visit Added	J. Sparrow	12/13/2018	Delete
D. Washington	PRN Visit Added	J. Sparrow	12/13/2018	Delete
D. Washington	PRN Visit Added	J. Sparrow	12/13/2018	Delete

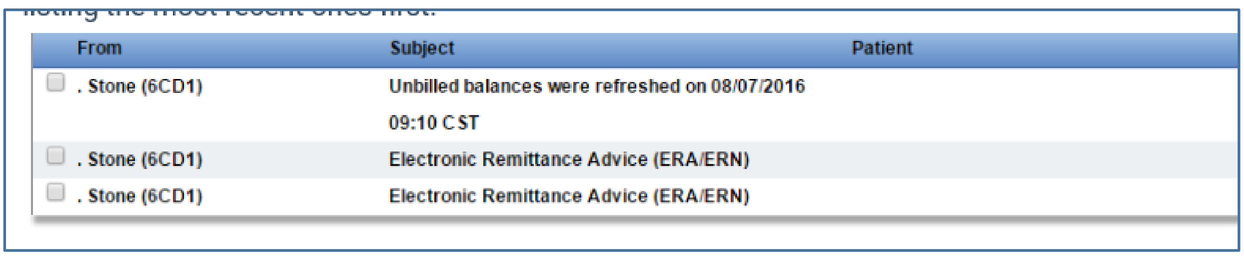
Toolbar -The InBox has its own toolbar designed to help you organize your list of Kmail messages.



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.



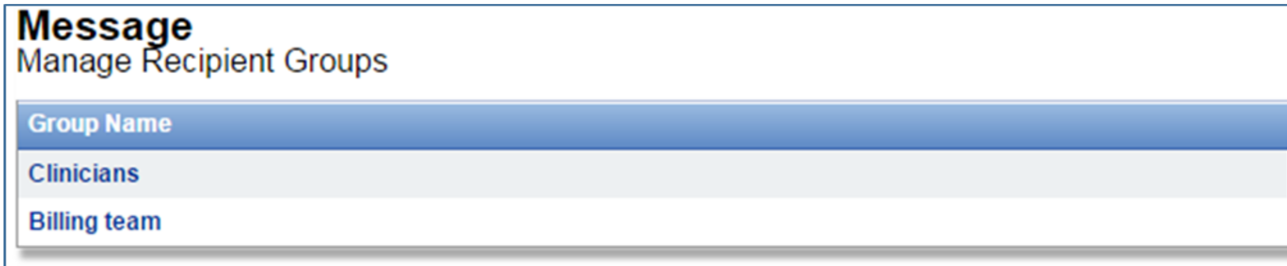
From	Subject	Patient
. Stone (6CD1)	Unbilled balances were refreshed on 08/07/2016 09:10 CST	
. Stone (6CD1)	Electronic Remittance Advice (ERA/ERN)	
. Stone (6CD1)	Electronic Remittance Advice (ERA/ERN)	

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.



This example shows two recipient groups: Clinicians and the agency Billing team.

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.

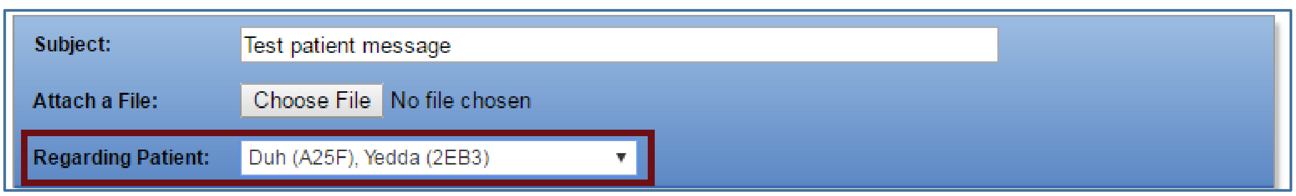
Reply to a Kmail message- From your InBox page:

1. Click a message to open the Kmail message.
2. Click the reply option you'd like to use:
   - Reply: reply only to the message sender.
   - 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).

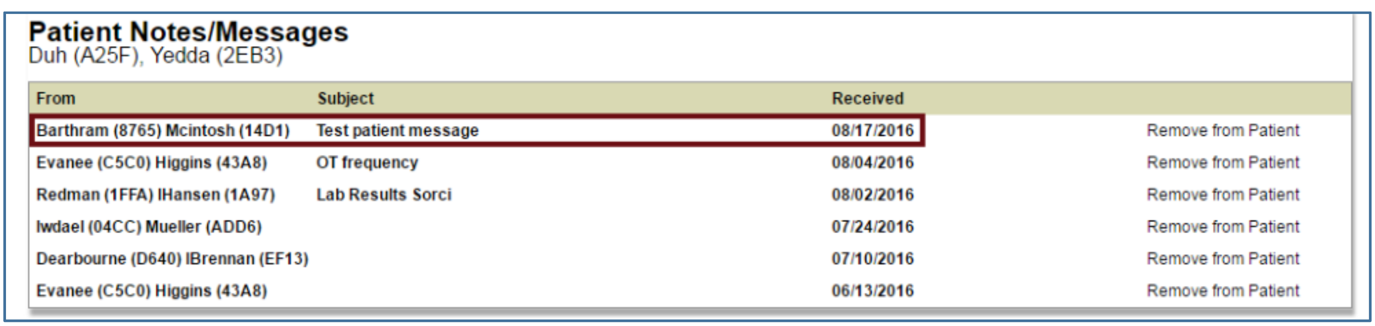
Forward a Kmail message- From the InBox page:

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.



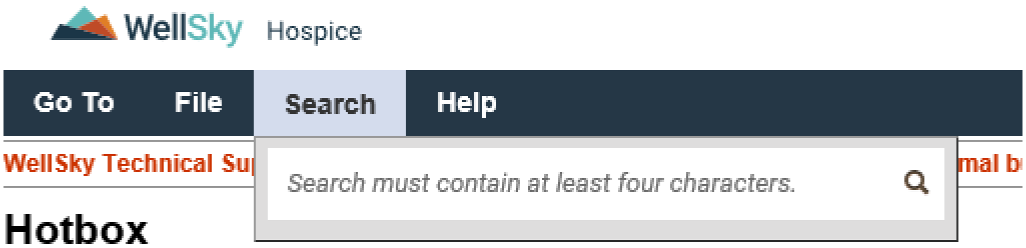
After the Kmail is sent, it is automatically added to the patient's Messages page, which is accessible from their chart.


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) lHansen (1A97)	Lab Results Sorci	08/02/2016	Remove from Patient
lwdael (04CC) Mueller (ADD6)		07/24/2016	Remove from Patient
Dearbourne (D640) lBrennan (EF13)		07/10/2016	Remove from Patient
Evanee (C5C0) Higgins (43A8)		06/13/2016	Remove from Patient

Search

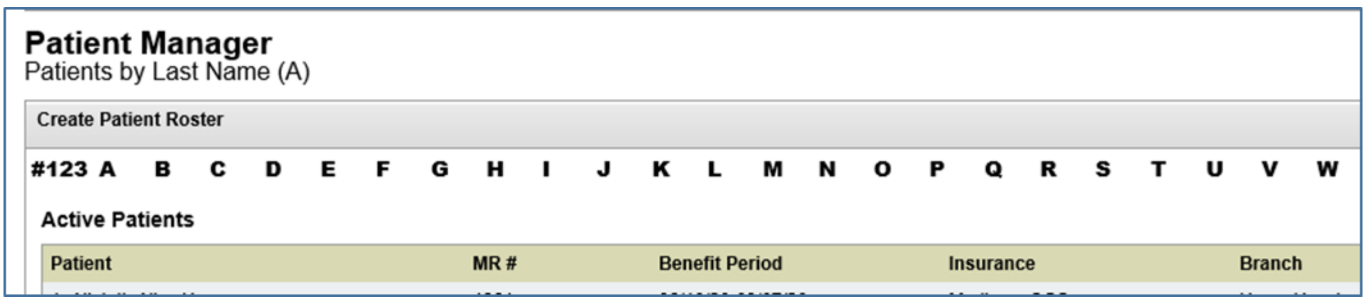
You can use the **Search** option to search for patients



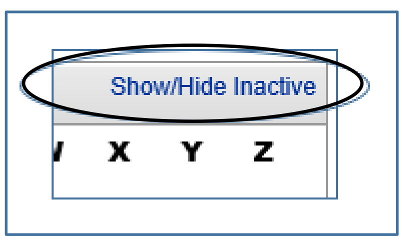
Patient Manager

Go to→ **Patient Manager.**

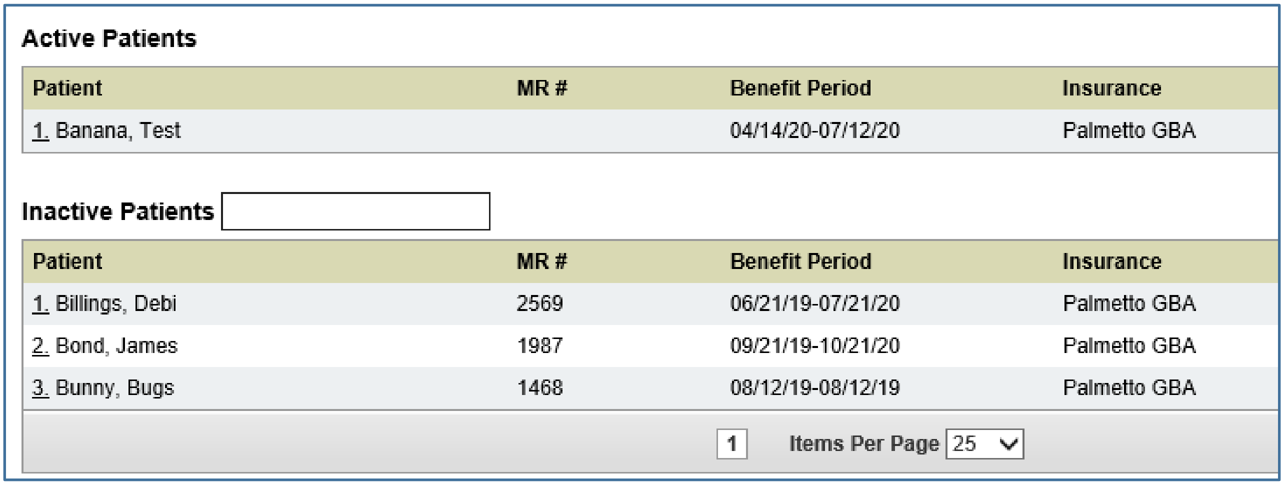
The patient manager is a list of all patients in alphabetical order. The patient manager displays the patient's name, medical record number (MRN), benefit period, insurance, and branch. The branches at Carroll Hospice are Home Hospice, Facility Based Hospice Care, IPU and Palliative Care.



The patients who initially are 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

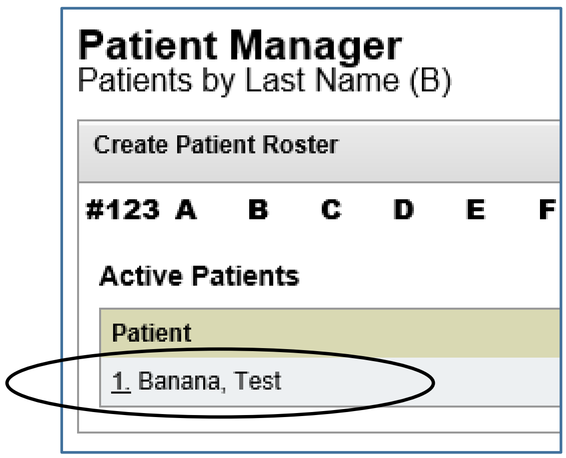
Patient	MR #	Benefit Period	Insurance
1. Banana, Test		04/14/20-07/12/20	Palmetto GBA

Inactive Patients

Patient	MR #	Benefit Period	Insurance
1. Billings, Debi	2569	06/21/19-07/21/20	Palmetto GBA
2. Bond, James	1987	09/21/19-10/21/20	Palmetto GBA
3. 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.



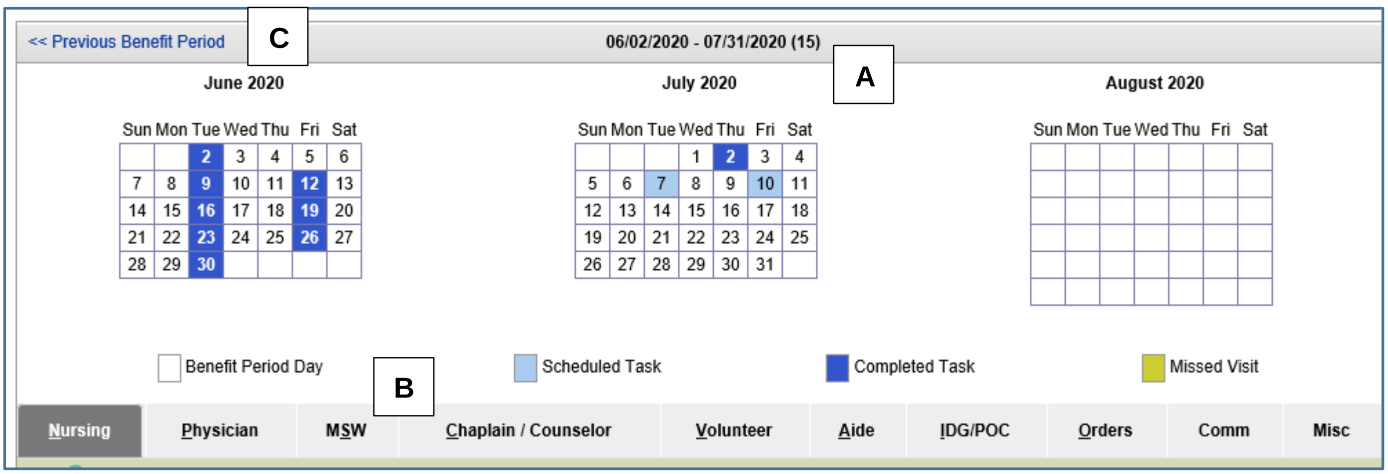
Navigating the Benefit Period Manager and/or the Bereavement Period Manager

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.

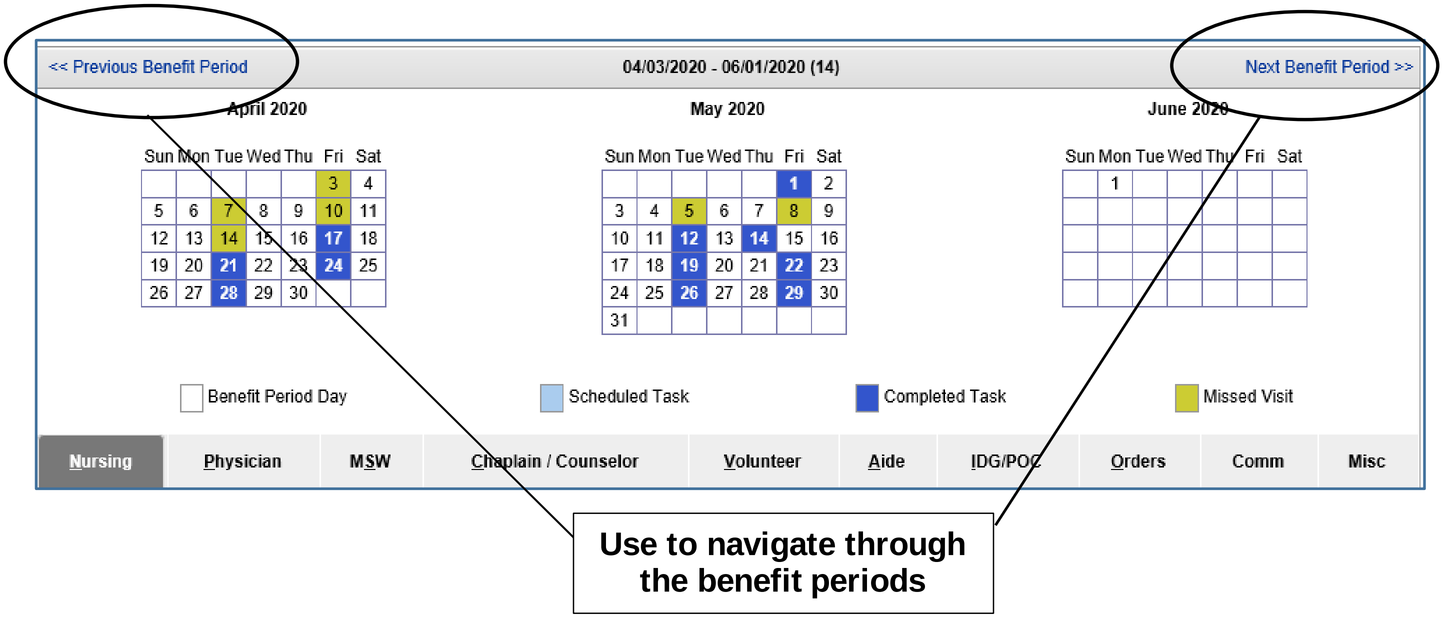
*The 90-90-60 benefit period model is for patient's who have Medicare, if a patient has another type of insurance, they may have different benefit period lengths in WellSky and require additional insurance authorization.

Benefit Period Manager

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



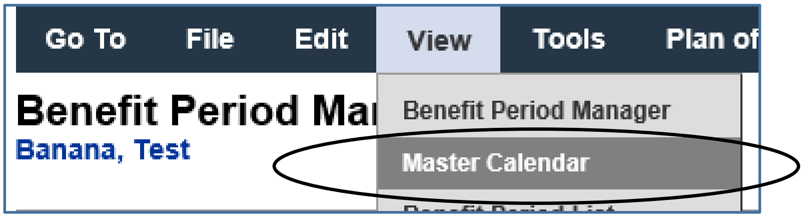
A. Current benefit period date range, in parenthesis the number of benefit periods.
B. Discipline tabs: calendar shows scheduled tasks, completed tasks, and missed visits per discipline.
C. Use to navigate to previous benefit periods.

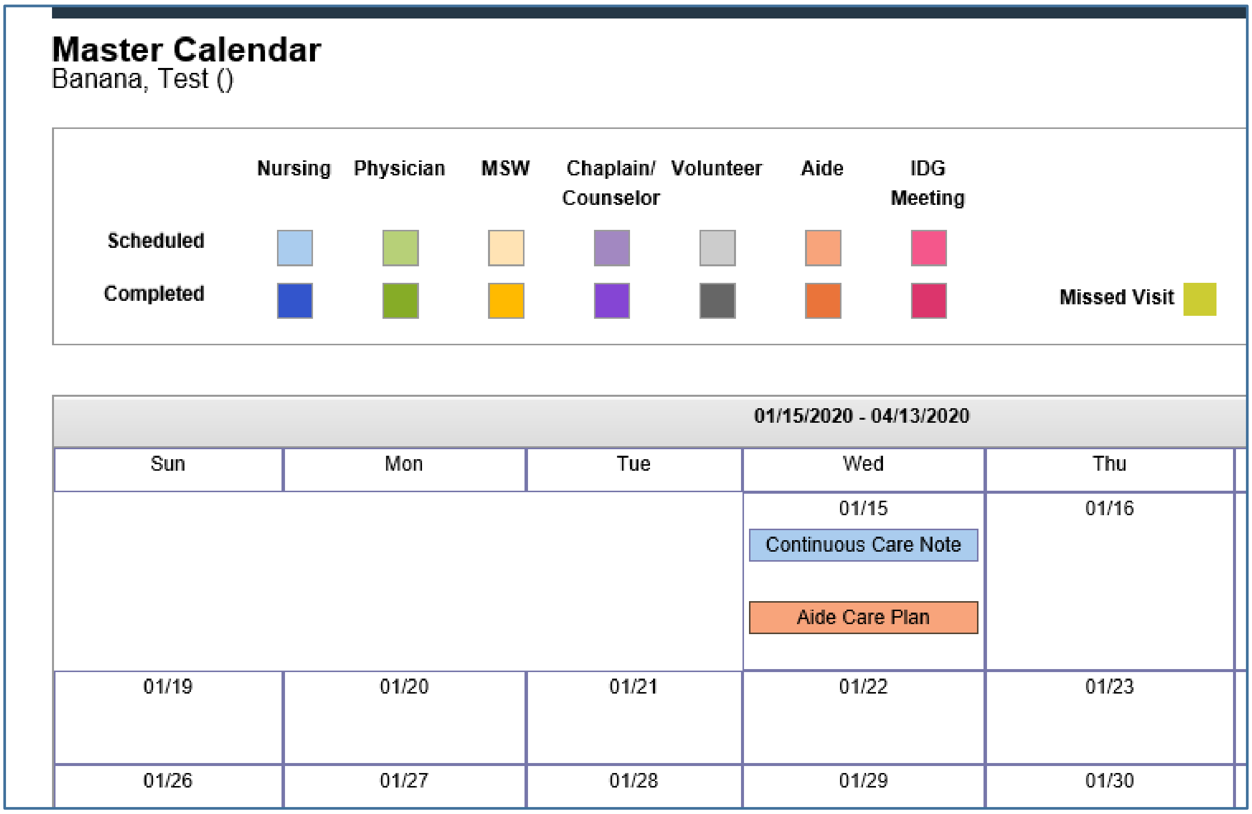


<< Previous Benefit Period
04/03/2020 - 06/01/2020 (14)
Next Benefit Period >>
April 2020
May 2020
June 2020
Sun Mon Tue Wed Thu Fri Sat
Benefit Period Day
Scheduled Task
Completed Task
Missed Visit
Nursing
Physician
MSW
Chaplain / Counselor
Volunteer
Aide
IDG/POC
Orders
Comm
Misc
Use to navigate through the benefit periods

Master Calendar

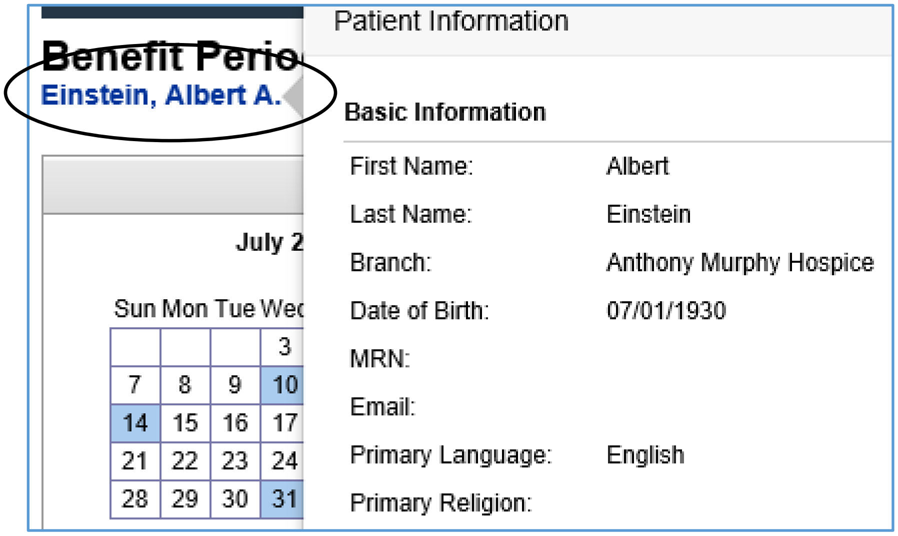
The benefit period shows a calendar of each discipline, if you want to look at a calendar which shows every discipline visit in one snapshot select View→ **Master Calendar.**





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.**



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	Claims	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	☐
2. RN - Skilled Nursing Visit	N. Chitest	07/09/2019	12/23/2019	Submitted with Signature	Print View	Details	☐

Viewing Visit Notes

Next to the task, select “Print View.”

Nursing	Physician	MSW	Chaplain / Counselor	Volunteer	Aide	IDG/POC	Orders	Clai

Task	Assigned	Target Date	Visit Date	Status	
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.

RN Initial Assessment : 06/23/2020
Banana, Test ( )
Date of Birth: 11/20/1940

Anthony Murphy Hospice
2500 Bee Caves Road , Building 2, Suite 300
Austin , TX 78746
Phone: () -
Fax: () -

Time In / Time Out

Time In: 15:00 Time Out: 16:00 Visit Date: 06/23/2020

Vital Signs

BP:	Heart Rate:	Respirations:	O2 Sat:	
During 220 / 94	During 84	During 26	During	90% Room Air via

Temperature: 97.8 Taken: Temporal
Comments:

Height and Weight

Height (feet & inches) 6 4
Mid-arm Circumference (MAC) in cm
Reported Weight Changes Gain Pounds in the past Day(s)

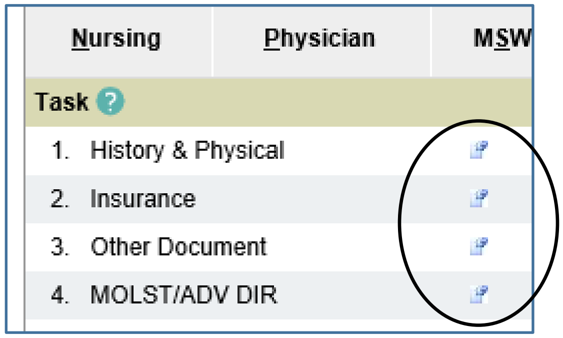
Is the patient able to be weighed? ☐ Yes ☐ No
Weight (lbs) 185
Body Mass Index (BMI)

Diagnosis Information at Admission (ICD-10)

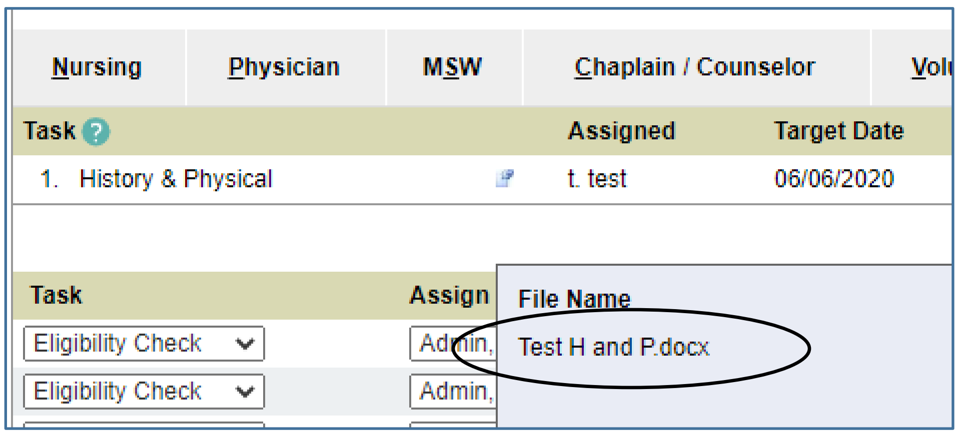
		Is this diagnosis related to terminal diagnosis?
Terminal Diagnosis:	K7031 - Alcoholic cirrhosis of liver with ascites	
Comorbidity 1:	I8501 - Esophageal varices with bleeding	✓
Comorbidity 2:	M6250 - Muscle wasting and atrophy, not elsewhere classified	✓

Viewing Uploaded Documents

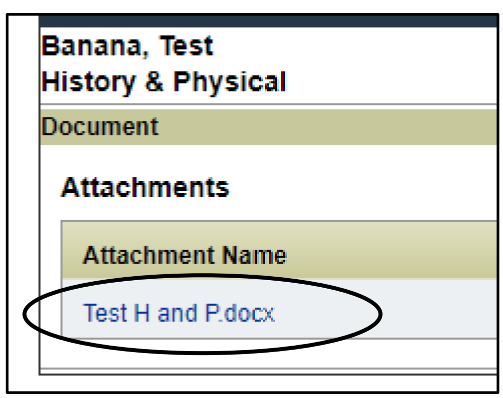
Under the Misc. Tab documents such as consents, history and physical, MOLST/POLST, and advanced directives. When a document(s) is attached to a task an icon will appear next to the task.



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.

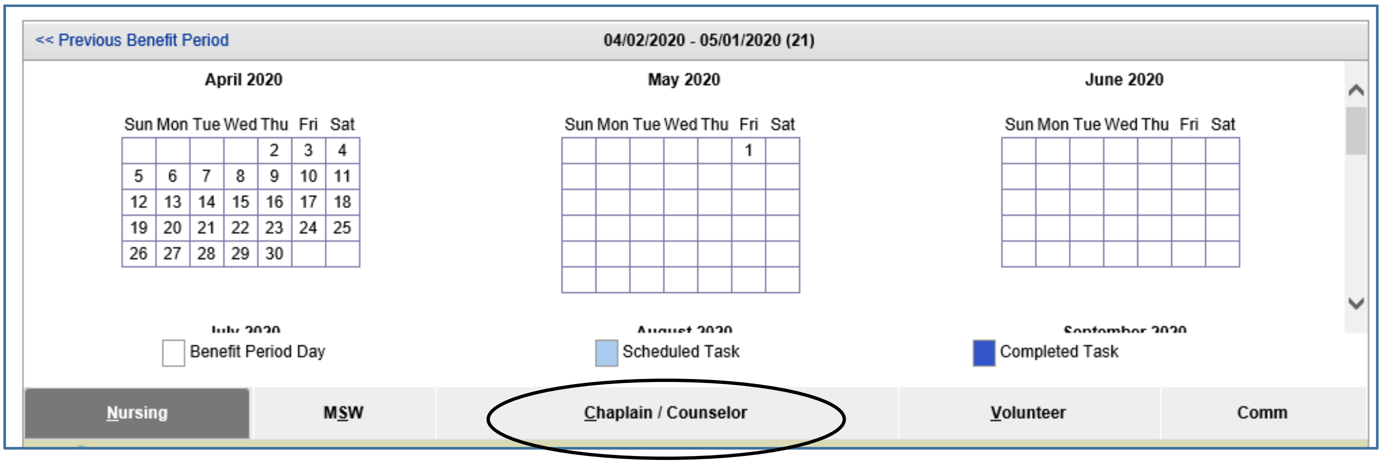


You can also select **Print View** which will open another window which has a link to the attached document.



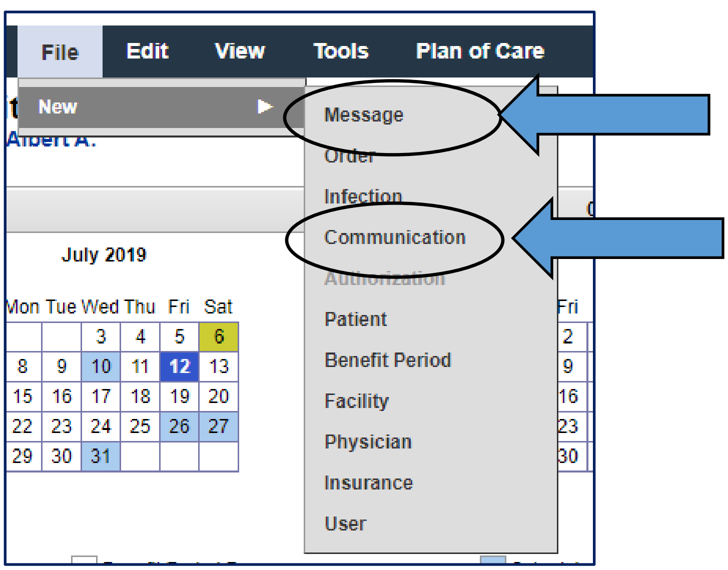
Bereavement Period Manager

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

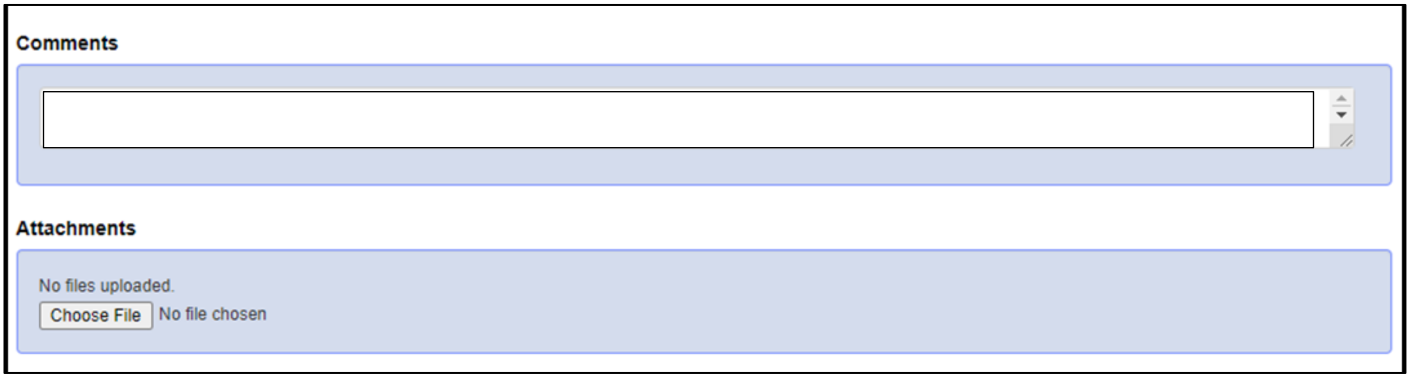


Use to send K-Mail Pertaining to a Specific Patient <u>REMINDER:</u> The message will attach to the medical record.

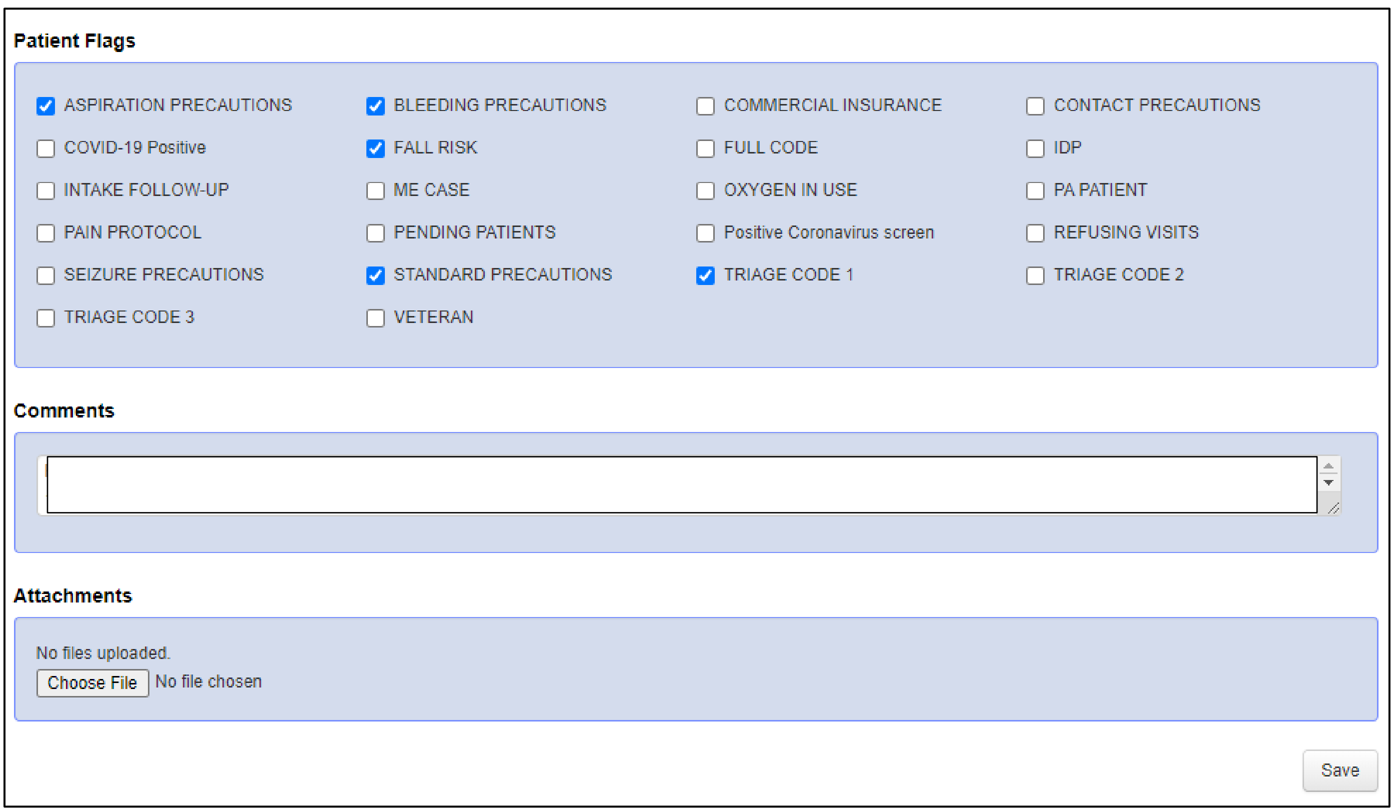
Document pt/family/CG communication, which appears under the comm. tab.

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.



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.



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.

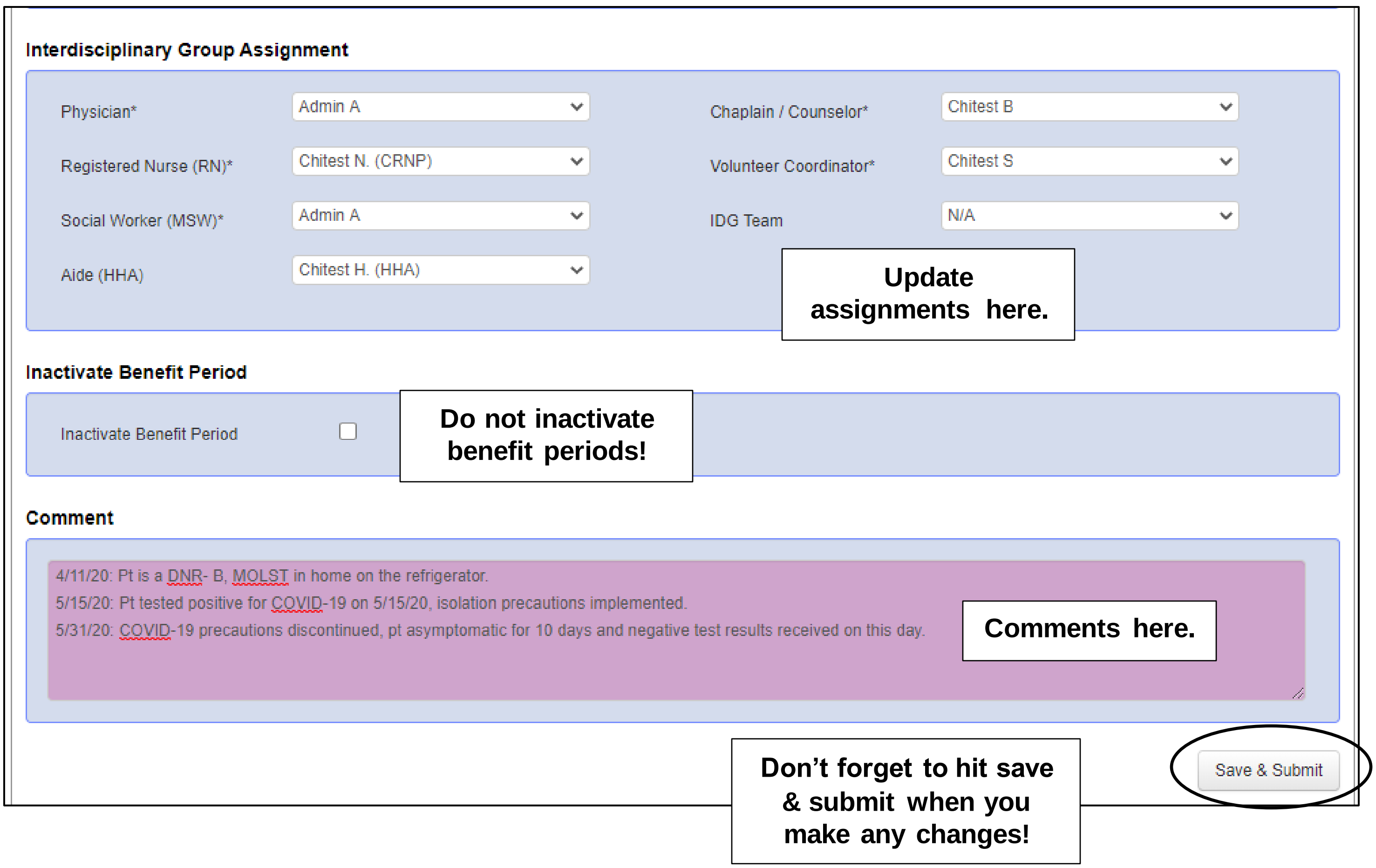
Facility- Last Name Letter A-K= **Team A**

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

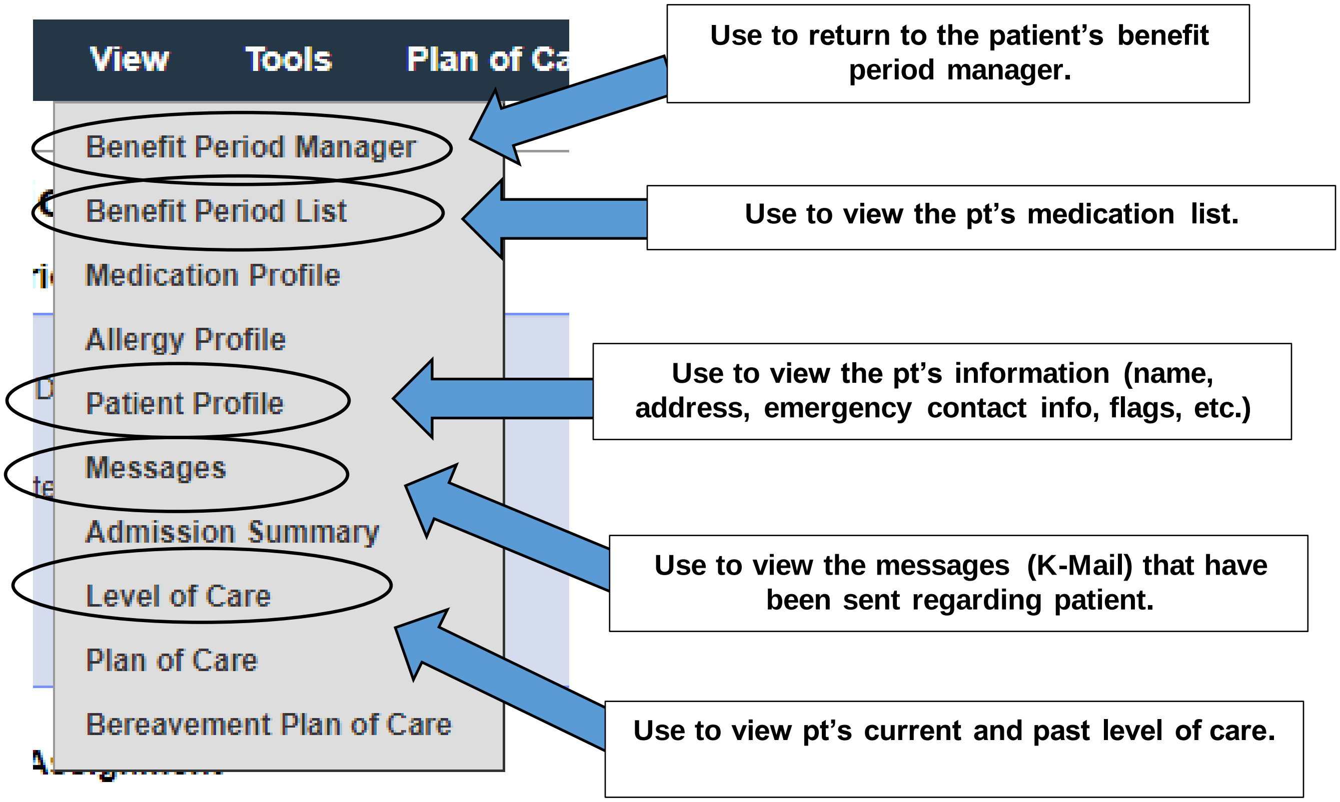
Home- Last Name Letter A-K= **Team C**

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

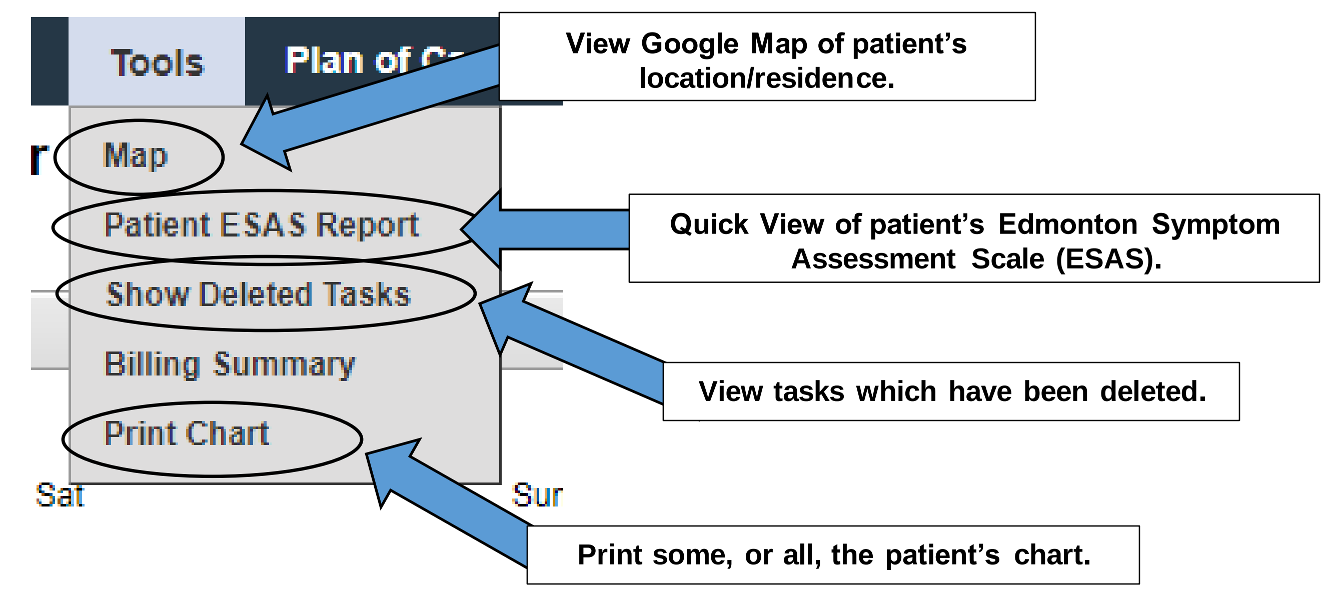
Dove= **Team E**



View


View
Tools
Benefit Period Manager
Benefit Period List
Medication Profile
Allergy Profile
Patient Profile
Messages
Admission Summary
Level of Care
Plan of Care
Bereavement Plan of Care
Use to return to the patient's benefit period manager.
Use to view the pt's medication list.
Use to view the pt's information (name, address, emergency contact info, flags, etc.)
Use to view the messages (K-Mail) that have been sent regarding patient.
Use to view pt's current and past level of care.

Tools


Tools
Map
Patient ESAS Report
Show Deleted Tasks
Billing Summary
Print Chart
Sat
View Google Map of patient's location/residence.
Quick View of patient's Edmonton Symptom Assessment Scale (ESAS).
View tasks which have been deleted.
Print some, or all, the patient's chart.

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

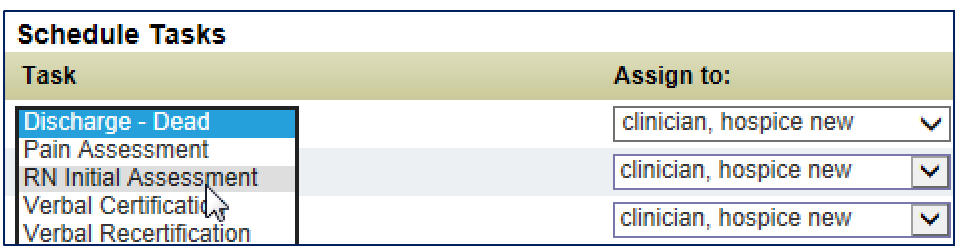
Scheduling Tasks

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.

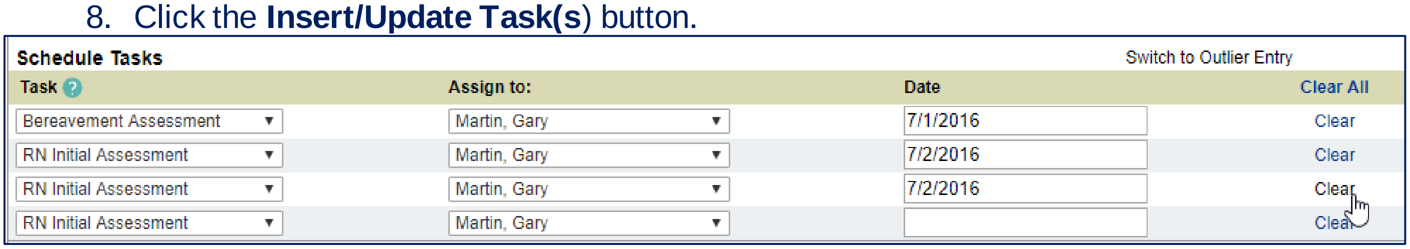
From the patient's benefit period manager:

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).

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



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.



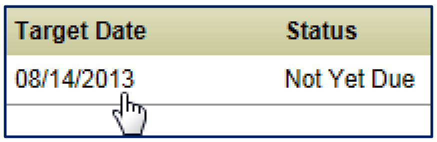
Managing Tasks

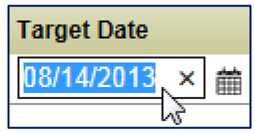
Task information, including target date, assigned clinician, and current location, can be edited from Benefit Period Manager.

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.



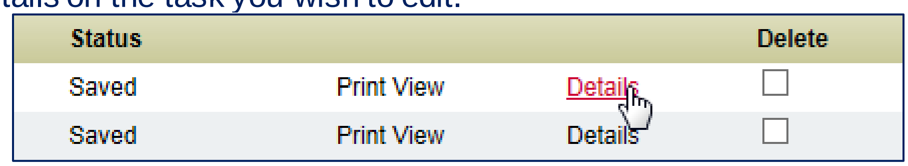


3. You can also click the calendar icon to launch a date picker.
4. Click the Insert/Update Task(s) button.
5. **Results:** The task is updated with the new Target Date

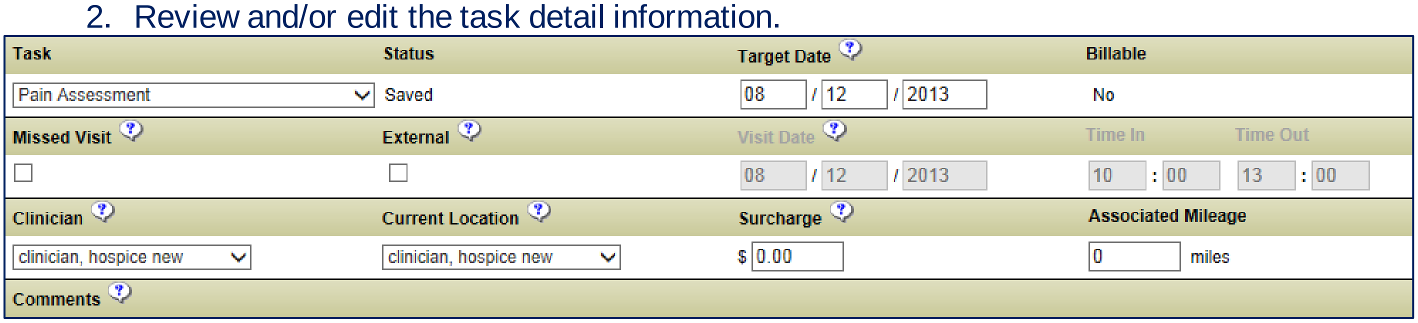
Edit episode task details information

From the patient's Benefit Period Manager page:

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



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



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	☑
Not Yet Due		Details	☐

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	Details	

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

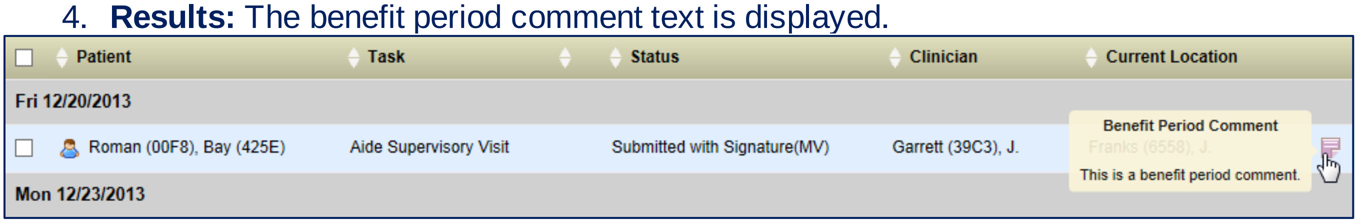
From the patient's Benefit Period Manager page:

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:

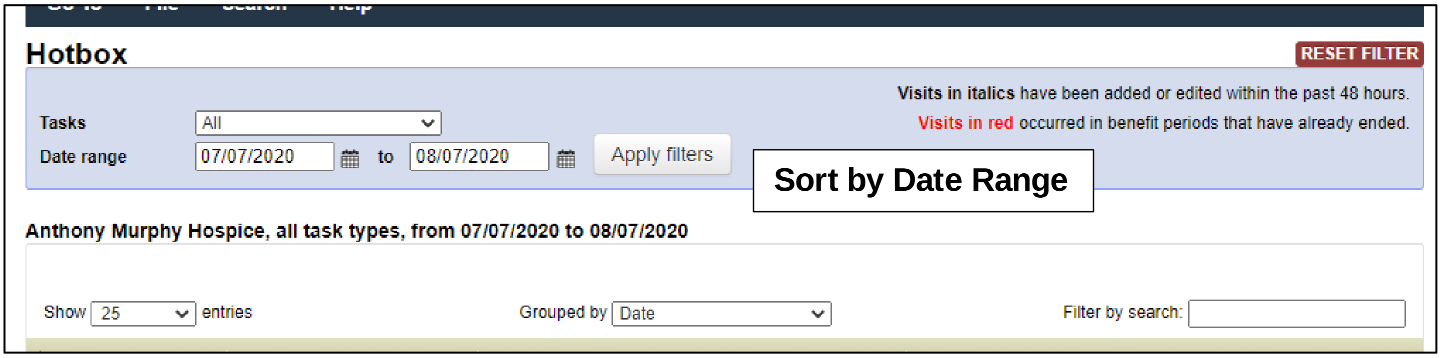
1. Click Go To on the toolbar.
2. Select HotBox or QA Manager.
3.  Place your mouse cursor, without clicking, on the purple sticky icon for the desired patient task.
4. **Results:** The benefit period comment text is displayed.



	Patient	Task	Status	Clinician	Current Location
Fri 12/20/2013					
	Roman (00F8), Bay (425E)	Aide Supervisory Visit	Submitted with Signature(MV)	Garrett (39C3), J.	Franks (6558), J.
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.



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

Notes

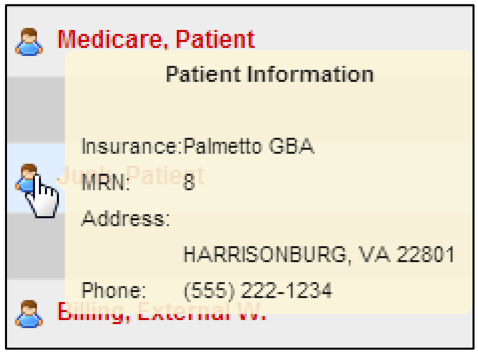
- Remember that patients whose names appear in red are patients who have visits in the hotbox that are in episodes that have already ended.
- Patients whose visits were just recently added or modified within the last two days appear with their names bolded.

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.

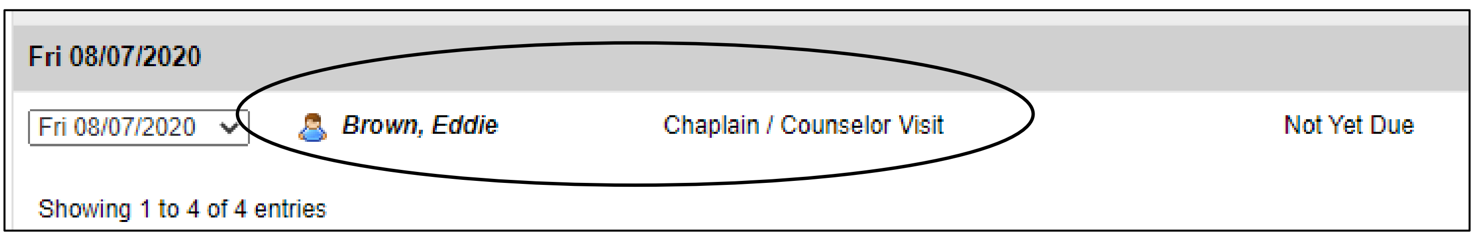
Quick Patient Profile

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.

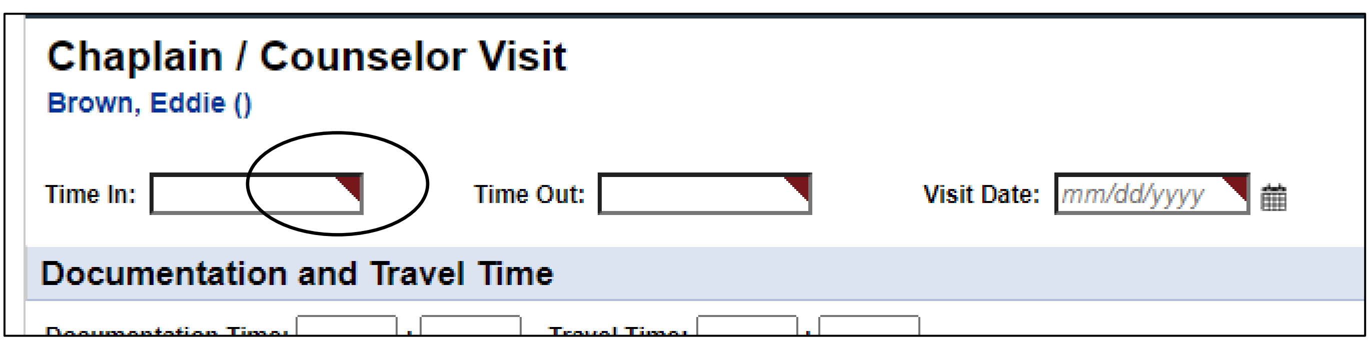


Documenting on a Task

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



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



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

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