Aging & Disability

Information & Referral User Guide

Version 8.1

Release Date: November 2025

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Printed in the United States – 2025

Contact WellSky Support

Please be sure to identify your full name and the name of your organization in voicemails or emails.

Client Resource Center 24/7: https://wellsky.my.site.com/AgingandDisability. New to the Client Resource Center? Click the Request Account link to set up your account.

Client Experience Support: 855-WELLSKY

WellSky Corporation
11300 Switzer Road
Overland Park, KS 66210
http://www.wellsky.com

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A&D I&R User Guide

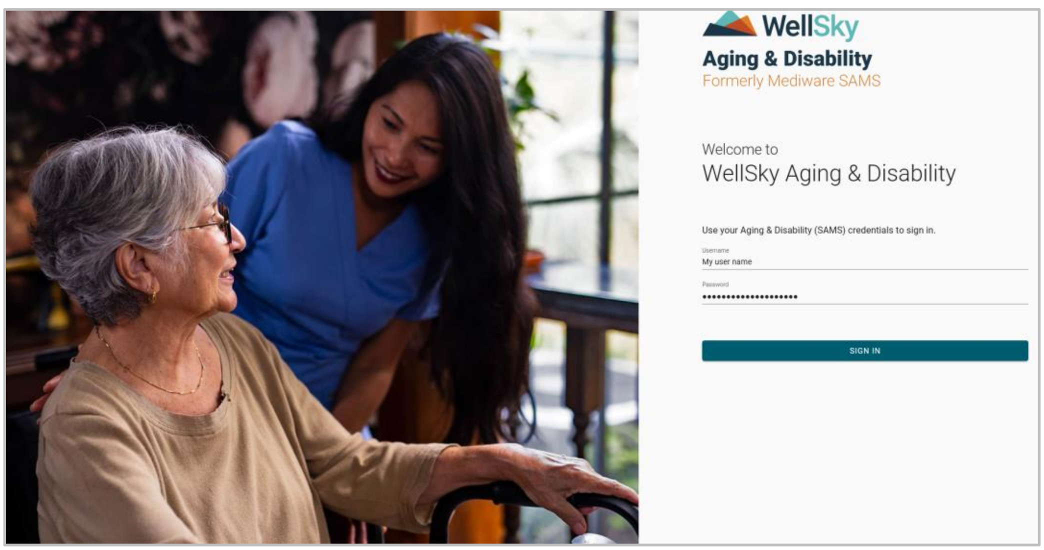
The Aging & Disability Information and Referral (I&R) module is a “one-stop-shop” for finding services for seniors, veterans, and adults with physical and intellectual disabilities. Call records include consumer data, a method to assess needs, and an easy way to provide information and make referrals.

NOTE - This guide assumes you know the basics of the Aging & Disability solution. For more information, refer to the *Aging & Disability User Guide*, on the WellSky Customer Portal and the Client Resource Center.

Log into Aging & Disability

Your Aging & Disability administrator will provide you with the URL for the Aging & Disability I&R website.

1. While logged into the WellSky Customer Portal, click the **Aging & Disability** solution link.
2. Type your **User Name** and **Password.**
3. Click **SIGN IN**. Check with your Aging & Disability administrator for password guidelines.



Solution overview

People may contact your organization for information, referrals, and/or help. When the contact is received, the call session starts in Aging & Disability I&R. The call session contains information about the caller, the topics discussed, and the call duration, among other information. From the call session, you can create an assessment, add notes, order services, and more.

NOTE - The call session can be an incoming phone call, but it can also be a fax, email, walk-in, or some other form of initial contact with your organization.

The call session includes the person who is calling (known as the caller) and the person for whom they are calling (known as the consumer). The caller can be a family member, friend, neighbor, or another person. If a caller contacts the organization about services for themselves, they are referred to as both a caller and a consumer.

I&R caller/consumer records

When the call session begins, Aging & Disability is searched to see if a record exists for the caller and/or consumer. If the caller has a record, that record is updated with the new call information. If the caller does not have a record, a new one is created. This can be done from the I&R main screen. If the consumer is known, a consumer record is automatically created when the call record is saved, unless the consumer already has a record. In that case, their existing consumer record is updated. If the consumer is anonymous, a consumer record is not created.

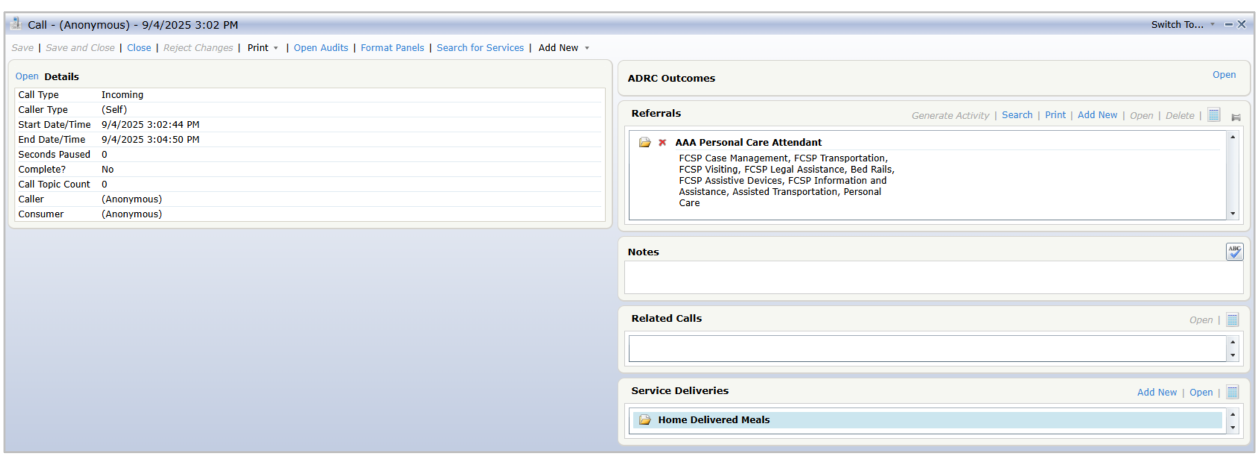
The table below describes the varying circumstances under which caller records and consumer records are created. It assumes that neither the caller nor the consumer has existing records.

IF	AND	THEN	AND
Caller is self		Call record created for self	Consumer record automatically created for self
Caller is named	**Consumer** is named	Call record created for named caller	Consumer record automatically created for named consumer

IF	AND	THEN	AND
Caller is anonymous	**Consumer** is named	Call record created for anonymous caller	Consumer record automatically created for named consumer
Caller is named	**Consumer** is anonymous	Call record created for named caller	No consumer record created for anonymous consumer
Caller is anonymous	**Consumer** is anonymous	Call record created for anonymous caller	No consumer record created for anonymous consumer

I&R call record

Each I&R call record includes a toolbar, a place to record activities related to the call, ADRC outcomes, a place for freeform notes, and a list of related calls. For a list of fields and descriptions in the I&R record, see the Appendix.

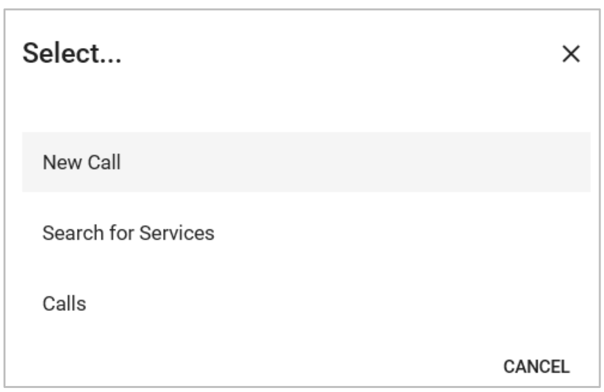


Add a call

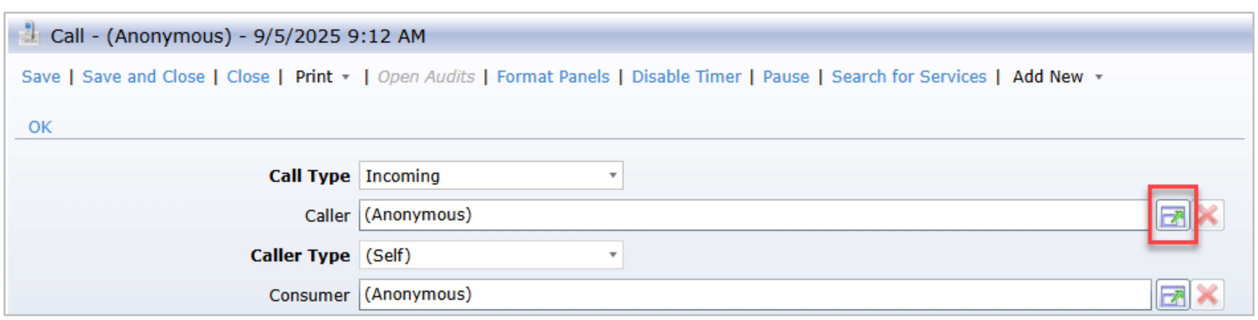
It is important to search for consumer and caller records before adding new records. This maintains the history for the person in one place. When adding a new call record, if there are no matching records, a new record is added. This section details how to perform a basic search. For information on additional search options, see Advanced Search.

1. Log into Aging & Disability.
2. Click **Calls** in the **Navigation** bar.

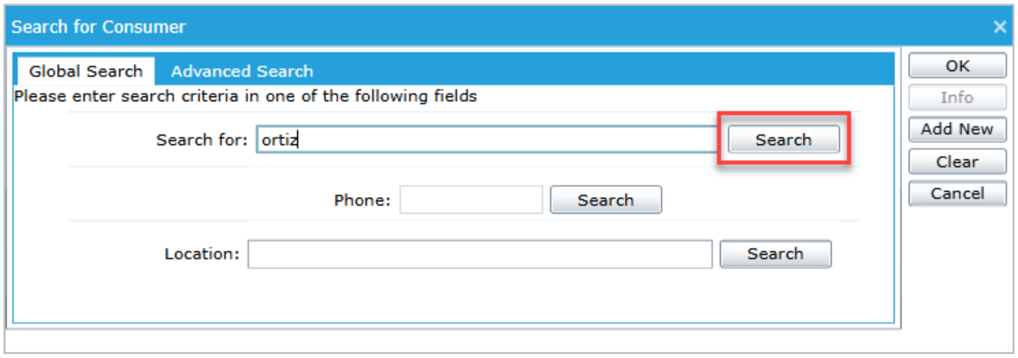
3. Click **New Call**.



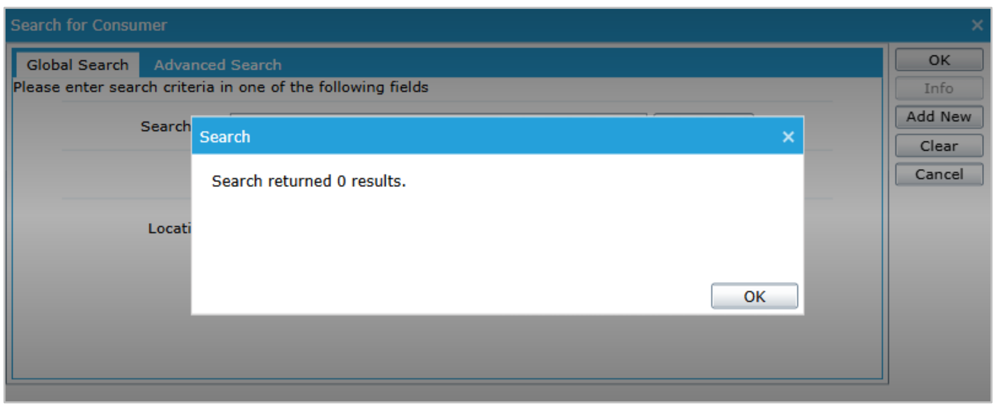
4. In the **Caller** or **Consumer** field, click the **Open Dialog** button.



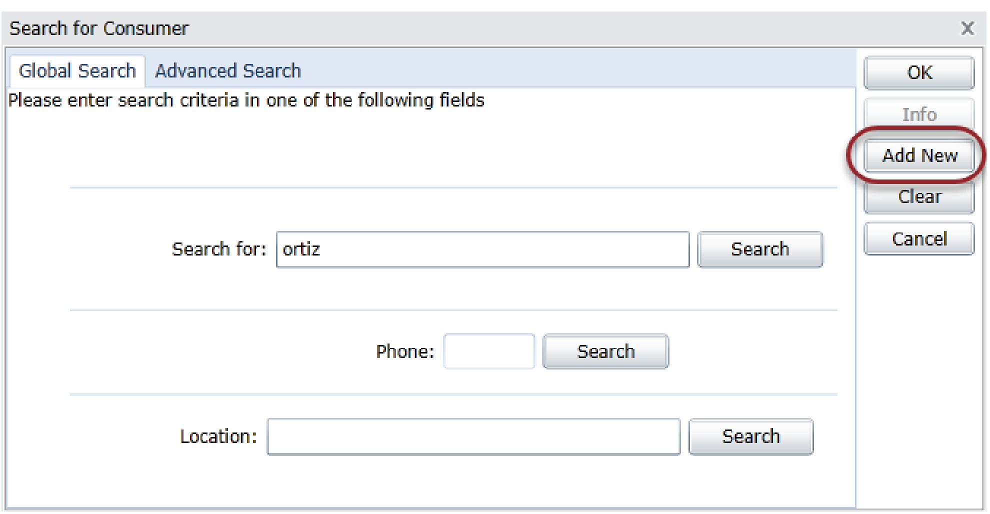
5. From the **Global Search** tab, type the name of the caller in the **Search for** field, then click **Search**.



a. When no matching record is found, a message is displayed. Click **OK**.

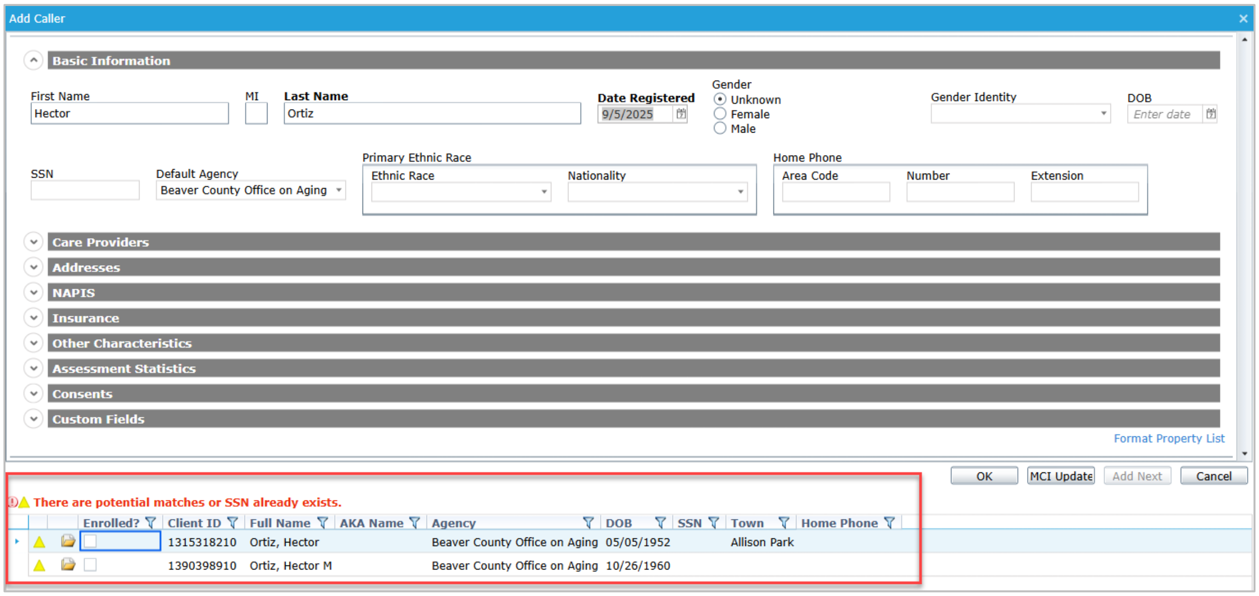


6. In the search results screen, click **Add New**.

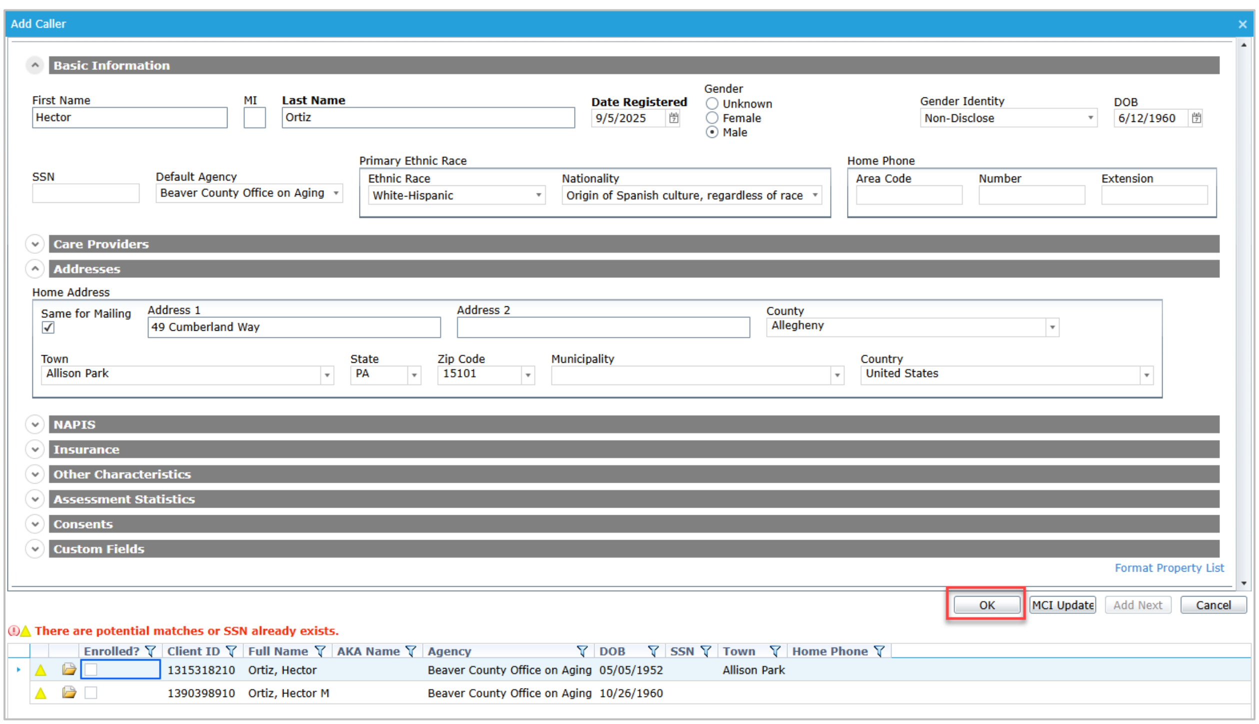


7. Complete the bold fields and other fields as information is known. Check with your administrator for your organization's data entry requirements.

a. As you type, possible matching records are displayed. If one of the records is a match, click it and edit the record, rather than creating a new one.

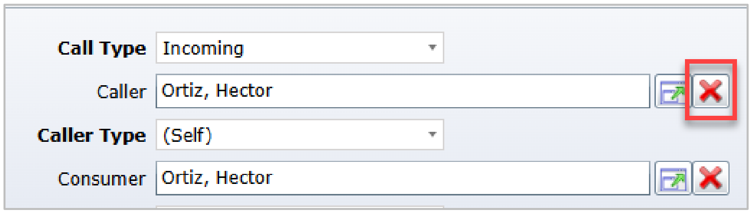


8. When finished, click **OK.**



9. The Caller/Consumer data is added to the call record.

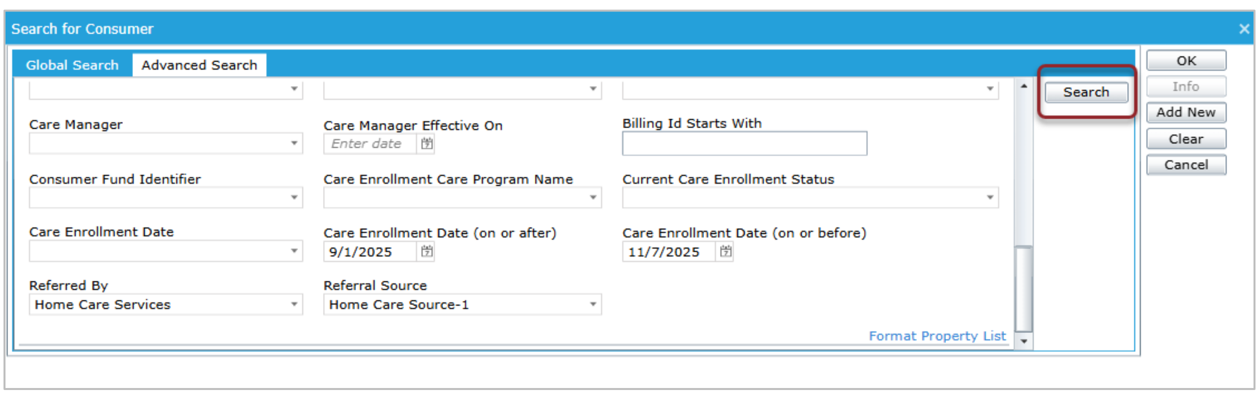
NOTE - To change the caller, click **Clear Contents**, to the right of the Caller or Consumer field. The Caller or Consumer types revert to Anonymous.



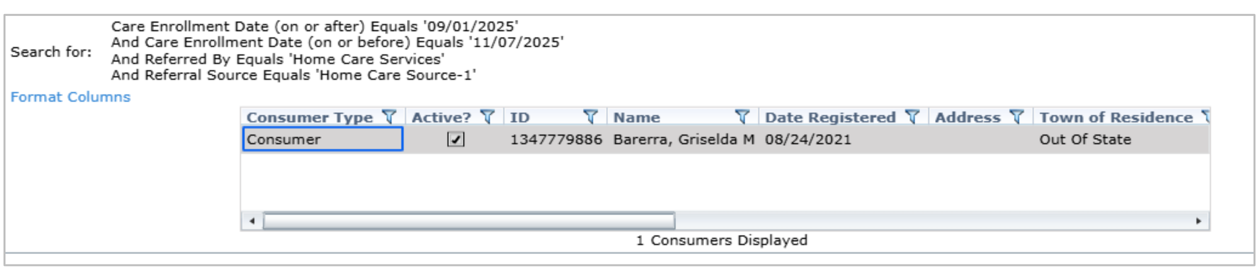
Advanced Search

If a basic search does not locate a matching record, users can use the Advanced Search feature. This allows searches on more than one field, such as the consumer's Medicaid ID number and a partial addresses, and on the organization who referred the consumer, among many other fields.

1. Follow steps 1 – 4 in the Add a call section.
2. Click the **Advanced Search** tab.
3. Select search criteria, then click **Search**.



4. Matching records are displayed at the bottom of the screen.



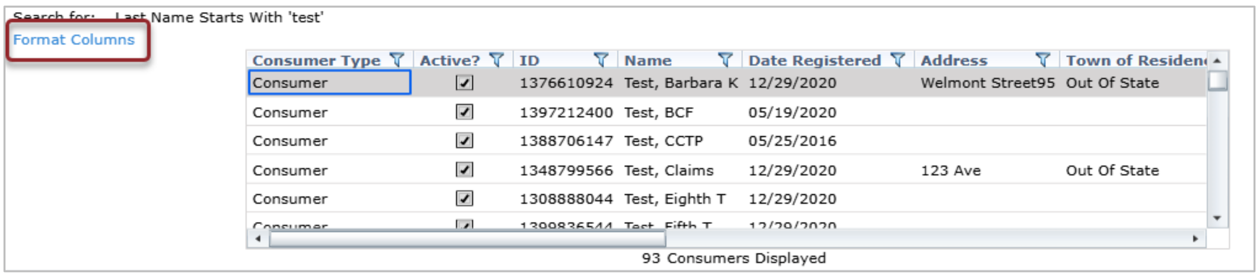
5. Select the record and click **OK** at the top of the screen.

Search result columns

For both Basic and Advanced search results, users can customize the columns that are displayed.

1. Perform a basic or advanced search for a consumer record.

2. Within the Search Results grid, click **Format Columns**.

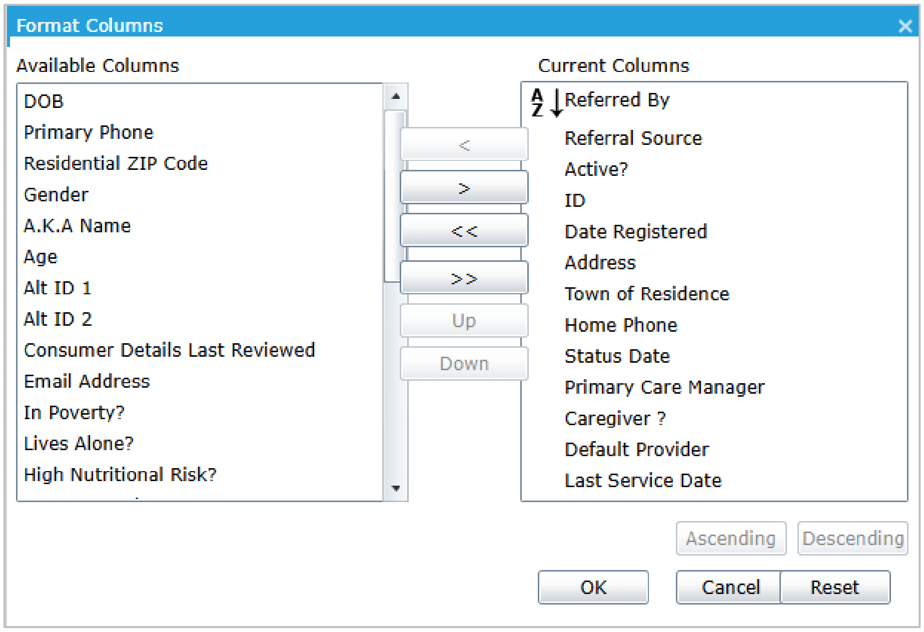


3. Options are displayed in both the Available Columns and the Current Columns boxes. To view a column on the Search Results grid, select it from the Available Columns box and use the arrows to move it to the Current Columns box. Users can also remove columns from view by selecting a column from the Current Columns box and using the arrows to move it to the Available Columns box.

    a. To rearrange the items in the Current Columns list, select a column and click the **Up** or **Down** buttons.

    b. To sort one of the columns in the Current Columns list, click **Ascending** or **Descending**. In the screenshot below, the Referred By column is sorted in Ascending order.

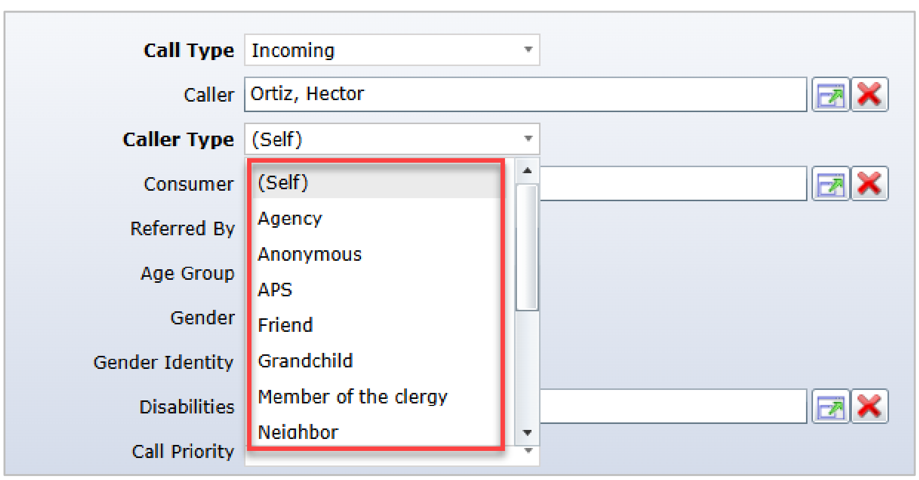
4. When finished, click **OK**. The column order is retained from session to session.



Add call details

Detailed information can be added for the call; follow your organization's policies when adding call details. For a complete description of each field, see the Appendix.

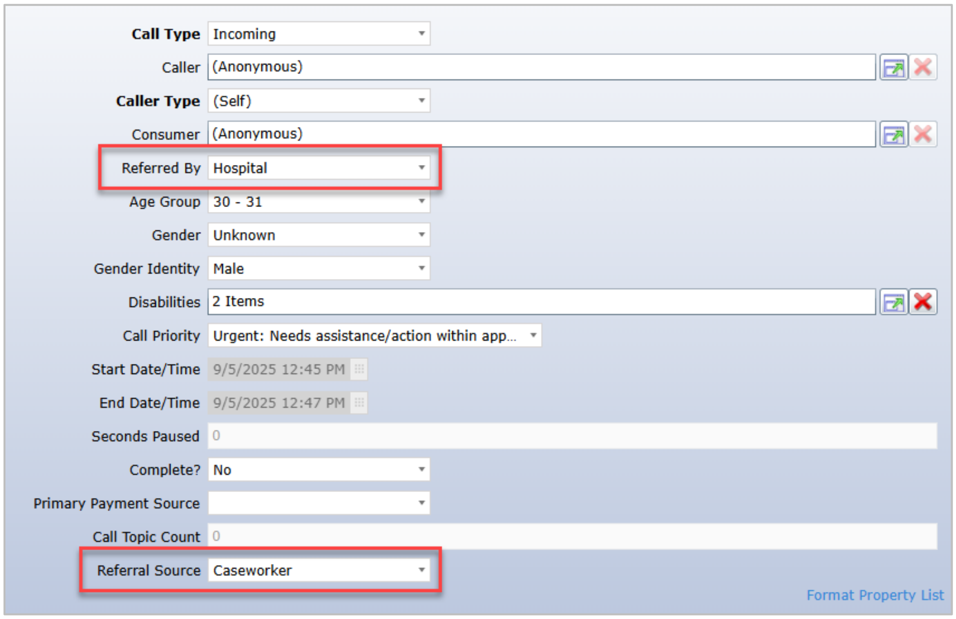
1. With a call open, in the **Caller Type** field, click the arrow to display options and then select the appropriate caller type.



2. In the **Consumer** field, if the consumer is someone other than the caller, click **Open**, search for a possible matching record, and then select it. If no matching record is found, click **Add Consumer**.

3. In the **Referred By** field, select the referral source, if needed.

TIP – If the Referred By field is configured to display a Referral Source, select the appropriate source. If the Referred By field is not configured to display a Referral Source, the Referral Source field is not displayed.



4. Complete the remaining fields, as needed. Check with your Aging & Disability administrator for your organization's data entry requirements.

5. In the **Complete** field, select **Yes** if the call has been completed.

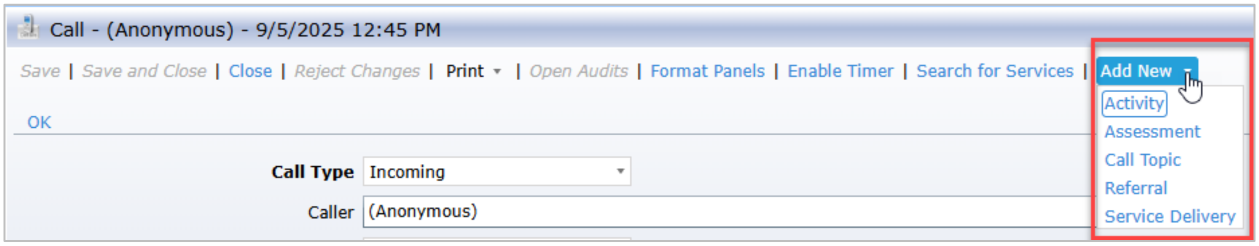
6. Click **Save and Close**.

Add panes

To add data to a pane that isn't displayed on the consumer or call record:

1. Open the consumer or call record.

2. In the **Consumer Details** toolbar, click the arrow in the **Add New** menu to see more options, and then select the pane you want to add.

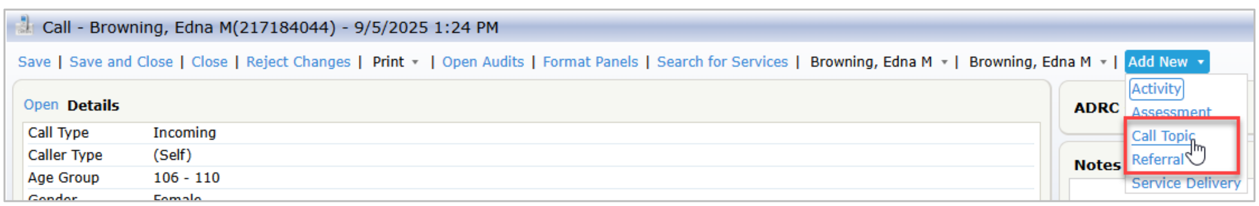


Add topics

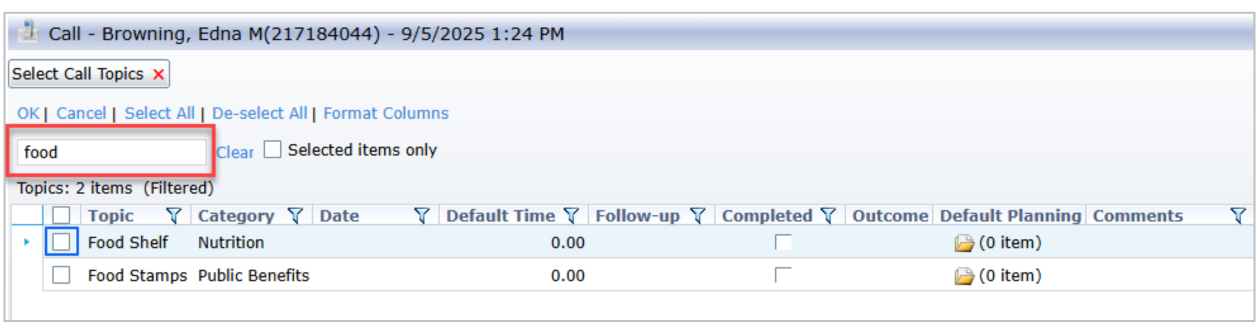
Topics are items that are discussed in the call. One or many topics can be discussed and it's important to identify each item and the time spent on it.

If a named consumer is identified in the call record, the call record can be accessed from either the consumer record or the call record.

1. If you're on a call or in a consumer record and the Topics pane is not displayed, click **Add New** and then select **Call Topic.**



2. On the **Topics** screen, select the topics discussed during the call. If the topic list is long, you can search for a topic by typing keywords into the **Search by Topic Name** field. As you type, matching topics are displayed.



3. Select the topic(s).

4. At the bottom of the screen, the Default Date defaults to today. If you need to change it, either type the date into the field or click the **Calendar** to select a date, then click the **Apply** link next to the field.

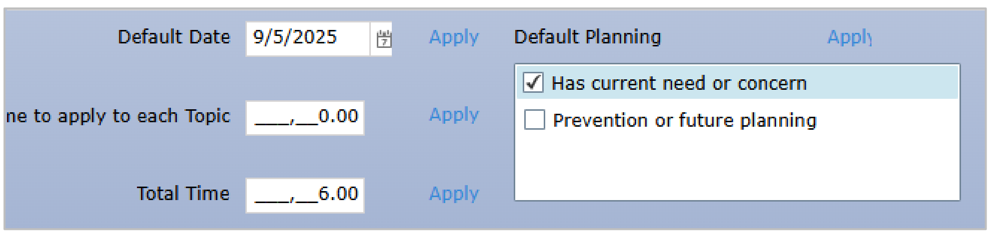
5. You can add time in two ways:

   a. To add the same amount of time for each topic, add the time in the **Time to apply to each Topic** field. Click the **Apply** link next to the field.

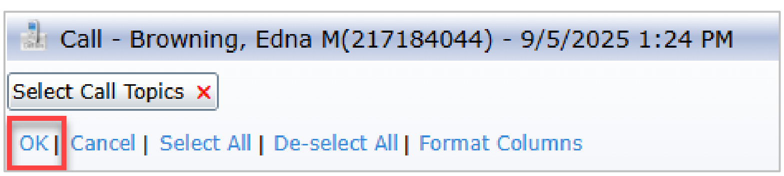
   b. To add time for the call duration, enter the time in the **Total Time** field. Click the **Apply** link next to the field.

TIP - Time is entered in minutes. For example, if the call lasted an hour, type 60. If the call lasted 20 minutes, type 20, and so on. The zeros to the right of the decimal are automatically added.

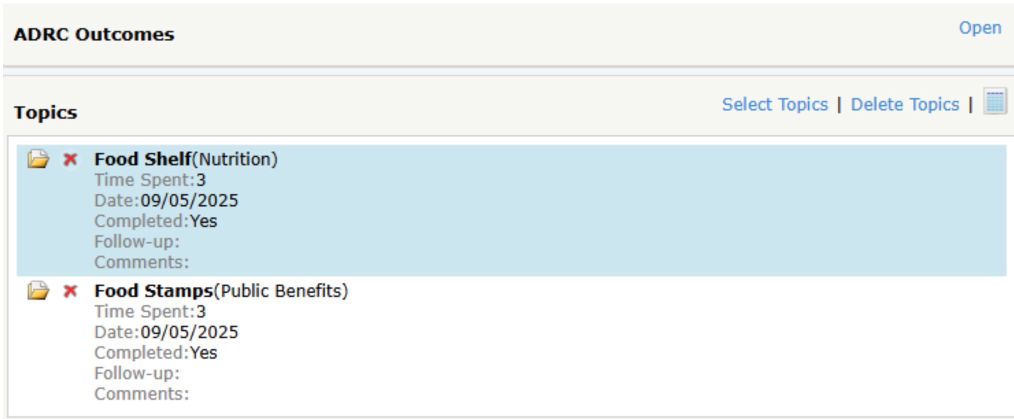
6. In the Default Planning field, select an option, if needed, then click **Apply** above the box.



7. When you're finished, click **OK.**



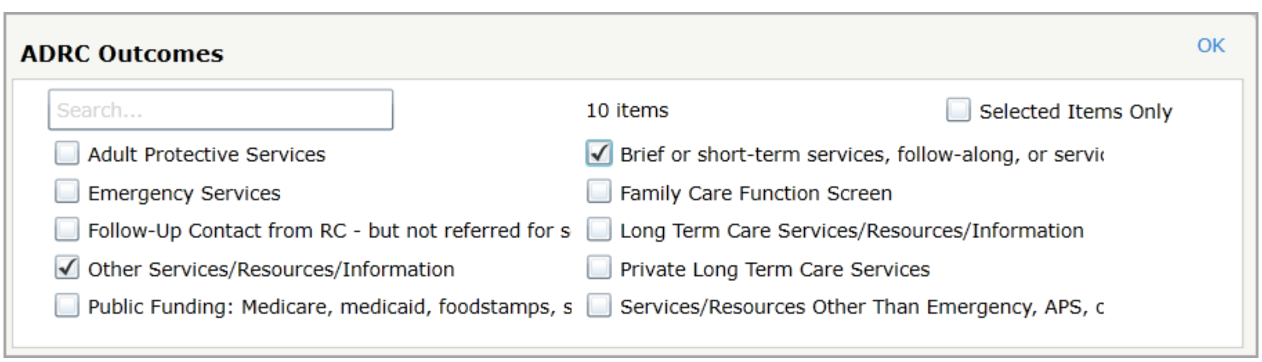
8. The **Topics** pane is updated.



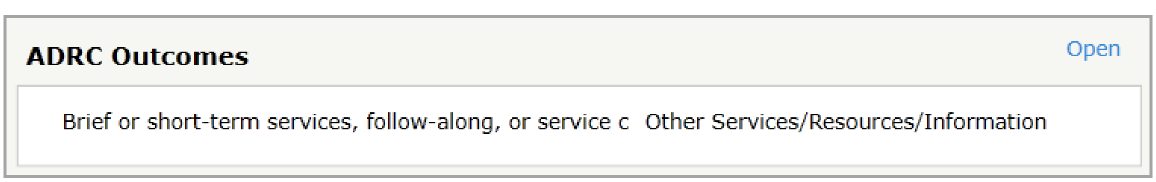
Add ADRC Outcomes

The Aging & Disability Resource Center (ADRC) Outcomes identify the result of the call. This information is primarily used in reporting and analysis of your organization's I&R calls.

1. Click **Calls** in the **Navigation** bar.
2. Select **Calls** and open the call record.
3. Click **Open** in the **ADRC Outcomes** pane.
4. Type a service in the **Search** field or select the outcome(s) of the call.
5. When you're finished, click **OK**.



6. The **ADRC Outcomes** pane is updated.



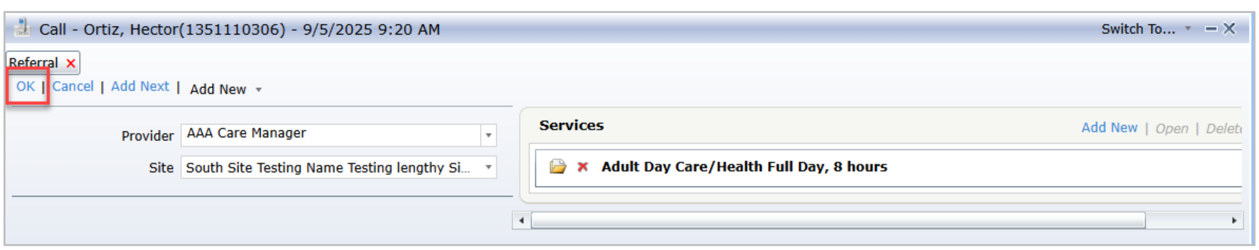
Add services and referrals

During a call, callers may request information about providers. These are tracked as referrals. You can quickly add a referral if the provider is known, or you can search for a provider(s) based on the caller's need. In addition, the referral source can be identified.

Add a referral

1. From the **Navigation** bar, click **Calls.**
2. Select **Calls** and then open the call you want to work with.
3. If the **Referrals** pane is not displayed, click the arrow in the **Add New** field on the **Call** toolbar and then select **Referral.**
4. If the **Referrals** pane is displayed, click **Add New** in the pane toolbar.

5. Select the **Provider** and, optionally, the **Site.**
6. To add services to the referral, click **Add New** in the **Services** pane.
7. Click **OK** to save the referral.

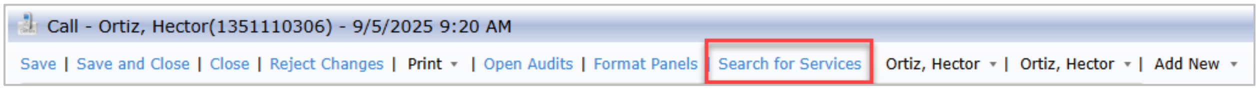


Search for services

You can search for services when the provider is not known.

1. From the **Navigation** bar, click **Calls.**
2. Select **Calls** and then open the call you want to work with.

3. In the **Call** toolbar, click **Search for Services.**



4. Type search words such as adult day or transportation.

   a. To search for providers within only one agency, select **Limit search to one agency**, then select the provider.

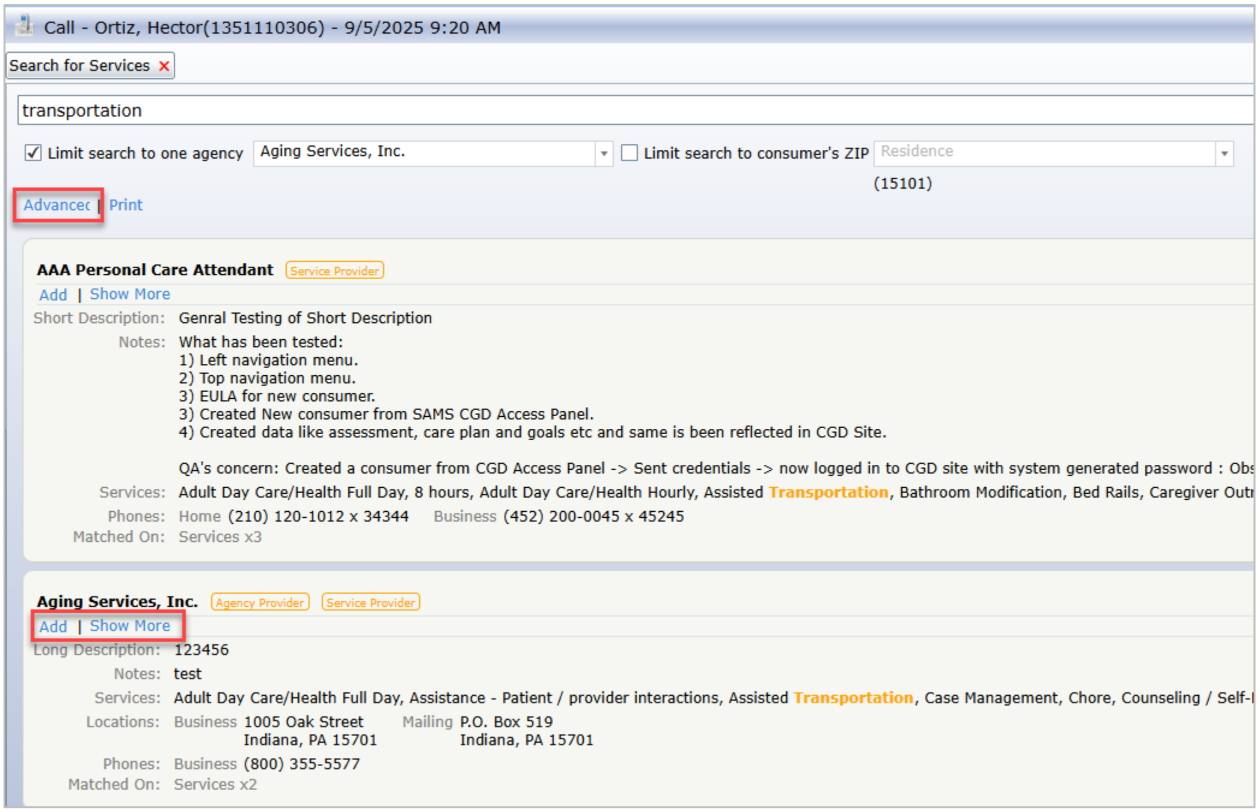
   b. To search for providers within the consumer's ZIP Code, select **Limit search to consumer's ZIP Code**. Then select the ZIP Code.

TIP – To perform a search on one or more additional parameters, click **Advanced**, complete the parameters and then click **OK.**

5. As you type search words, results are displayed beneath the **Search** field.

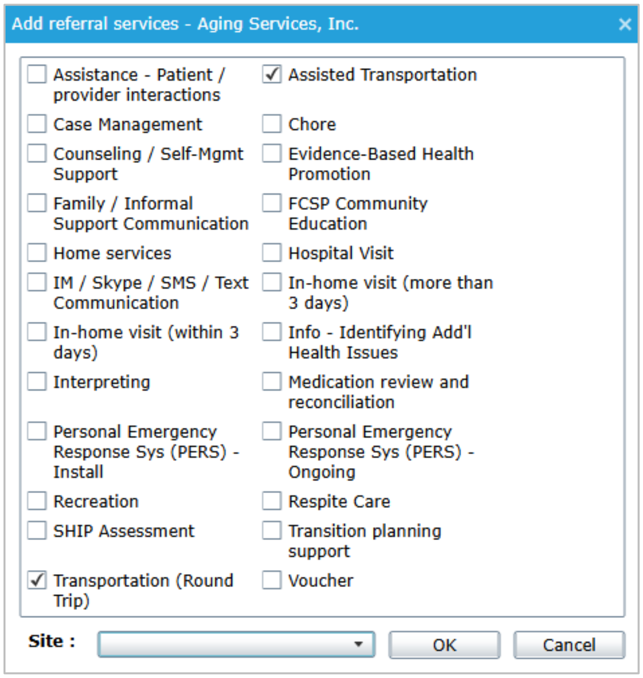
6. To add the provider to the referral, click **Add.**

a. To display additional details about the provider, such as their phone number and hours of operation, click **Show More.**



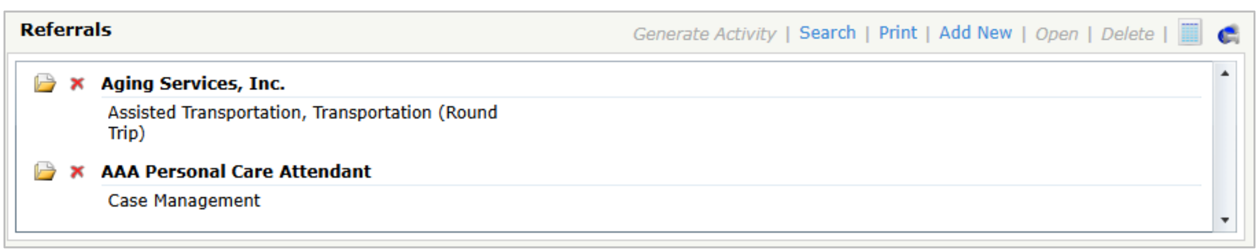
7. Select the services to add to the referral, and select a **Site**, if applicable.

8. When finished, click **OK.**



9. Continue to locate services and providers and add referrals as needed. When all referral services have been selected, click **OK** in the lower right corner of the screen.

10. The referrals are added to the call record.



Add assessments

You can start an assessment from within a call or from a consumer record.

1. From the **Navigation** bar, click **Calls.**

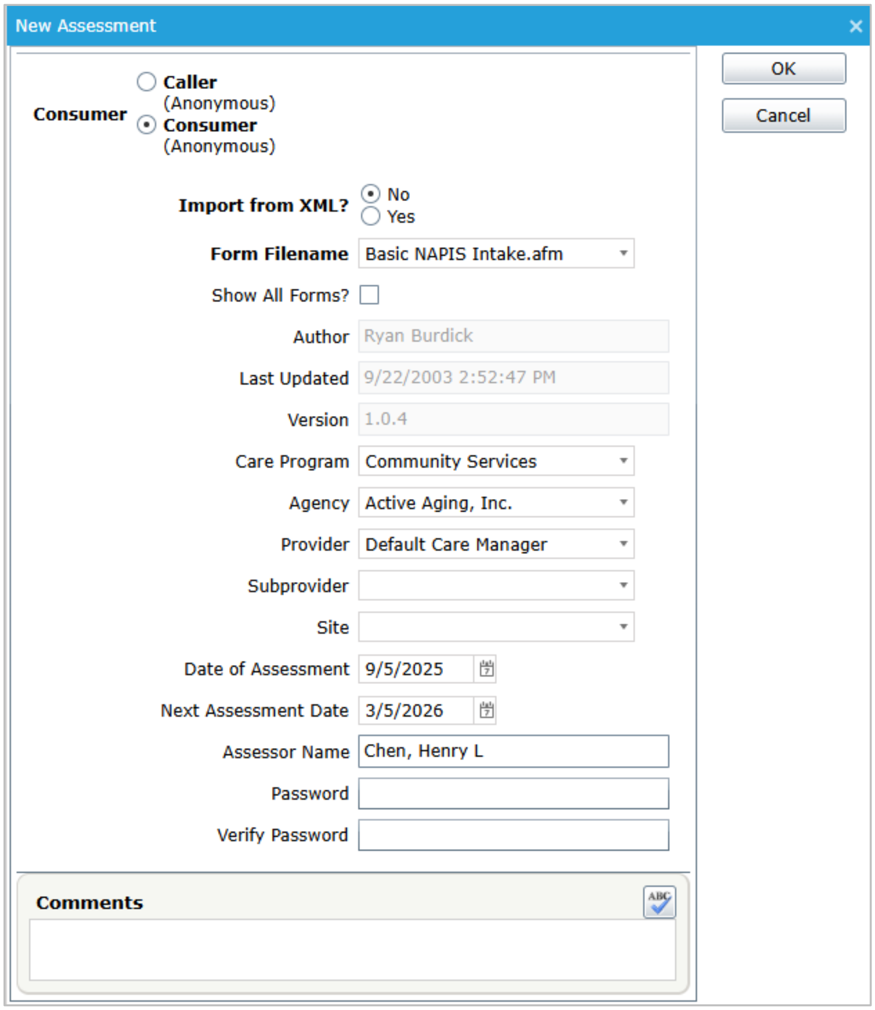
2. Select **Calls** and then open the call you want to work with.

3. If the **Assessment** pane is not displayed, click the arrow in the **Add New** field on the **Calls** toolbar and then select **Assessment.**

4. If the caller and consumer are both anonymous, select the entity for whom the assessment is for.

5. Complete fields, as needed, then click **OK**.

6. Click **OK.**



7. Complete the assessment. For more information on completing assessments, see the *Aging & Disability User Guide* on the WellSky Customer Portal and the Client Resource Center.

8. When finished, click **Save and Close.**

Edit assessments

As you gather more information about the caller/consumer, you will need to edit an assessment.

1. From the **Navigation** bar, click **Calls.**
2. Select **Calls** and then open the call you want to work with.

TIP - If the consumer is named, you can open the assessment from the consumer record.

3. In the **Assessments** pane, open the assessment you want to work with.
4. With the assessment open, go to the question or field you want to edit.
5. For more information on searching in and completing assessments, see the *Aging & Disability User Guide* on the WellSky Customer Portal and the Client Resource Center.
6. Make the needed changes.
7. Click **Save and Close**.

Order services

Services are items that you may order for a caller/consumer and can include things like home-delivered meals, personal care assistance, or financial services.

Many organizations create Service Templates to make data entry more efficient. Check with your Aging & Disability administrator to see if they are configured in your organization. Services can also be recorded manually.

NOTE - The Aging & Disability I&R Module can be configured in many ways. Check with your Aging & Disability administrator for more information on how your organization's solution is configured.

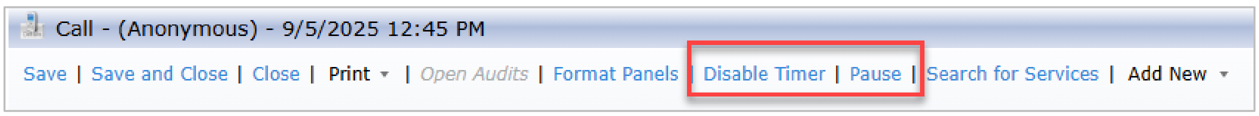
Call timer

When a new call is added, a timer automatically starts to track the time spent on the call. When the call is identified as complete, the timer stops, and the total time is calculated.

Disable or pause the call timer

1. To disable the call timer and stop tracking time, click **Disable Timer** on the **Call** toolbar.

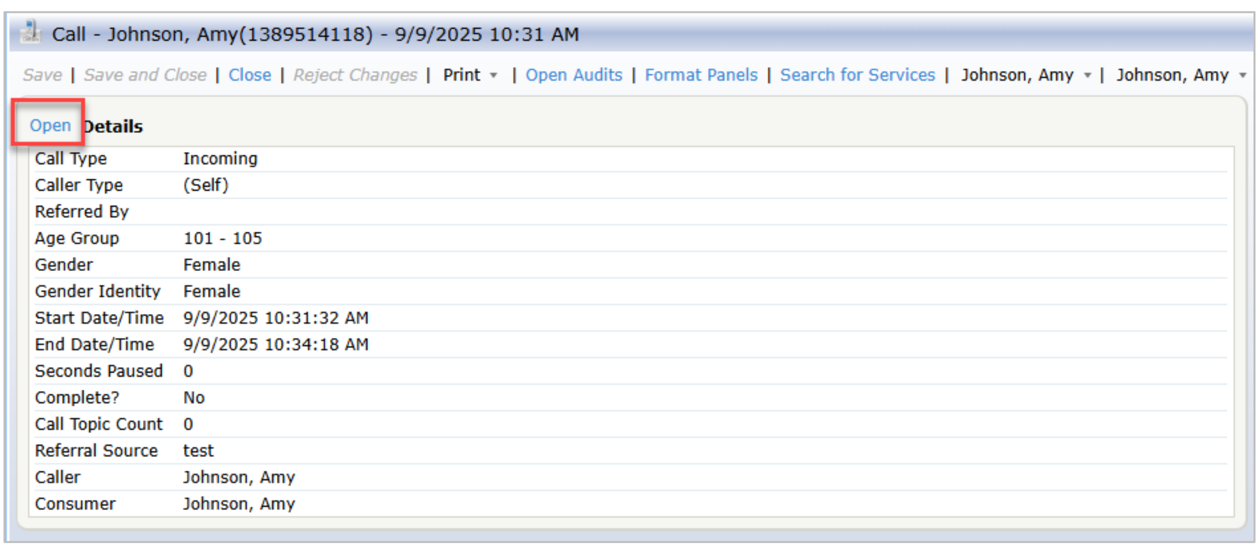
2. To temporarily stop the timer, click **Pause** on the **Call** toolbar. To start the timer again, click **Resume**.



Complete a call record

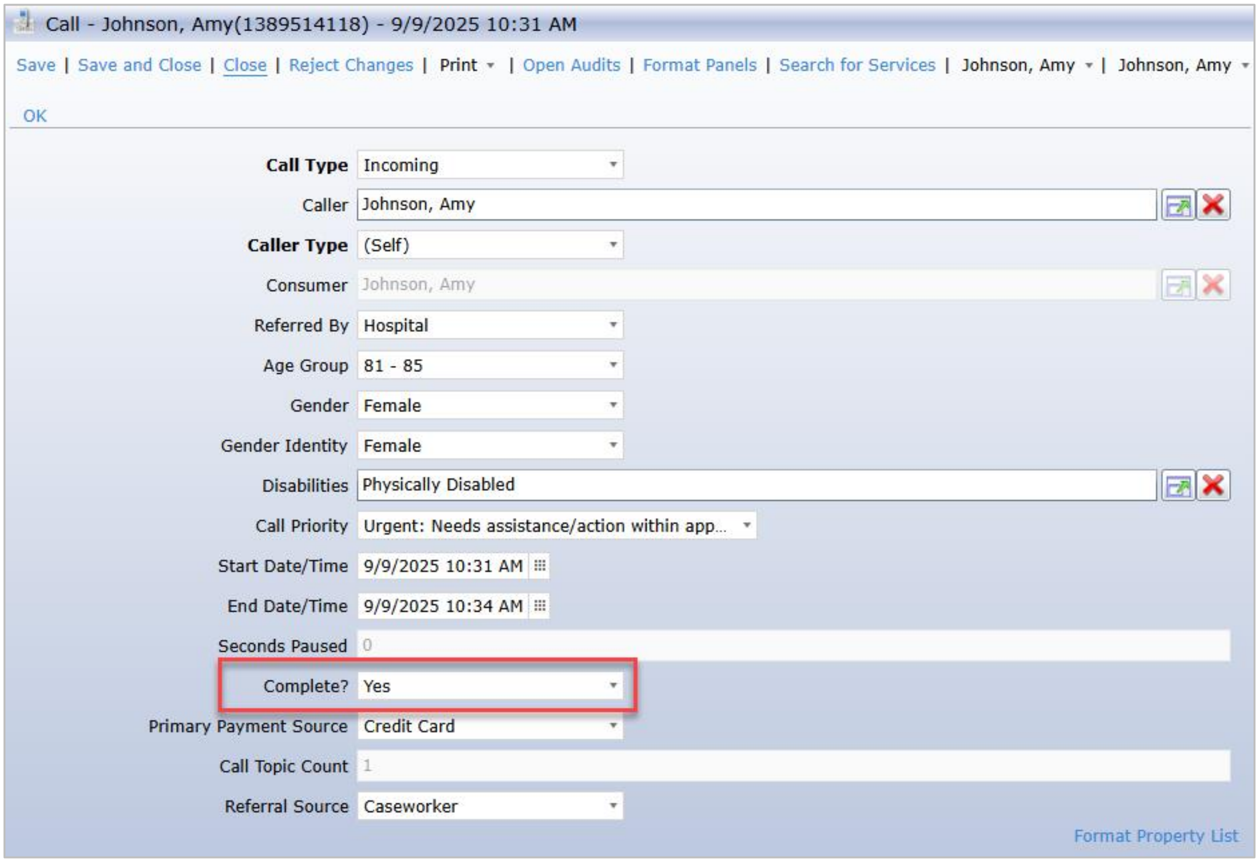
When a call is finished, the call record is identified as complete. By completing the call, the End Date/Time is automatically added to the Call Details, and the timer stops.

1. Open the call if needed and navigate to the Call Details section. To open the Call Details section, click **Open** in the call record.



2. In the **Complete** field, select **Yes**.

3. Click **Save and Close**.



Service delivery templates

When logging a call, services that will be provided must be identified. Service delivery templates allow users to add services to calls, without having to open a separate services window within the solution. In addition, they allow users to select multiple services at a time.

Create a service delivery template

There are two ways to set up a service delivery template:

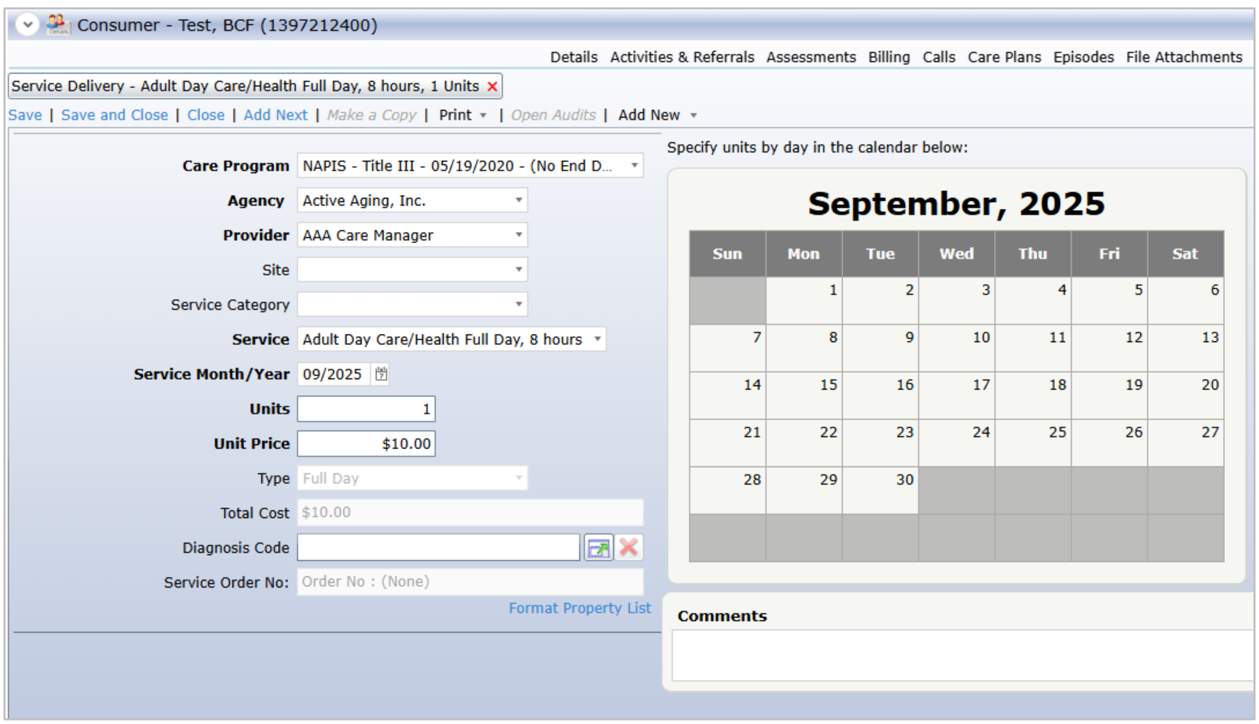
- From a new service delivery record; OR
- From an existing service delivery record.

TIP - Best Practices recommend that you first set up a new Service Delivery Template with a test consumer record, to ensure the template works correctly.

Create a template from a new service delivery

1. Open a test consumer record.
2. Click **Service Deliveries** in the record toolbar.

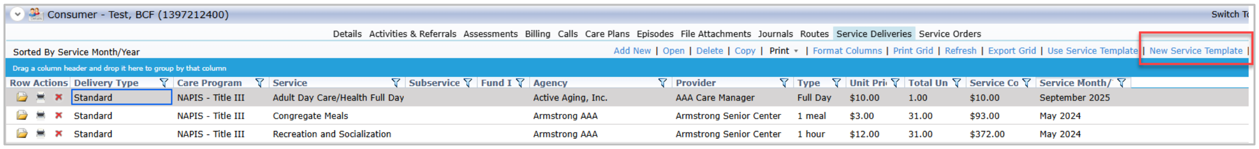
3. Click **Add New**.
4. Complete the required fields, indicated by a bold font, then the remaining fields, as needed. For more information, see the *Aging & Disability User Guide*.
5. Enter the number of units, either by typing the number in the **Units** field or by entering the number of units that will be delivered on certain days into the calendar.



TIP - If you are working with a test consumer, any date will suffice. If you are working in a live consumer record, select a Service Month/Year that is one month in the future. Using a date in the future allows you to quickly identify which test service needs to be deleted after the template is created and tested.

6. Click **Save and Close.**

7. Select the service delivery you created and then click **New Service Template.**

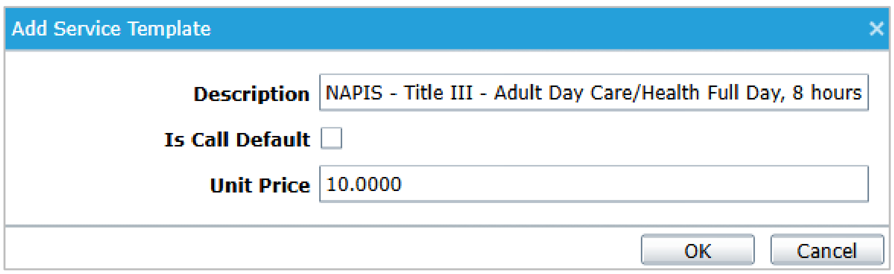


8. Add a **Description**, which will be the name of the Service Delivery Template.

9. Select **Is Call default** if this is the template you will use most often.

10. Adjust the **Unit Price**, if needed.

11. When you're finished, click **OK**.



WARNING - If you were working with the service deliveries of a live consumer record, delete the service delivery you created to avoid creating duplicate service deliveries.

Create a template from an existing service delivery

1. Select the service delivery record on which you want to base the template.

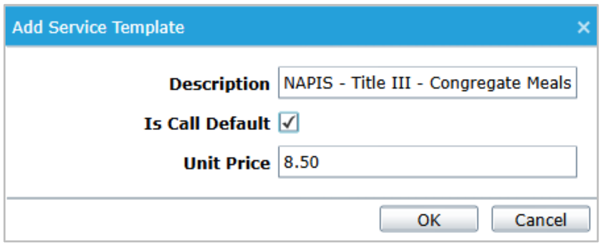
2. On the **Consumer** toolbar, click **New Service Template**.

WARNING - Ensure that the service delivery you selected was created by you and has you listed as the provider. If you create a service delivery template from a service delivery that was created by another person, the provider will be incorrect in your template.

3. Add a **Description**.

4. Select **Is Call default** if this is the template you will use most often.

5. When you're finished, click **OK**. The service delivery template is now available for use.

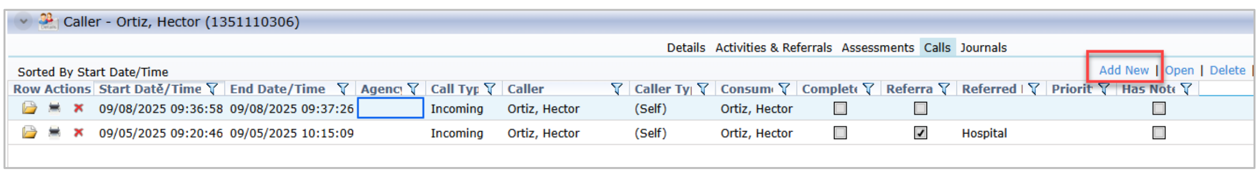


Use service delivery templates

When logging a call for a consumer, use a service delivery template to reduce the data entry time. By using a template, you can also save time by adding service deliveries from the call screen, rather than having to open another pane in the consumer's record.

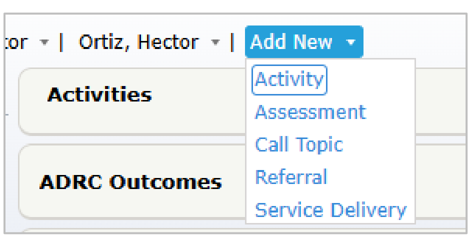
1. Open the consumer record.

2. Click **Calls** and then click **Add New** on the consumer record toolbar.



3. In the **Service Deliveries** pane, click **Add New**.

TIP – If the Service Deliveries pane is not displayed, click **Add New** on the **Calls** toolbar and select **Service Delivery**.



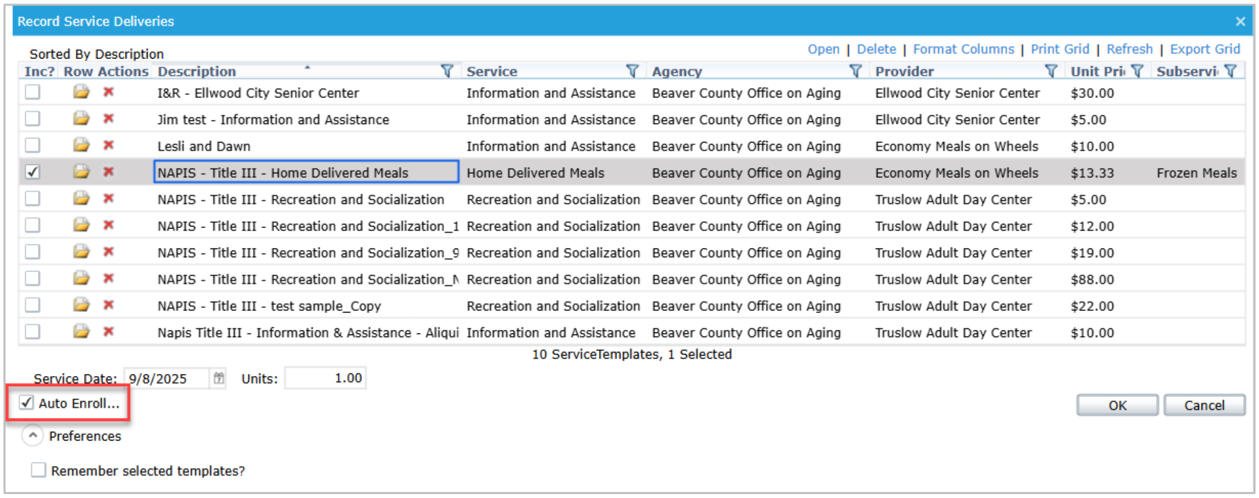
4. Select the service template.

5. Change the **Service Date**, if needed, and enter the number of **Units**.

6. To automatically enroll the consumer in the care program associated with the service delivery, select the **Auto Enroll** check box, located in the **Preferences** section.

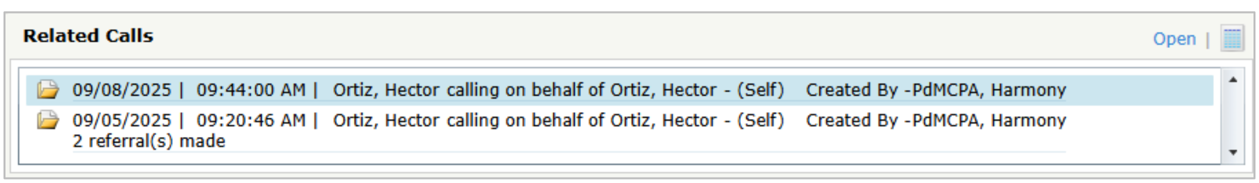
7. Select **Remember selected templates** to use the same template for the consumer's future service deliveries.

8. Click **OK**. The service delivery is added to the consumer record.



Call history

When you're working with consumer records, there may be a history of previous calls related to the consumer. These calls are displayed in the consumer record, in the **Related Calls** pane.



Display call history from a call

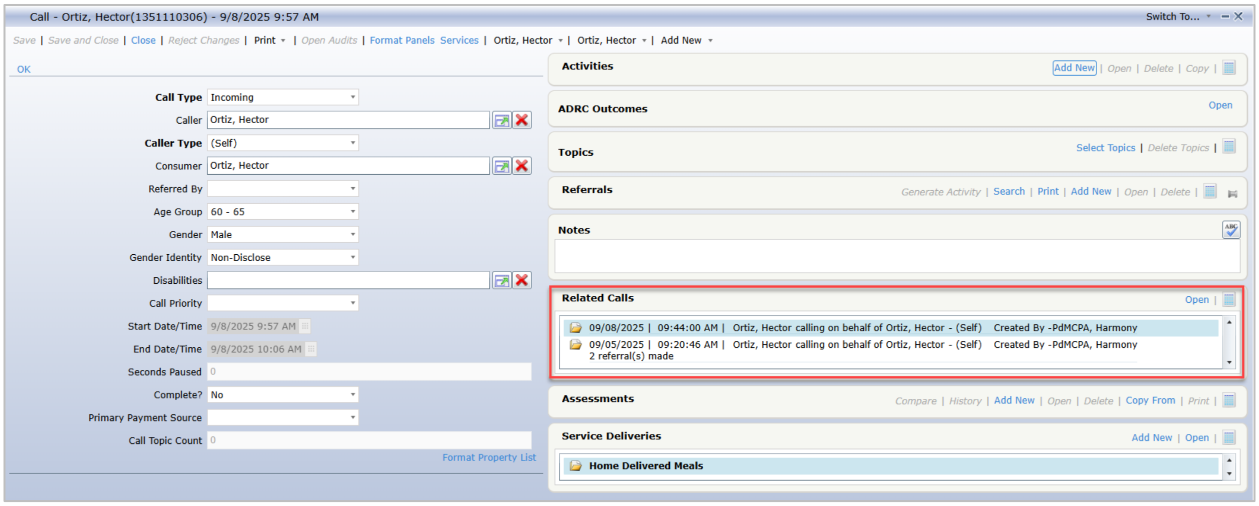
Follow the steps below to display related calls when you are working on a call record.

1. From the **Navigation** bar, click **Calls.**

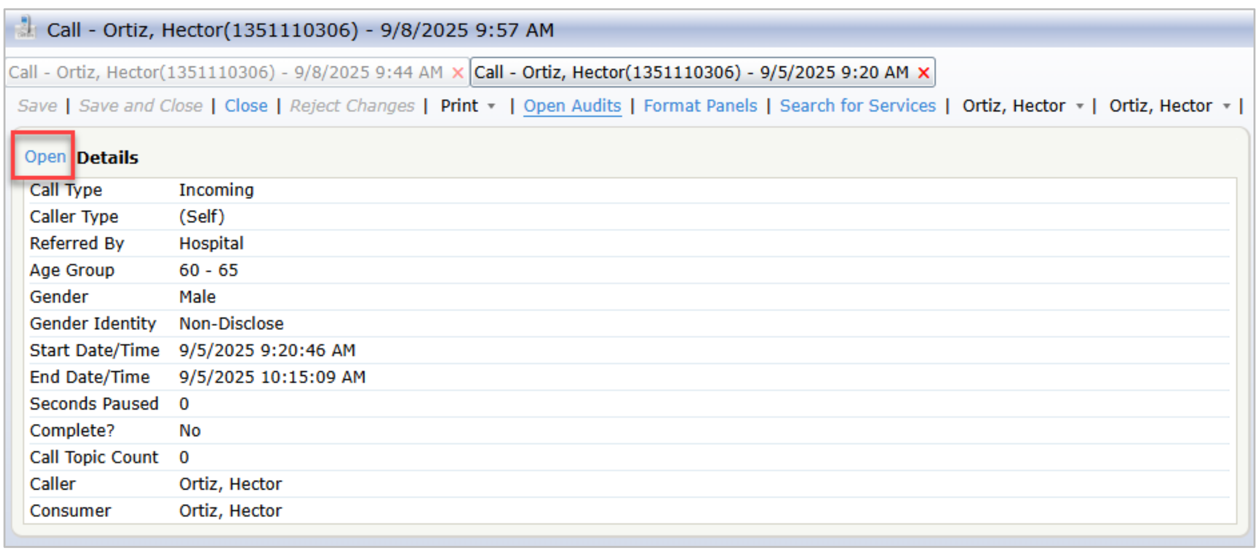
2. Select **Calls** and then search for the call you want to work with.

3. While in the call, the **Related Calls** pane is displayed.

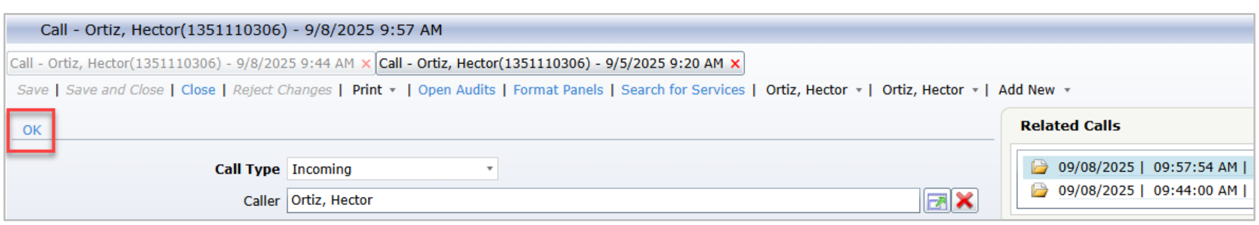
4. To display a related call, click **Open** in the record.



5. To view additional details, click **Open** in the **Details** pane.



6. Click **OK** to close the open call record.

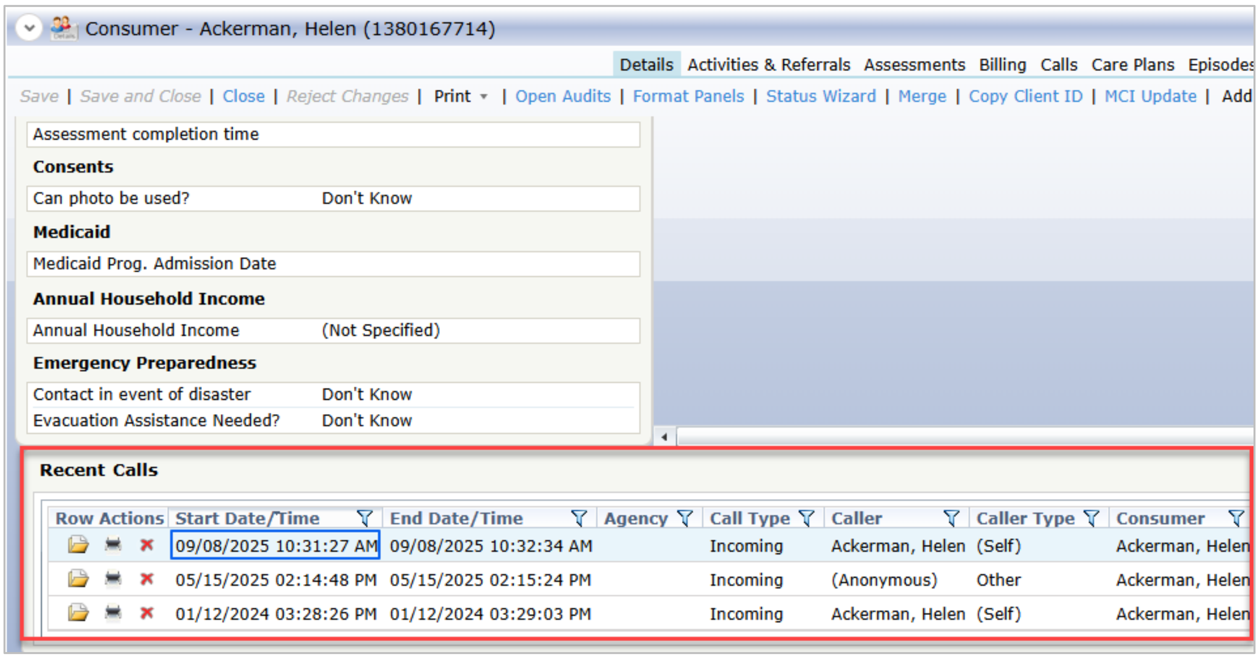


Display call history from the consumer record

You can view a call history within the consumer's record.

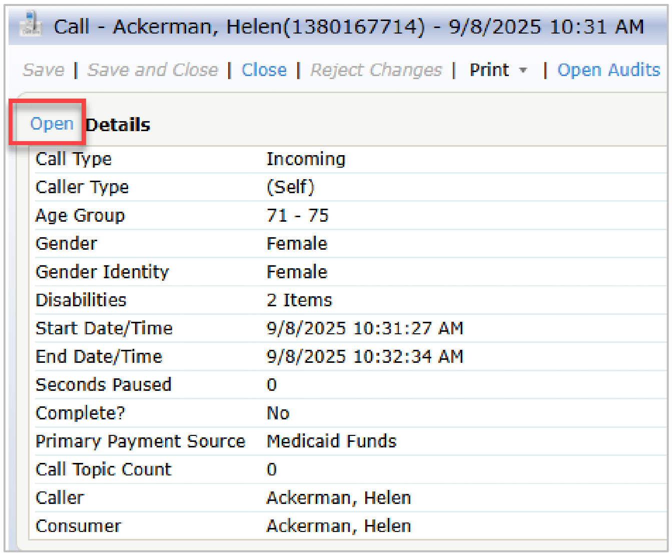
1. Search for and open the consumer record.

2. Calls are displayed in the **Recent Calls** pane. You may need to scroll to the bottom of the consumer record to see this pane.



3. To display details about a call, double-click the record.

4. Click **Open** to view additional details**.**



5. To close the call record, click **OK.**

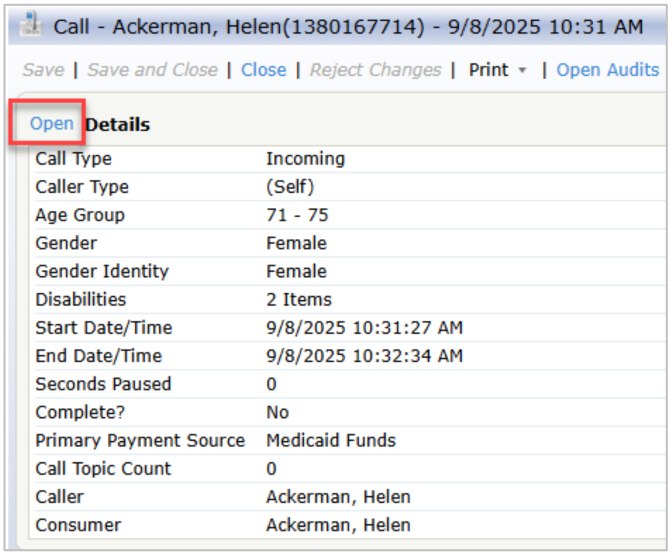
Edit a consumer record

The consumer record can be edited if your user account has the appropriate privileges.

Call Details section

1. After searching for and opening a consumer record, double-click the call record you want to work with on the **Recent Calls** screen.

2. In the **Details** section, click **Open.**



3. Make edits to the record, as needed.

   a. Click **OK** to close the **Call Information** section.

   b. Click **Save** to save the changes and keep the record open.

   c. Click **Save and Close** to save your changes and close the record.

   d. Click **Close** to close the record without saving changes and closing the record.

Add a caregiver

Often, family members, neighbors, and friends will help care for a consumer. In the Aging & Disability I&R Module, they are known as Caregivers, and they may be eligible for services.

NOTE - Federal guidelines state that the caregiver and care recipient relationship is reported annually, along with the services that both parties have received.

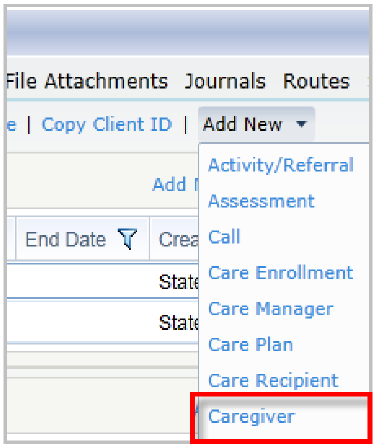
Because of federal guidelines, both the caregiver and the care recipients must have consumer records. These records are linked together in the Aging & Disability I&R Module.

For the most up-to-date information on NAPIS reporting and the caregiver/care recipient relationships, see the NAPIS reporting documentation on the Customer Portal and the Client Resource Center.

The caregiver can be added to the care recipient record or the caregiver record. The following procedure adds a caregiver to a care recipient's record.

1. Open the Care Recipient's consumer record. This is the consumer record and not their call record.

2. On the **Consumer Record** toolbar, click the arrow in the **Add New** field, and then select **Caregiver**.



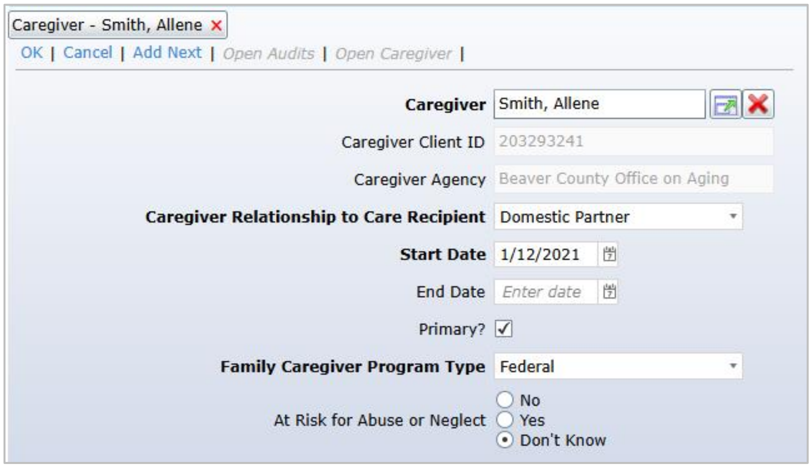
3. In the **Caregiver** field, click the **Open Dialog** button to verify if the caregiver has a record in Aging & Disability.

4. Type the search criteria and then click **Search**.

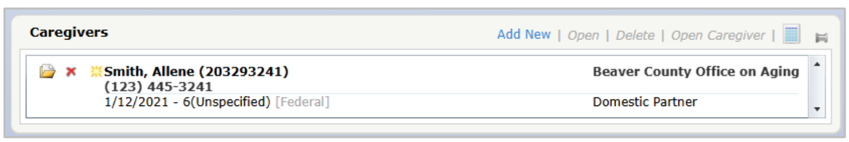
5. If a matching record is found, double-click it.

   a. Select the **Caregiver Relationship to Care Recipient** and edit other data, as needed.

b. When you're finished, click **OK**.

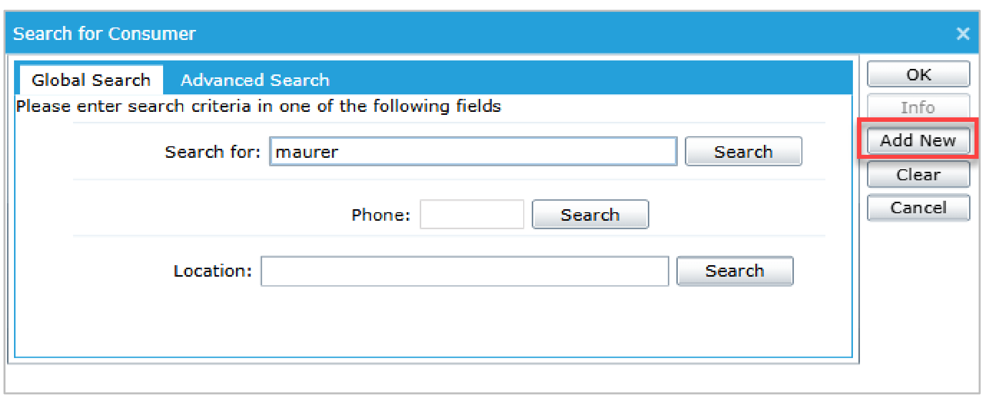


c. The Caregiver is added to the consumer record.



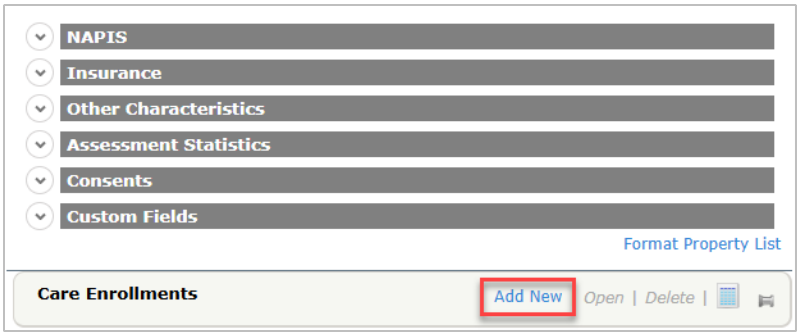
6. If no matches are found, click **OK.**

a. Add a new consumer record for the caregiver by clicking **Add New.**



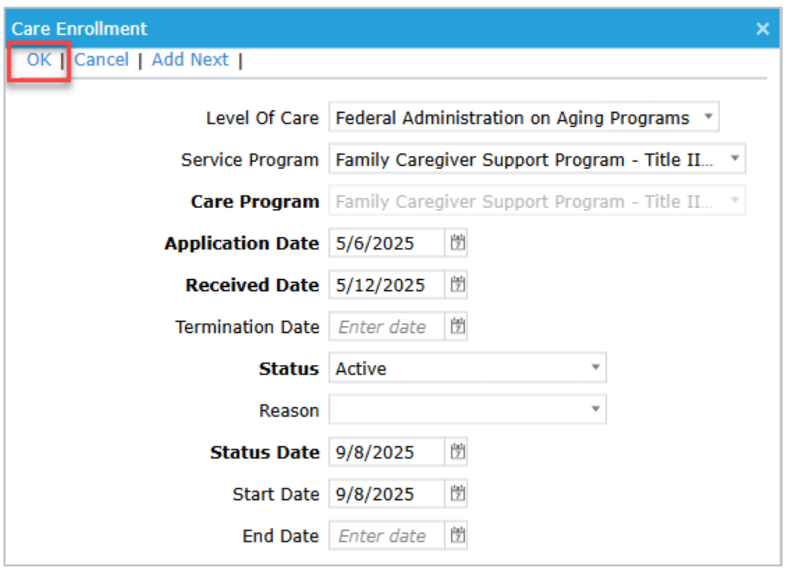
b. Complete the required fields, indicated in bold, and other fields, as needed.

c. Scroll down to the bottom of the screen and in the Care Enrollments section, click **Add New**.



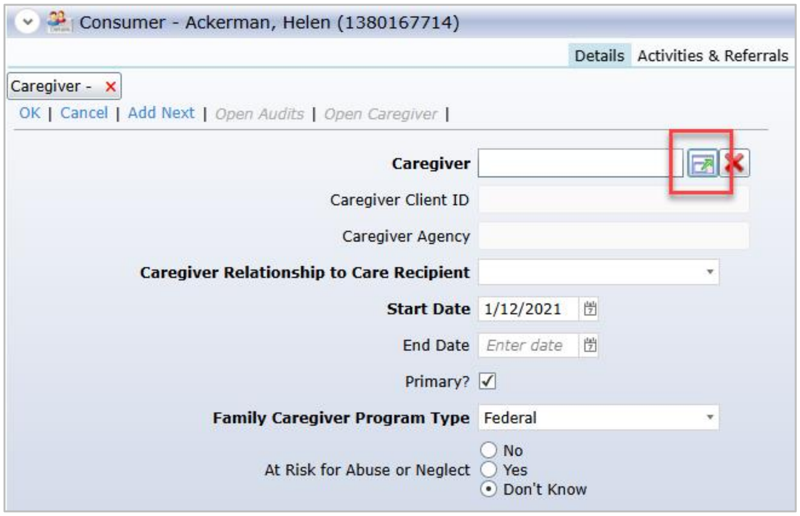
d. Complete the required fields, indicated in bold, and other fields, as needed.

e. When finished, click **OK**.



f. On the Add Consumer screen, click **OK** to finish adding the Caregiver to the consumer record. You will automatically be brought to the Caregiver section of the consumer record.

7. Click the **Open Dialog** button.



8. Double-click the recently added caregiver.

9. In the **Caregiver Relationship to Care Recipient** field, click the arrow to see more options and then select the relationship.

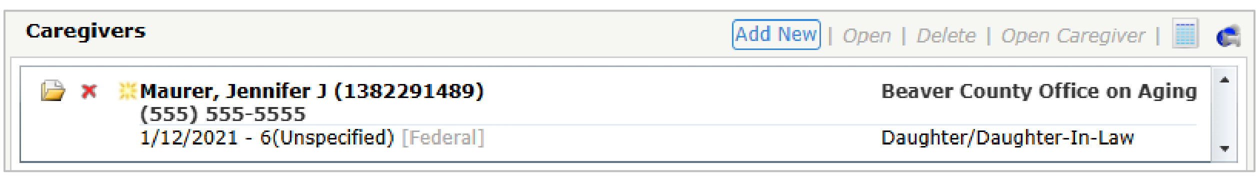
10. Edit the **Start Date**, if needed. The start date must be before the service delivery dates.

11. In the **Family Caregiver Program Type**, click the arrow to see more options and then select the program.

12. Complete the rest of the fields, as needed.

13. Click **OK.**

14. The caregiver is now displayed in the **Caregiver** pane in the consumer record.



15. Click **Save and Close** to save changes to the care recipient's consumer record.

TIP - The same process can be done from the caregiver record. In the **Add New** field on the caregiver's consumer record toolbar, select **Care Recipient** rather than **Caregiver.**

Aging & Disability I&R reports

The Aging & Disability I&R Module includes several standard report templates you can customize to meet your organization's needs.

Reports templates are displayed in the upper portion of the screen. When you click a report template, the custom **Report Definitions** that have been created from the template are displayed in the lower portion of the screen.

For a complete list of I&R reports, see the Appendix.

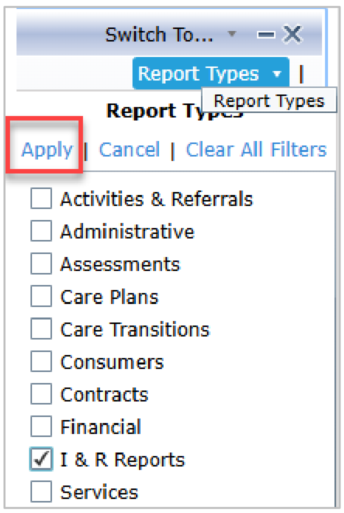
Create a report definition

A report definition allows you to customize standard reports that are included with Aging & Disability. The report definition can be saved for future use and can be shared with others.

1. From the **Navigation** bar, click **Reports.**

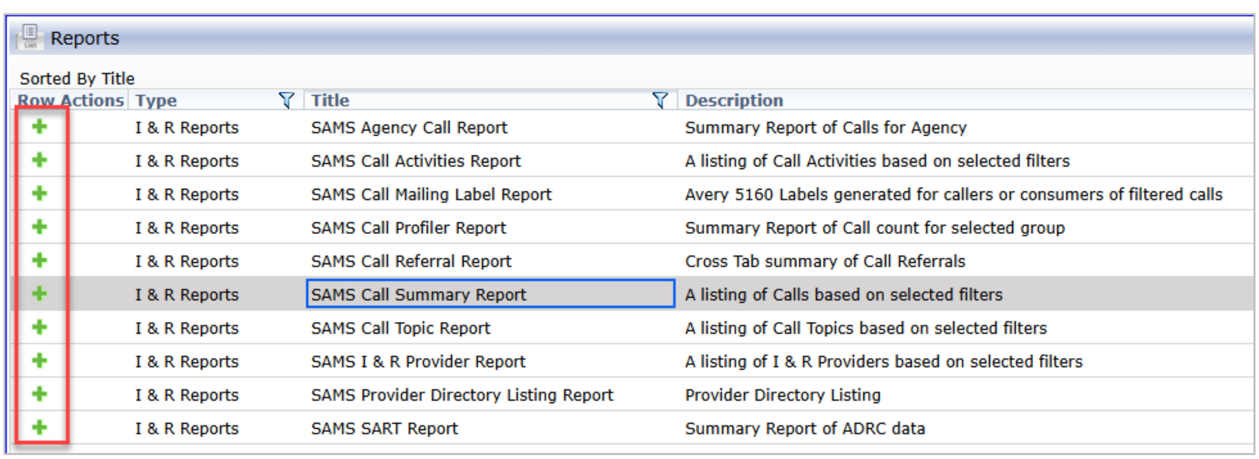
2. In the upper right corner of the screen, click the arrow in the **Report Types** menu and select **I & R Reports**.

3. Click **Apply** to display a list of I&R Reports.



TIP – Standard reports are displayed in the upper part of the screen, and customized report definitions are displayed in the lower part of the screen.

4. Select the report by clicking **Add new report** in the Row Actions column.



Reports

Sorted By Title

Row Actions	Type	Title	Description
+	I & R Reports	SAMS Agency Call Report	Summary Report of Calls for Agency
+	I & R Reports	SAMS Call Activities Report	A listing of Call Activities based on selected filters
+	I & R Reports	SAMS Call Mailing Label Report	Avery 5160 Labels generated for callers or consumers of filtered calls
+	I & R Reports	SAMS Call Profiler Report	Summary Report of Call count for selected group
+	I & R Reports	SAMS Call Referral Report	Cross Tab summary of Call Referrals
+	I & R Reports	SAMS Call Summary Report	A listing of Calls based on selected filters
+	I & R Reports	SAMS Call Topic Report	A listing of Call Topics based on selected filters
+	I & R Reports	SAMS I & R Provider Report	A listing of I & R Providers based on selected filters
+	I & R Reports	SAMS Provider Directory Listing Report	Provider Directory Listing
+	I & R Reports	SAMS SART Report	Summary Report of ADRC data

5. In the **Details** section, complete the required fields, and optional fields, as needed.

    a. In the **Shared With** field, click the arrow, then select the organization with whom the report can be shared. Options include:

        i. **(None)**: Allows only the user who created the report to have access.

        ii. **(All)**: Allows all Aging & Disability I&R users to have access.

        iii. **Agency**: Allows all Aging & Disability I&R users of the same agency to which the author belongs to have access.

        iv. **Provider**: Allows all Aging & Disability I&R users of the same provider to which the author belongs to have access.

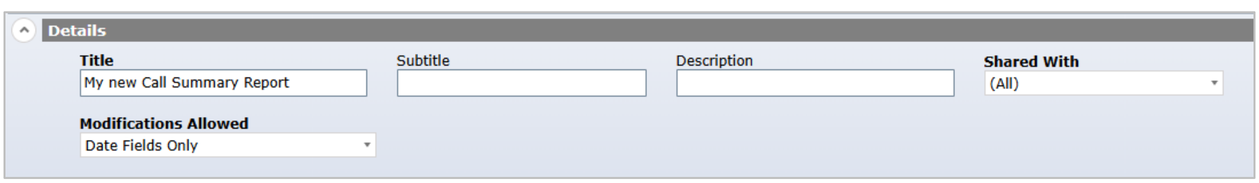
        v. **State Unit**: Allows all Aging & Disability I&R users of the same state unit to which the author belongs to have access.

    b. In the **Modifications Allowed** field, click the arrow, and then select the changes that can be made by users who have been granted access. Options include:

        i. **(None)**: Only the author can change report options and settings.

        ii. **(All)**: All users with access to the report can change report options and/or settings.

        iii. **Date Fields Only**: Any user with access to the report can change date fields, such as service start date and end date.



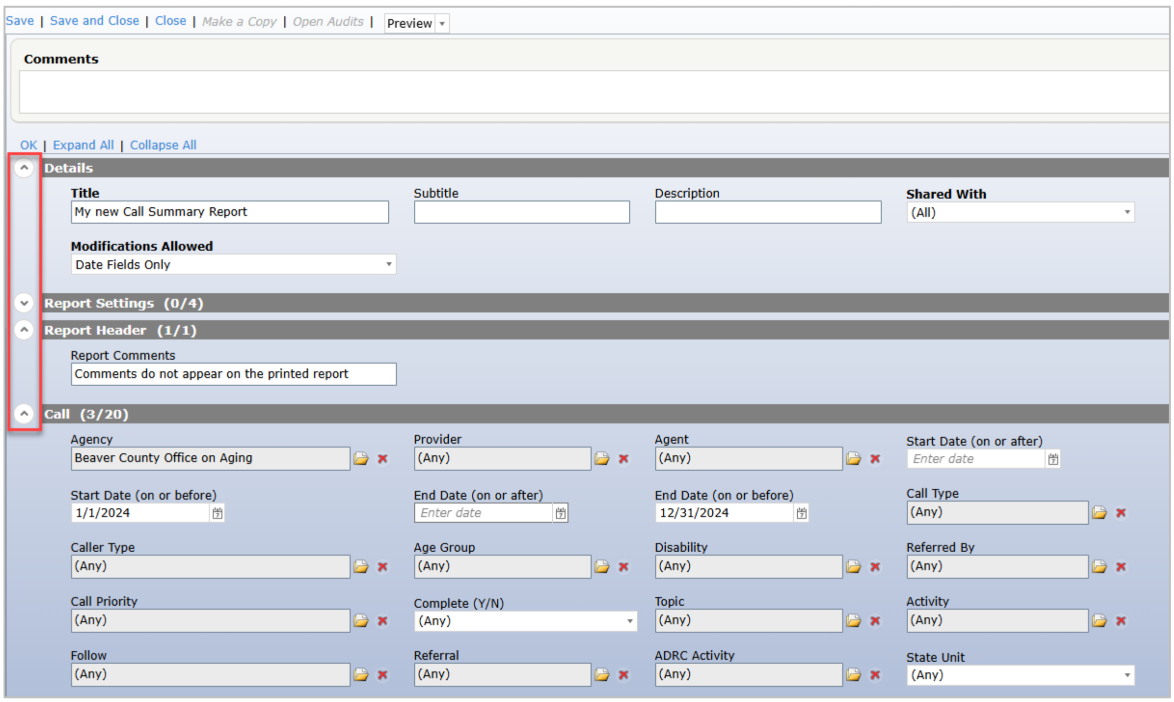
Select report filters

You can use many filters with Aging & Disability I&R reports, whether you're running a standard report or using a custom report template. Filters allow you to narrow the results to just the information you're looking for. On the Report Definition screen, additional filters are found below the Details section.

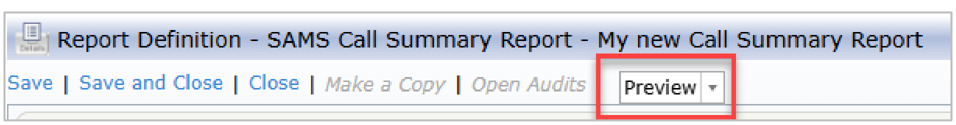
1. To display the filters that are available in each section, click the arrow to the left of the section title. The arrow changes to an upward-facing arrow**.** Click the arrow again to collapse the section.

2. Using the arrows in each field, set the report filters, as needed.

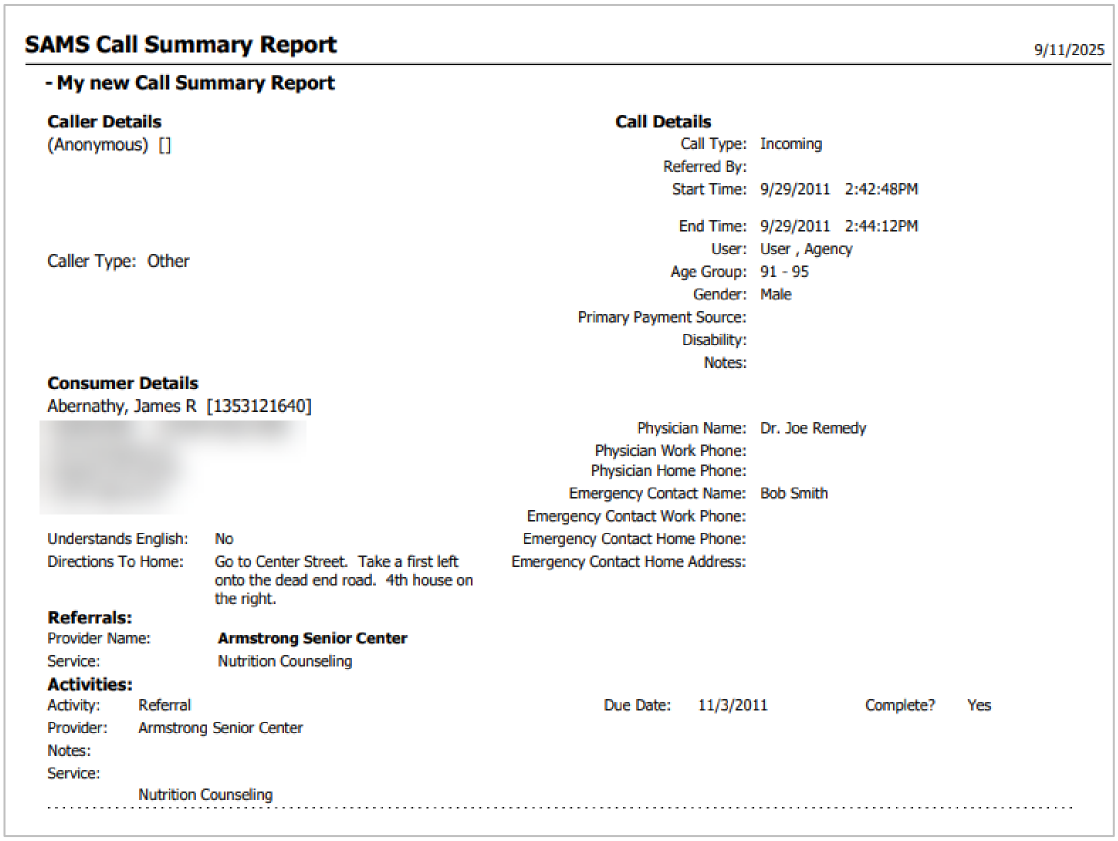
TIP - The numbers next to the section title display the number of filters that have been set for the report, out of the total number of filters that are available. In the screenshot below, one out of one filters have been set in the Report Header section and in the Call section, three filters have been set out of 20.



3. Once the filters have been selected, click **Preview.**



4. A preview of the report is displayed.



SAMS Call Summary Report 9/11/2025

- My new Call Summary Report

Caller Details
(Anonymous) []

Caller Type: Other

Call Details
Call Type: Incoming
Referred By:
Start Time: 9/29/2011 2:42:48PM
End Time: 9/29/2011 2:44:12PM
User: User , Agency
Age Group: 91 - 95
Gender: Male
Primary Payment Source:
Disability:
Notes:

Consumer Details
Abernathy, James R [1353121640]

Physician Name: Dr. Joe Remedy
Physician Work Phone:
Physician Home Phone:
Emergency Contact Name: Bob Smith
Emergency Contact Work Phone:
Emergency Contact Home Phone:
Emergency Contact Home Address:

Understands English: No
Directions To Home: Go to Center Street. Take a first left onto the dead end road. 4th house on the right.

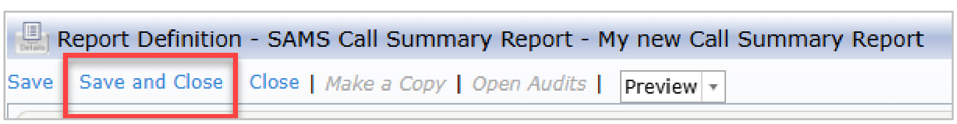
Referrals:
Provider Name: **Armstrong Senior Center**
Service: Nutrition Counseling

Activities:
Activity: Referral Due Date: 11/3/2011 Complete? Yes
Provider: Armstrong Senior Center
Notes:
Service:
Nutrition Counseling

5. If the results are not what you expected, close the preview, and then make changes to the filters and click **Preview** again.

6. Click the arrow next to the **Preview** button and select the format for the report.

7. To save the report definition, click **Save and Close**.



a. The report definition is saved.

Administrative setup

This section is for Aging & Disability administrators, and it assumes you are familiar with the Aging & Disability solution. For more information, see the *Aging & Disability Administrator Guide* on the WellSky Customer Portal and the Client Resource Center.

Aging & Disability is a highly configurable solution, and the I&R Module has its own set of configuration settings, which are covered in the following sections.

Access roles & privileges

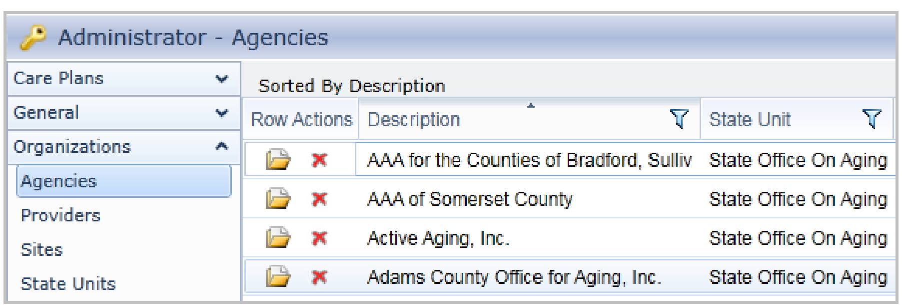
Access roles define a set of rules for authorization to areas of the solution and privileges define the actions that can be done in that part of the solution, such as create and update records. Before setting up access roles, user accounts and roles must be created first. See the *Aging & Disability Administrator Guide* for more information.

Edit privileges

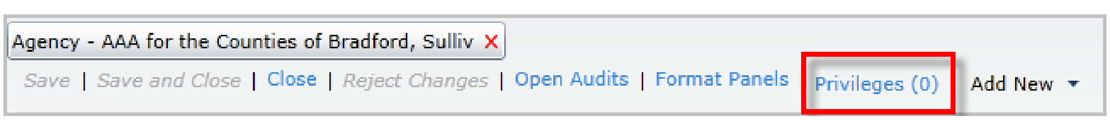
Agencies, providers, sites, and state units must be granted access to call records, then privileges are assigned to the Calls Module.

1. Click **Administrator > Organizations** in the **Navigation** bar. You may need to click the vertical ellipsis to see this option.

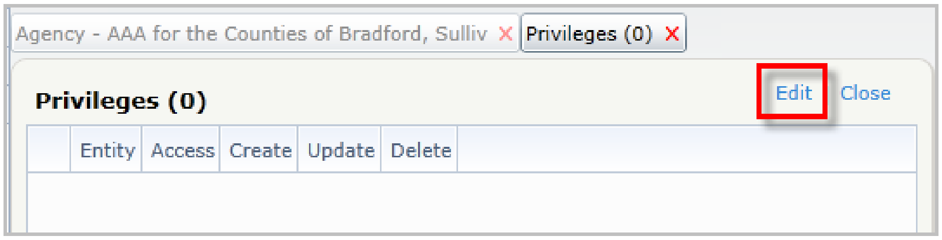
2. Select the organization type from the menu on the left, then open the entity by double-clicking the record or clicking **Open** in the record's row.



3. In the entity's record toolbar, click **Privileges.**



4. Click **Edit**.

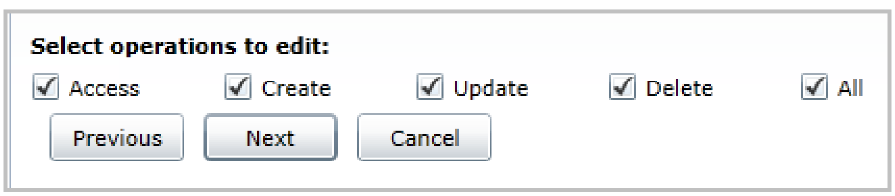


5. Select **Calls** and then click **Next.**

6. Select the actions that can be taken by users who have access to I&R calls and then click **Next.**

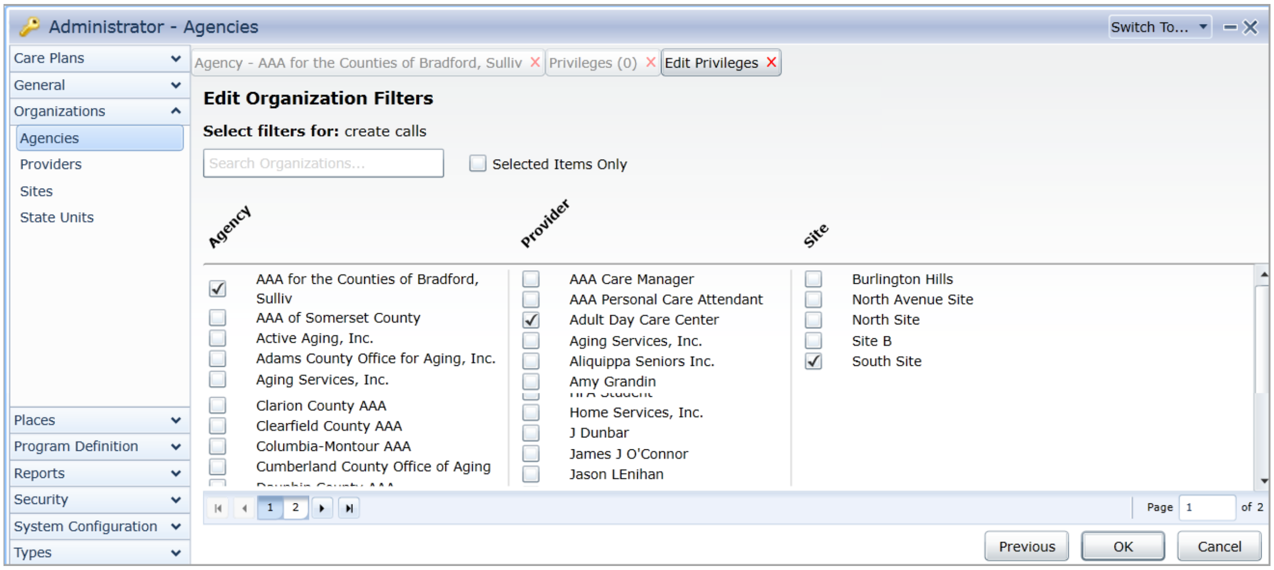
    a. In the screenshot below, full access is being granted to the call records.

7. Click **Next.**

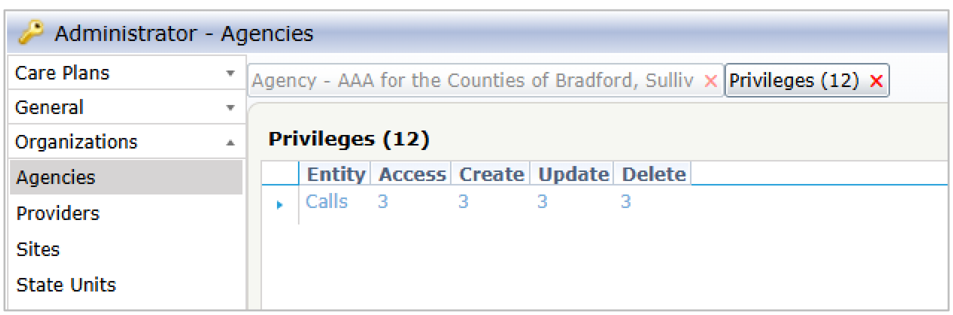


8. Search for or select the entity to which you want to grant access, either agencies, providers, sites, or state units.

9. Click **OK.**



10. A summary of the privileges is displayed.



11. Click **Close**.

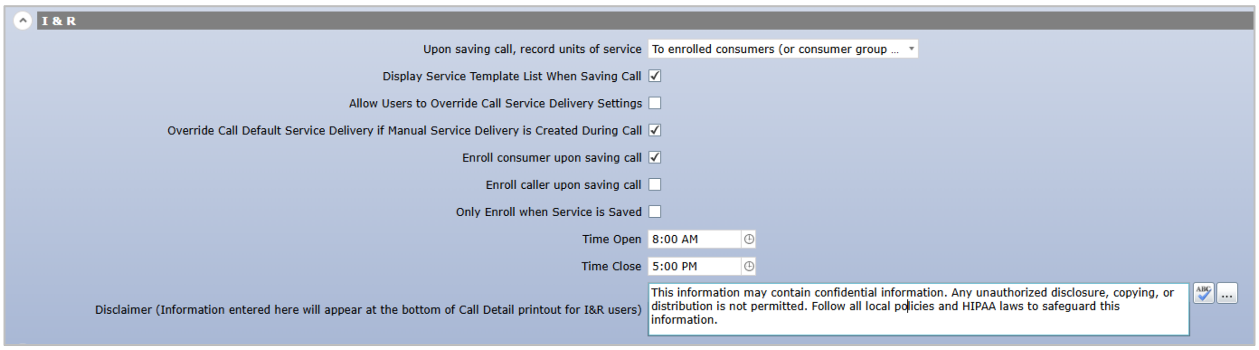
System configuration

Additional settings can be configured for the Aging & Disability I&R Module.

1. Click **Administrator** from the **Navigation** bar. You may need to click the vertical ellipsis to see this menu item.

2. Select **System Configuration** and then click **Global Settings.**

3. Scroll down to the I&R section and complete the fields.



   a. The table below describes the fields in the I&R section.

Field	Description
Upon saving the call, record units of service	Select how units of service are applied when the user saves the caller record. You can specify if Aging & Disability never adds the units of service for the consumer, automatically records units of service for a consumer (or a consumer group if the caller is anonymous), or if units of service are added for consumer groups only.
Display Service Template List When Saving Call	Select this option to display a list of Service Templates from which the user can select when a call is saved. Clear the option to automatically save the Service Template identified as the Call Default when the call is saved.
Allow Users to Override Call Service Delivery Settings	When this option is selected from **Administrator > Global Settings**, users can override services that are identified as "Is Call Default" when creating manual service deliveries. In addition, services identified as the call default *are also saved*. When editing an existing call, "Is Call Default" services are not added.
Override Call Default Service Delivery if Manual Service Delivery is Created During Call	When this option is selected from **Administrator > Global Settings**, users can override services that are identified as "Is Call Default" when creating manual service deliveries. Services identified as the call default *are not* saved. When editing an existing call, "Is Call Default" services are not added.
Enroll consumer upon saving call	Automatically enrolls a consumer in the default Care Enrollment program.

Field	Description
Enroll caller upon saving call	Automatically enrolls a caller in the default Care Enrollment program.
Only Enroll when Service is Saved	Enrolls the consumer in the default Care Enrollment program only when the service is saved.
Time Open / Time Close	Identifies the hours of operation for the I&R service.
Disclaimer	A statement, such as a confidentiality notice, which is displayed at the bottom of the Aging & Disability Call Summary Report.

4. When you're finished, click **Save**.

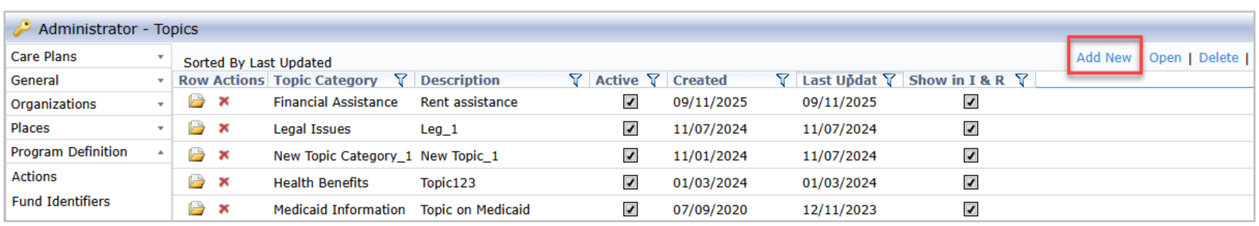
Add a Topic

Topics are used in many areas of the Aging & Disability solution, including the I&R Module. Topics refer to information that is discussed during a call, such as rent or transportation assistance. Topic categories are created first, then Topic Outcomes are defined. Finally, the Topics are identified and associated with Topic Outcomes and Topic Categories.

1. From the **Navigation** bar, click **Administrator > Program Definition**. You may need to click the vertical ellipsis to see this option.

2. Select **Topics.**

3. Click **Add New**.

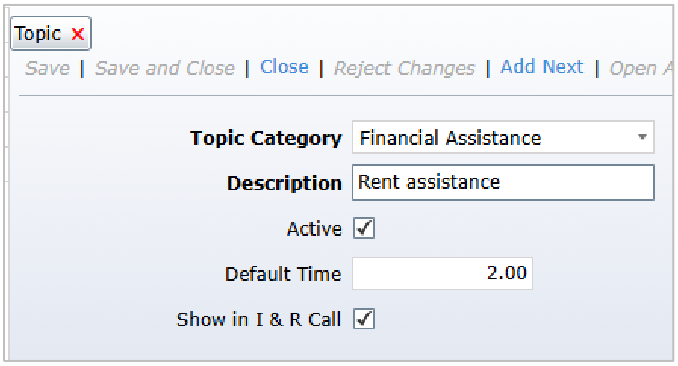


4. Select a **Topic Category** and add a **Description**.

5. Add a **Default Time**, if needed. This is the default time spent on the topic; however, users can edit the time if required.

6. To display the Topic in the I&R Module, select **Show in I & R Call.**

7. Click **Save and Close**.



Add a Topic Outcome

A Topic Outcome is the result of a topic that was discussed during a call.

1. Click **Administrator > Program Definition > Topic Outcomes**. You may need to click the vertical ellipsis to see the Administrator option.
2. Click **Add New** in the **Topic Outcomes** toolbar.
3. Verify the **Active** option is selected.
4. Type a **Description.**
5. If needed, add the **Additional Information Description** field.
6. Click **Save and Close**.

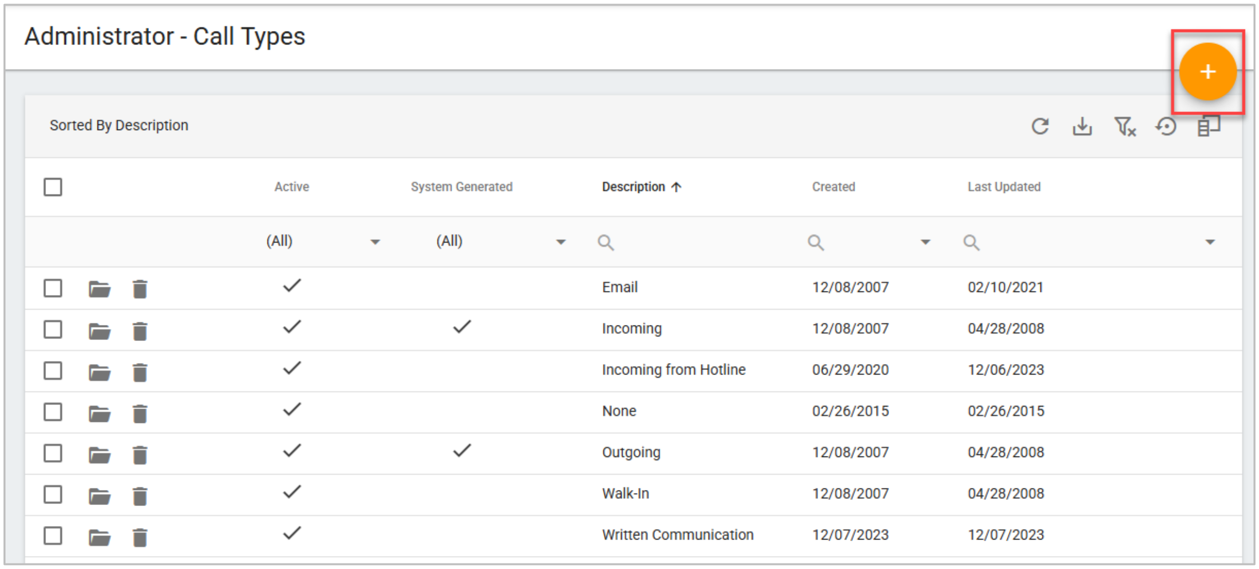
Add a Call Type

A Call Type categorizes incoming and outgoing calls. Aging & Disability includes these call types, and you can create custom Call Types for your organization.

1. Click **Administrator > Types**.

2. From the menu on the left, select **Call Types**.

3. Click **Add a new record** in the upper right corner of the screen.



4. The **Active** field defaults to **Yes**. Move the slider to the left to deactivate it.

5. Add a **Description** and click either **Save** or **Add Next**.

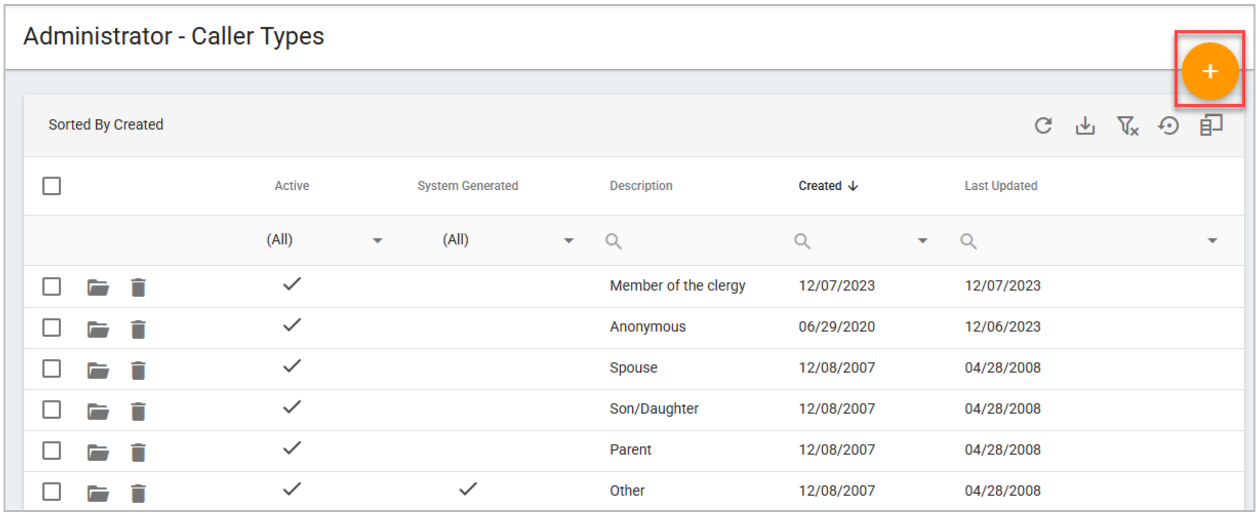
Add a Caller Type

Caller Types define the caller and their relationship to the consumer. Aging & Disability I&R includes default types of Self and Other, and you can create customized Caller Types for your organization.

1. Click **Administrator > Types**.

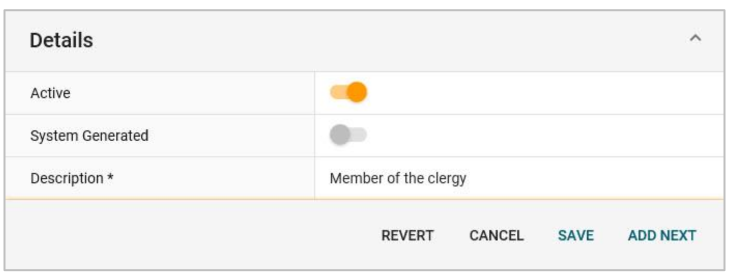
2. From the menu on the left, select **Caller Types**.

3. Click **Add a new record** in the upper right corner of the screen.



4. The **Active** field defaults to **Yes**. Move the slider to the left to deactivate it.

5. Add a **Description** and click either **Save** or **Add Next**.



Add a Call Priority

Organizations have the option to prioritize calls according to their business model. This is done by creating custom Call Priorities.

1. Click **Administrator > General > Priorities**.

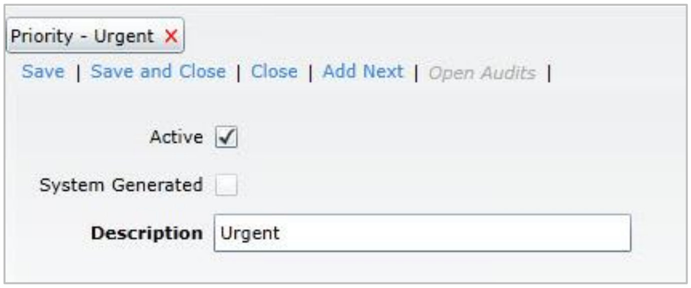
2. Click **Add New** in the **Priorities** toolbar.

    a. The **Active** option is selected by default. Clear the check box to deactivate it.

    b. The **System Generated** option identifies if the Call Priority is automatically included with the solution; it cannot be edited.

3. Add a **Description**.

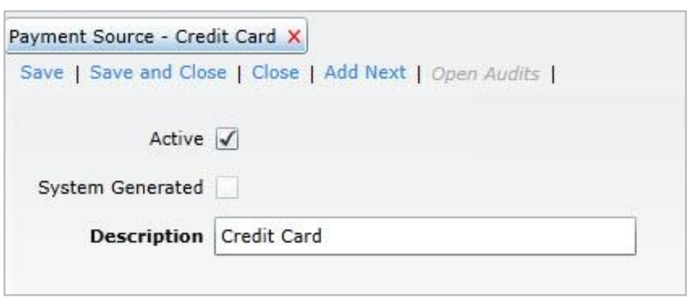
4. Click **Save** or **Save and Close**.



Add a Primary Payment Source

The Primary Payment Source is configured from the Administrator menu.

1. Click **Administrator > General > Payment Sources**.
2. Click **Add New** in the **Payment Sources** toolbar.
    a. The **Active** option is selected by default. Clear the option to deactivate it.
3. Add a **Description**.
4. Click **Save** or **Save and Close**.



Add a Referred By entry

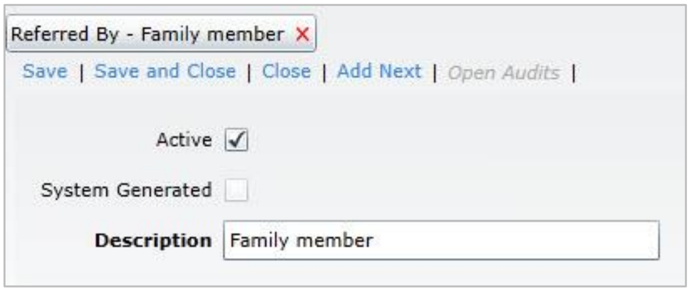
Referring callers/consumers for services is an important part of the I&R process and the user must be able to quickly find services. The Aging & Disability I&R Module allows users to search for referral services by a taxonomy code, services, eligibility, keywords, and disability, among others.

1. Click **Administrator > General > Referred By**.
2. Click **Add New** in the **Referred By** toolbar.

   a. The **Active** option is selected by default. Clear the option to deactivate it.

3. Add a **Description**.

4. Click **Save** or **Save and Close**.



Add a Referral Source

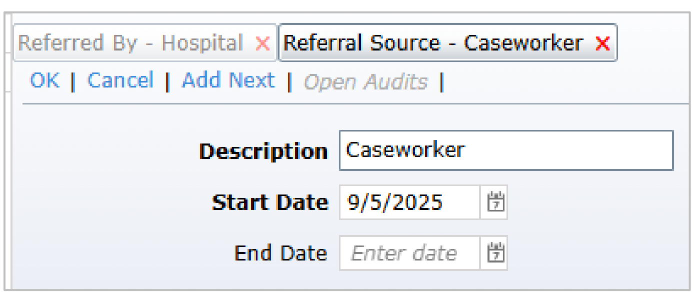
When the Referred By field is completed on the call record, a Referral Source field may be displayed, depending on how the administrator has configured the Referral Source list

1. Click **Administrator > General > Referred By.**

2. Open a Referred By record.

   a. If the Referral Sources pane is not displayed, click **Add New > Referral Source.**

3. Type a description of the referral source, then click **OK**. To add additional sources, click **Add Next**.



4. Click **Save and Close**.

Configure provider organizations

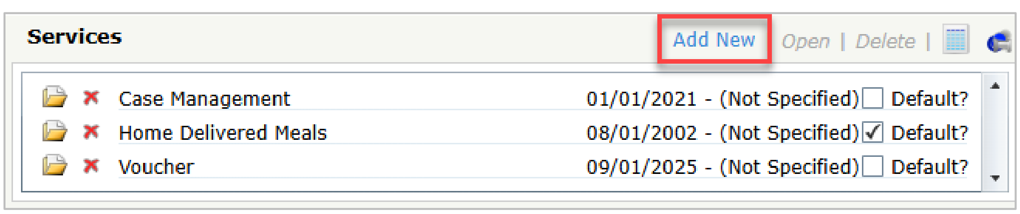
There are two types of providers in Aging & Disability: Care Managers and Provider Organizations, but only Provider Organizations are used with the Aging & Disability I&R Module. Provider organizations contain information that is useful for incoming calls, including hours of operation, location, and services.

1. Click **Administrator > Organizations > Providers.**
2. Double-click the provider record to open it. Most of the fields should already be configured, but the following fields are used specifically in the Aging & Disability I&R Module.

Services

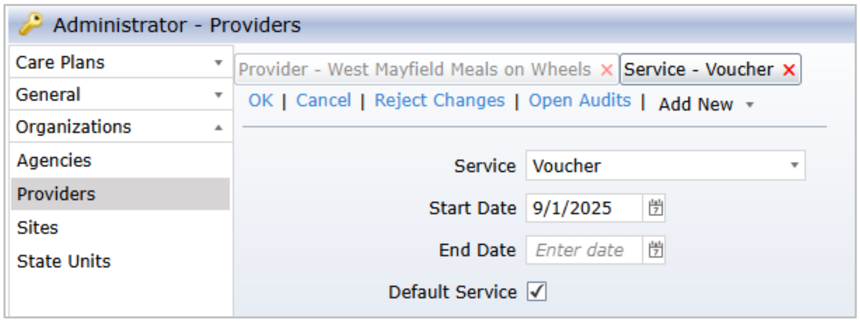
The **Services** pane lists the services that each provider offers to consumers. To add a new service:

1. Click **Administrator > Organizations > Providers**.
2. Double-click the provider record to open it.
3. In the **Services** pane click **Add New**. If this pane is not visible from the record toolbar, click **Add New** and then select **Service.**



4. Select a **Service** and a **Start Date**.
5. Type or select an **End Date**, if known.
6. If it is the provider's default service, select **Default Service.**

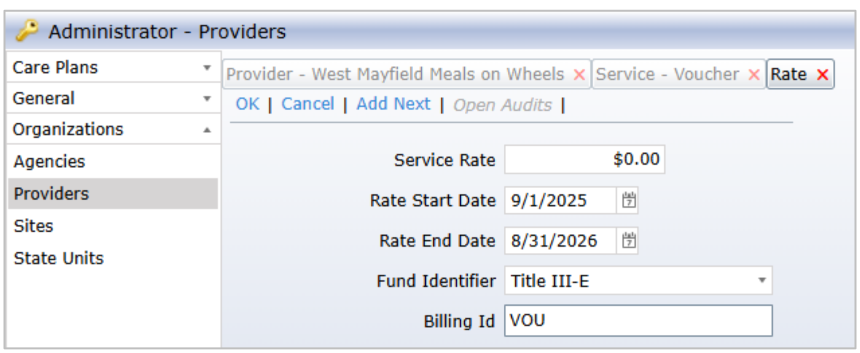
7. Click **OK**.



Add a rate

Each service can have one or more rates that are applied when the provider and the service are delivered to a consumer.

1. Click **Administrator > Organizations > Providers**.
2. Open the provider record and then open the service record.
   a. If the **Rates** pane is not displayed, click **Add New > Rate.**
3. Type a **Service Rate** and edit the remaining fields, if needed.
4. Click **OK** to save the rate or click **Add Next** to add additional rates.



5. Click **OK** to save the service record.
6. Click **Save and Close.**

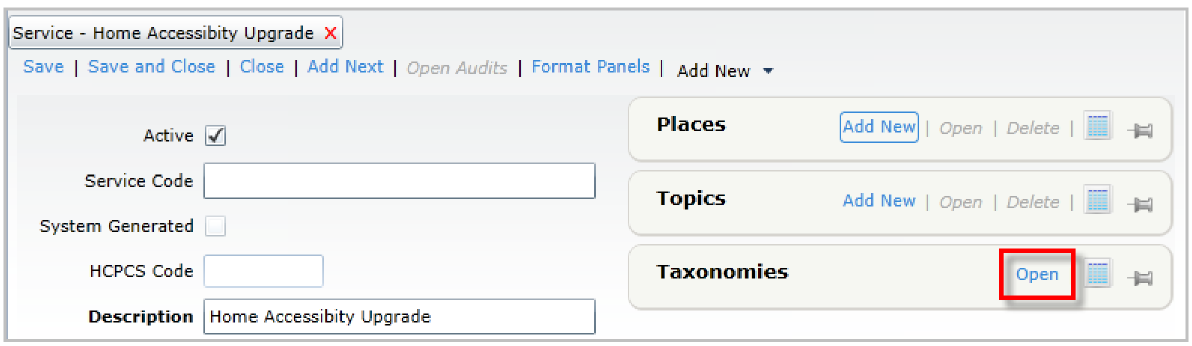
Add a taxonomy code

Although you cannot add, edit, or delete taxonomy codes, you can add taxonomy codes to each provider's services.

IMPORTANT! If you add service taxonomies, you MUST rebuild the cache. If the cache is not rebuilt, I&R users cannot use the terms to search for referrals. To rebuild the cache:

1. Click **Administrator** in the **Navigation** bar.
2. Select **System Configuration > Global Settings**.
3. In the toolbar, click **Rebuild Search Cache**.

1. Click **Administrator > Program Definition > Services.**
2. Open a service record.
3. In the Services record, click **Open** in the **Taxonomies** pane.

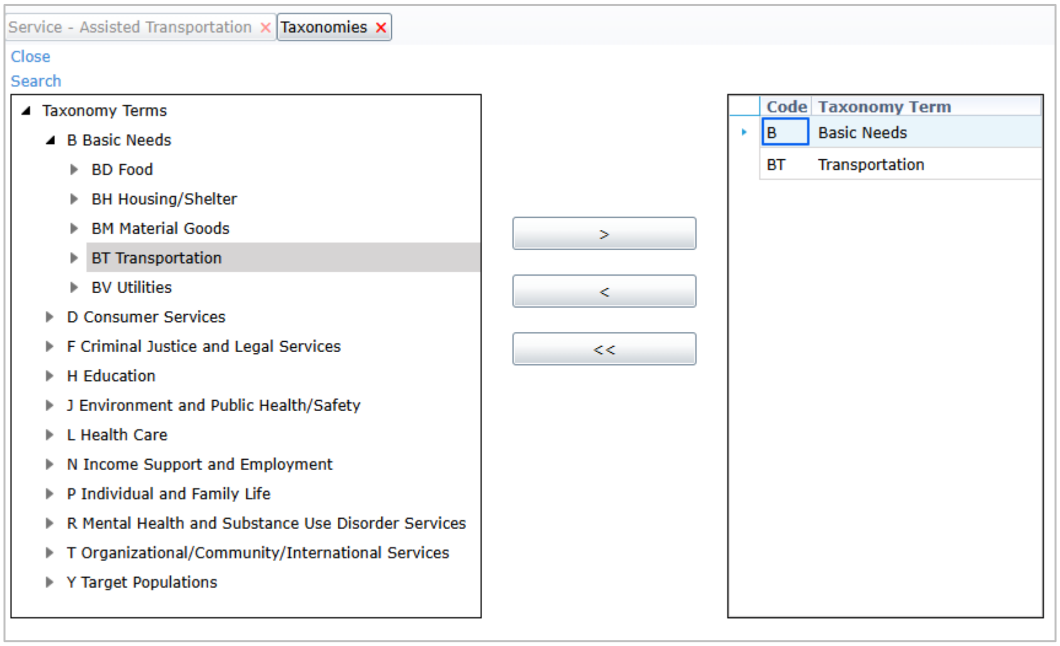


4. Expand the **Taxonomy Terms** list and select the **taxonomy code** for the service.

TIP - Search for taxonomy codes using the **Search** link.

5. Expand the **Taxonomy Terms** section on the left and locate the term.
6. Use the arrow buttons to move the taxonomy code from the left to the right side of the screen.

7. When finished, click **Close.**



8. Click **Save and Close**.

Other provider record details

Although many of the provider fields are not required, the more information that is included in the provider record, the more complete the information is for consumers who are making inquiries. Details in the provider record are searchable and can help staff locate information quickly when referring consumers for services.

This screenshot displays the information that I&R call representatives see when they search for services on behalf of a consumer.

1. Click **Administrator** in the **Navigation** bar. You may need to click the ellipsis to see this option.

2. Select **Organizations**.

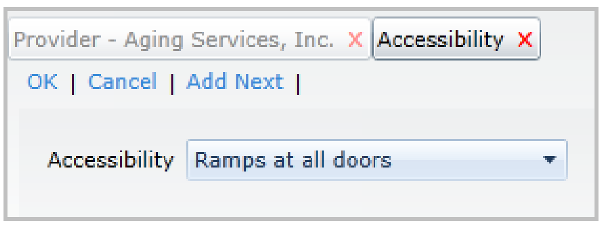
3. Click **Providers** and then open the provider record.

Accessibility

If a caller is a person with a disability, they may need to know if a provider is accessible. To identify this, follow the steps below:

1. With the provider record open, click the **Add New** menu, and then select **Accessibility.**

2. Select the type of **Accessibility** feature at the provider's location and then click **OK.** Click **Add Next** to add additional accessibility features.



Agency

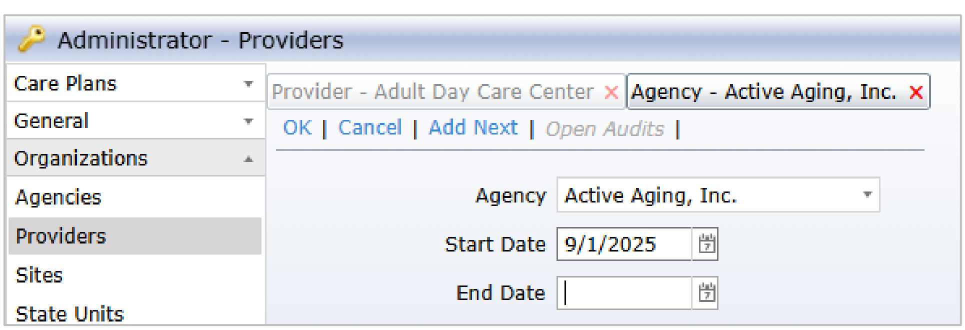
Providers are assigned to the agencies who oversee them.

1. With the provider record open, click the **Add New** menu, and then select **Agency.**

2. Select the agency.

3. Enter a **Start Date**. If the provider closes or ends its association with the agency, enter an **End Date**.

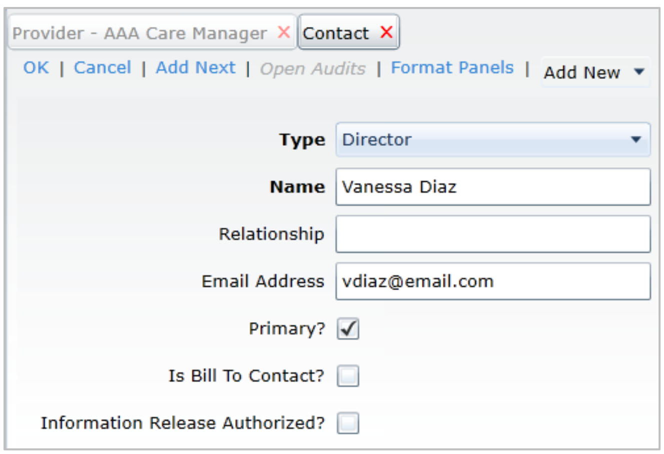
4. Click **OK**.



Contact

Follow the steps below to add contact names to the provider.

1. With the provider record open, click the **Add New** menu, and then select **Contact.**
2. Select the **Type.**
3. Type the contact **Name.**
4. If this is the main contact for the provider, select the **Primary?** check box.
5. Complete the remaining fields, if necessary.
6. Click **OK.**

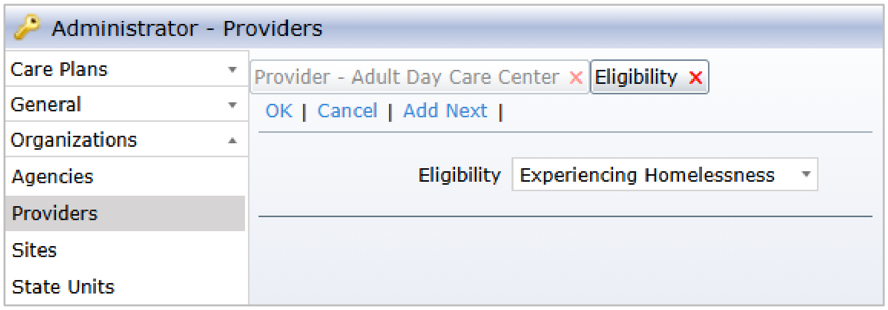


7. To add additional details about the contact, click **Add New** in the **Phones** or **Locations** panes.
8. To add freeform notes about the contact, type them in the **Notes** pane.

Eligibility

The Eligibility section in a provider record describes the criteria that must be met to receive services. More than one criterion can be selected.

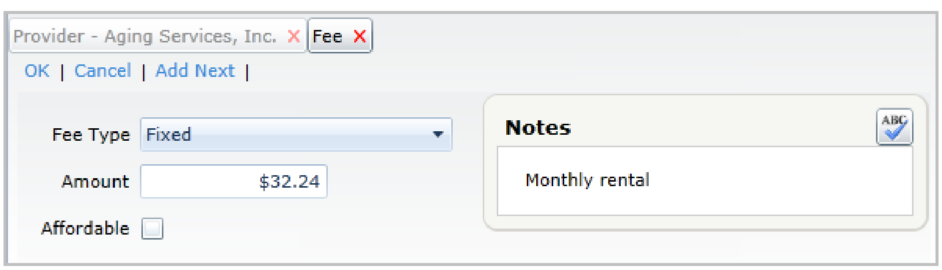
1. With the provider record open, click the **Add New** menu, and then select **Eligibility.**
2. Select the Eligibility.
3. Click **Add Next** to add additional eligibilities or **OK** to finish.



Fee

To add a fee for a service, follow the steps below:

1. With the provider record open, click the **Add New** menu, and then select **Fee.**
2. Select the **Fee Type.**
3. Type an **Amount.**
4. If the fee is affordable, select the **Affordable** option.
5. Add **Notes** about the service, if needed.
6. Click **OK.**

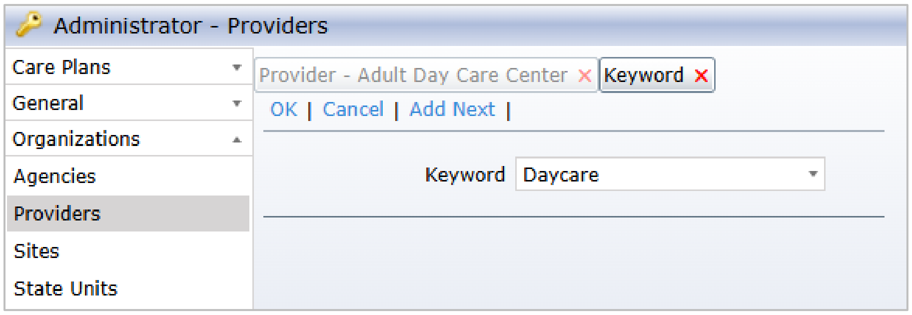


Keywords

Adding keywords makes searching for services more efficient.

1. With the provider record open, click the **Add New** menu, and then select **Keyword.**
2. Click the **Add New** menu and then select **Keyword.**
3. Select a keyword.
4. Click **OK.**

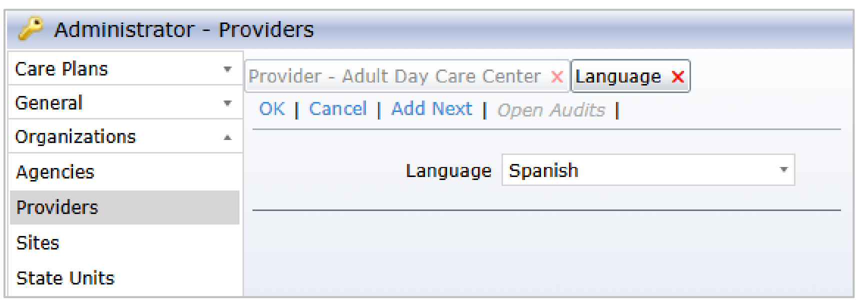
5. Click **Add Next** to add additional keywords or **OK** to finish.



Language

To identify the languages spoken at a provider:

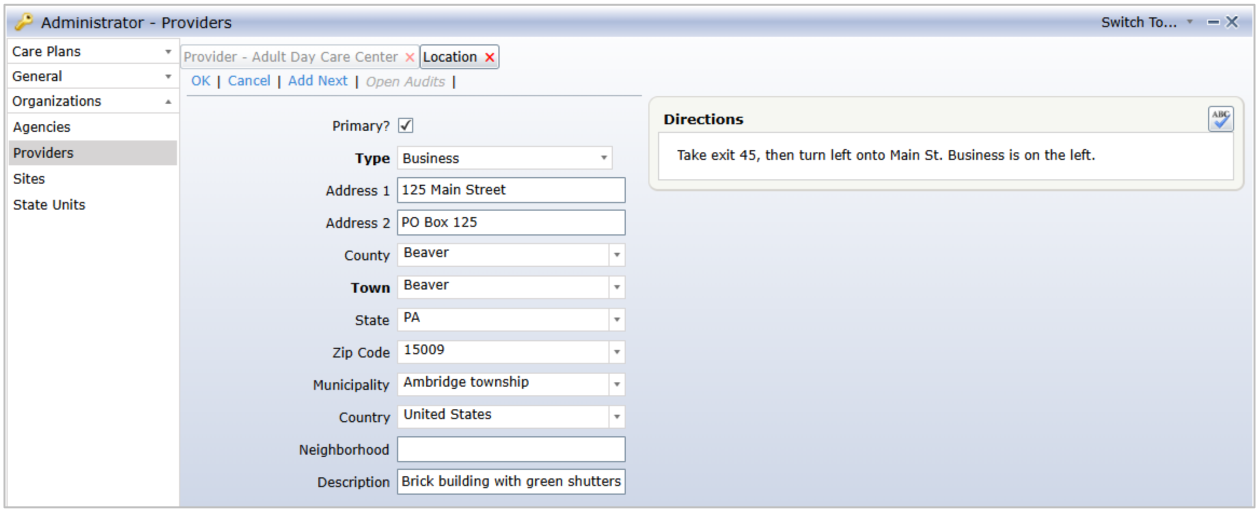
1. With the provider record open, click the **Add New** menu, and then select **Language.**
2. Select the **Language** and click **Add Next** to add additional languages or click **OK** to finish**.**



Location

The Location pane includes addresses for several location types.

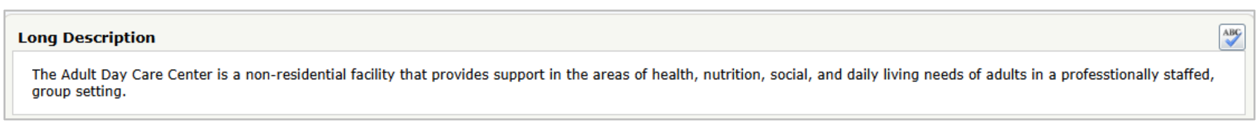
1. With the provider record open, click the **Add New** menu, and then select **Location.**
2. Select the location **Type** and **Town** (required fields).
3. Complete additional fields as needed.
4. To add directions, type text in the **Directions** box.
5. Click **Add Next** to add additional locations or click **OK** to finish.



Long Description

Long descriptions should give the user a good sense of the kind of provider.

1. With the provider record open, type text into the Long Description box. To check spelling, click **Spell Check**.
2. Click **Save** or **Save and Close**.



Notes

Freeform text can be added to the Notes field.

1. With the provider record open, type text into Notes box. To check spelling, click **Spell Check**.
2. Click **Save** or **Save and Close**.

Phone

Provider telephone numbers are an important part of I&R calls.

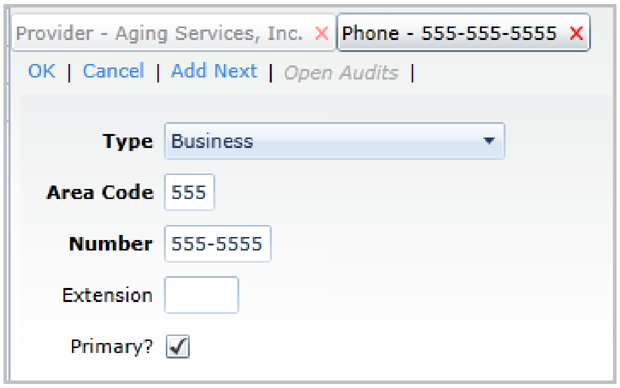
1. With the provider record open, click the **Add New** menu and then select **Phone**.

2. Select the **Type**.

3. Type the **Area Code** and **Number**.

4. If it is the provider's primary number, select the **Primary** option.

5. Click **Add Next** to add additional phone numbers or click **OK** to finish.



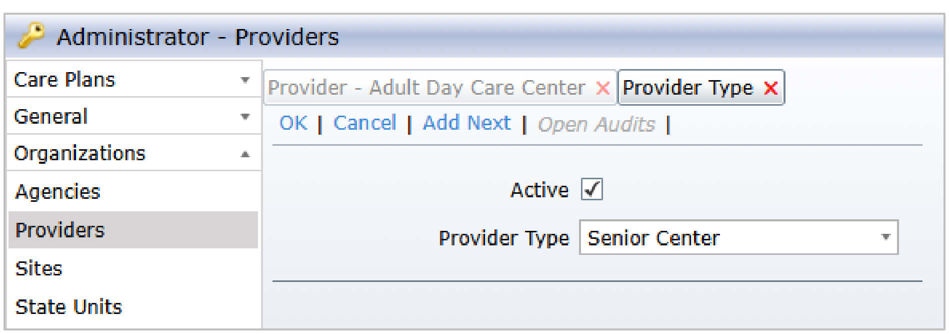
Provider Type

A provider can be described using more than one type. For example, a senior center that includes nursing and adult day care might include two provider types: Nursing Facility and Senior Center.

1. With the provider record open, click the **Add New** menu and then select **Provider Type**.

2. Select the **Provider Type**.

3. Click **Add Next** to add additional types or click **OK** to finish.

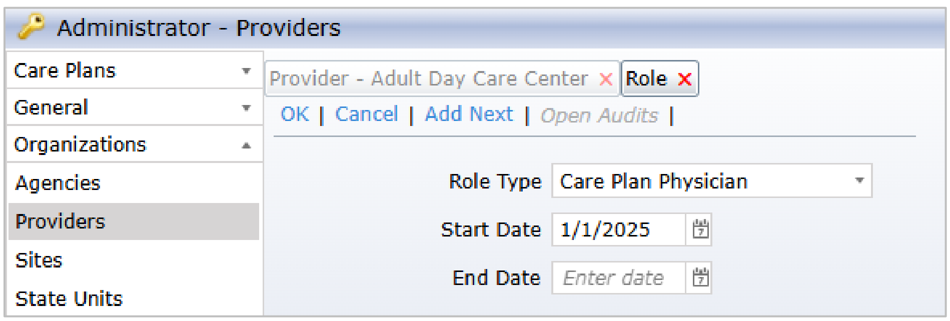


Role

Roles are another way to classify providers. Doctors, nurses, and service workers are all examples of provider roles.

NOTE – If the organization bills Medicaid, consumers must be associated with a care plan Care Manager that has the role type of Care Plan Physician.

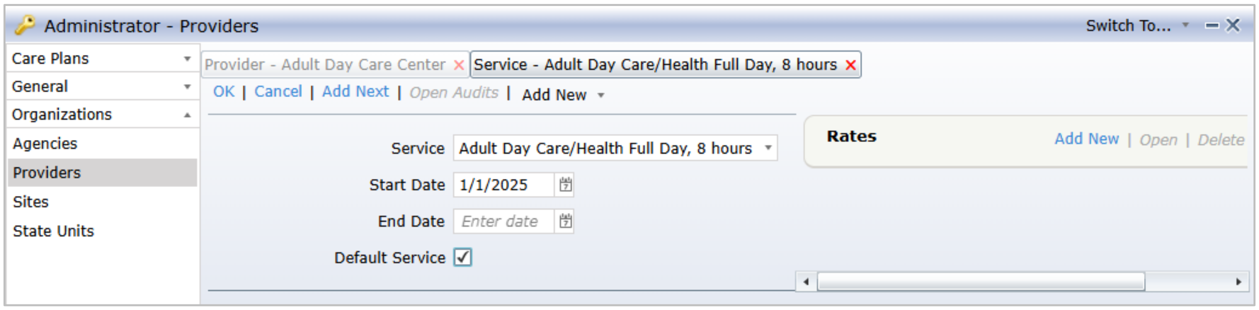
1. With the provider record open, click the **Add New** menu and then select **Role**.
2. Select the **Role Type**.
3. Enter a **Start Date**.



Service

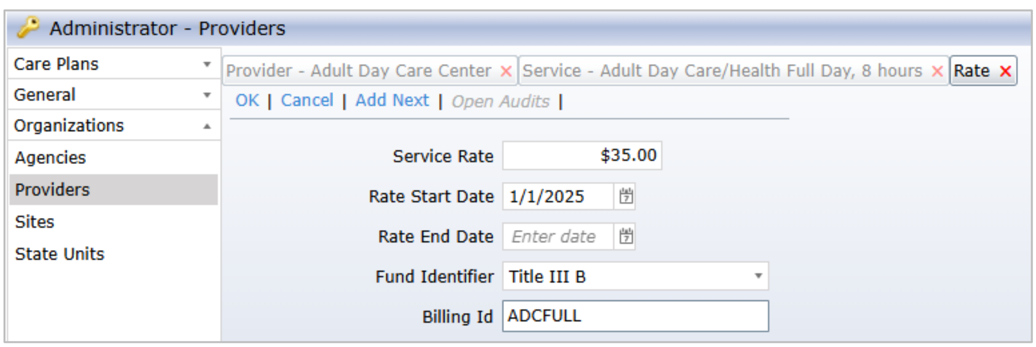
An accurate list of services that the provider offers is essential. Each service can have a separate rate, which is added to the service.

1. With the provider record open, click the **Add New** menu, and then select **Service.**
2. Select the service.
3. Enter a **Start Date** and select **Default Service** if this is the usual service the provider offers.



Add a service rate

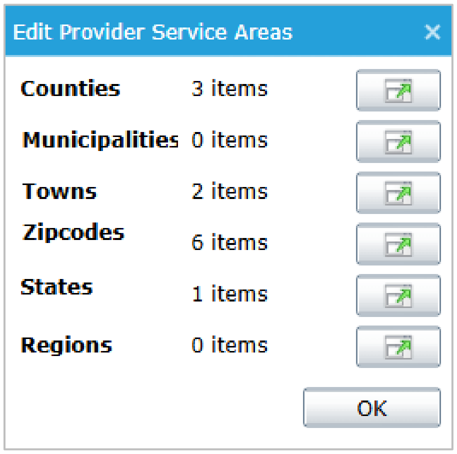
1. With the provider record open, open the **Service.**
2. In the **Rates** pane, click **Add New**.
3. Enter the **Service Rate**.
4. Edit the remaining fields, as needed.
5. Click **Add Next** to add another rate or click **OK** to finish.



Service area

Defining the areas in which the provider provides services is also an important piece of information that may be needed during a call.

1. With the provider record open, click the **Add New** menu, and then select **Service Areas.**
2. For each of the area types, click **Open** in the record row and select the location(s). When you are finished, click **OK**.

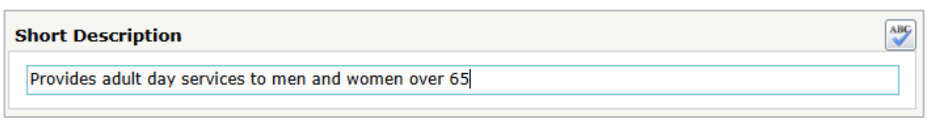


3. When you are finished making changes to the provider record, click **Save and Close**.

Short Description

Short descriptions (100 characters or less) appear in several fields throughout the solution.

1. With the provider record open, type a brief explanation of the provider in the Short Description field.

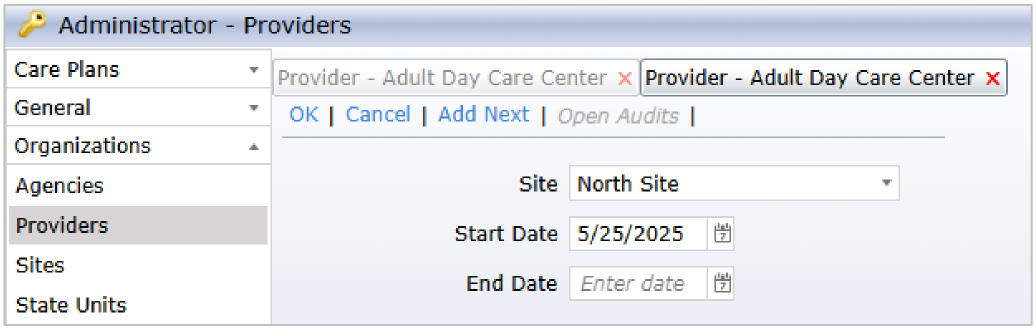


2. Click **Save** or **Save and Close**.

Site

A provider can offer services at more than one site.

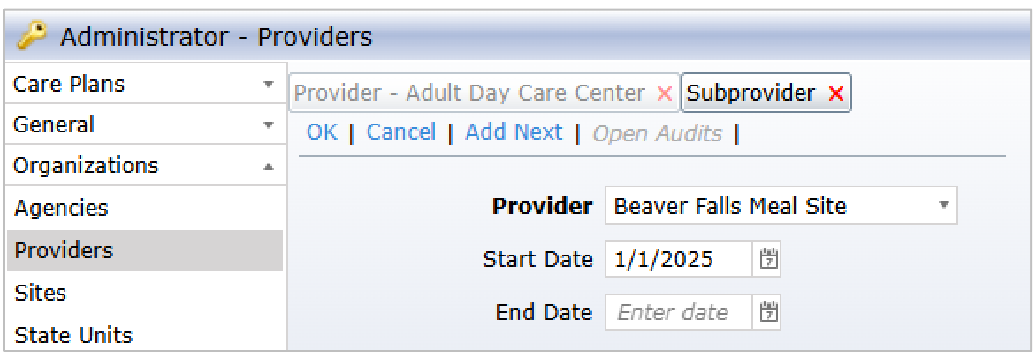
1. With the provider record open, click **Add New** and select **Site**.
2. Select the site and add a **Start Date** if known.
3. Click **Add Next** to add another rate or click **OK** to finish.



Subprovider

A provider can source services or items from subproviders.

1. With the provider record open, click **Add New** and select **Subprovider**.
2. Select the site and add a **Start Date** if known.
3. Click **Add Next** to add another rate or click **OK** to finish.

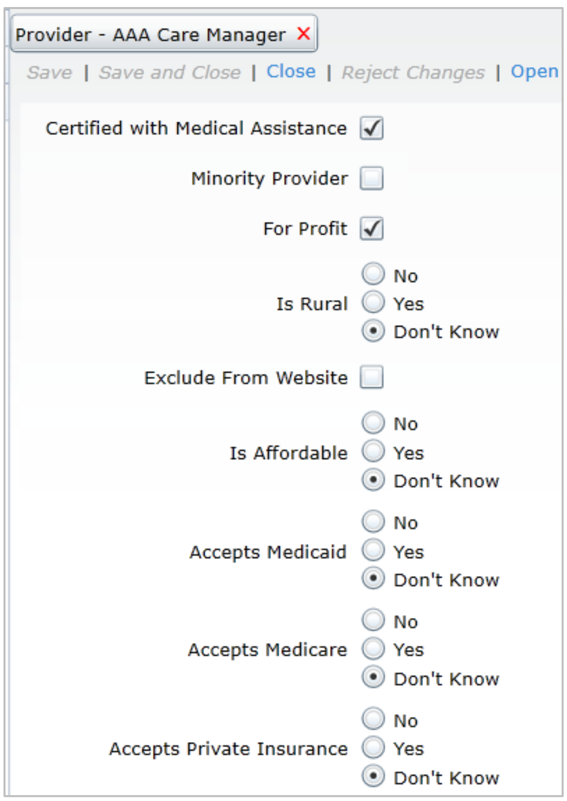


Provider details

There are several options in the provider record that relate to cost, insurance, and affordability. These options are located on the main page of the provider record.

- **Care Coordination Eligible**: Select this option if the provider has a WellSky Care Coordination license.
- **Certified with Medical Assistance**: Identifies if the provider offers certified medical assistance.
- **Minority Provider**: Select to identify that the provider identifies as a minority provider.
- **For Profit**: Select this check box to indicate that the provider is not a non-profit organization.

- **Is Rural**: Select Yes if the provider is a rural provider.
- **Exclude From Website**: This is a legacy setting and is not in use.
- **Is Affordable**: Select Yes if the provider is affordable.
- **Accepts Medicaid**: Select Yes if the provider accepts Medicaid, then enter the provider's Medicaid number in the field below.
- **Accepts Medicare**: Select Yes if the provider accepts Medicare, then enter the provider's Medicare number in the field below.
- **Accepts Private Insurance**: Select Yes if the provider accepts private insurance.
- **Default Billing ID**: If the provider uses one, enter the default billing ID number.

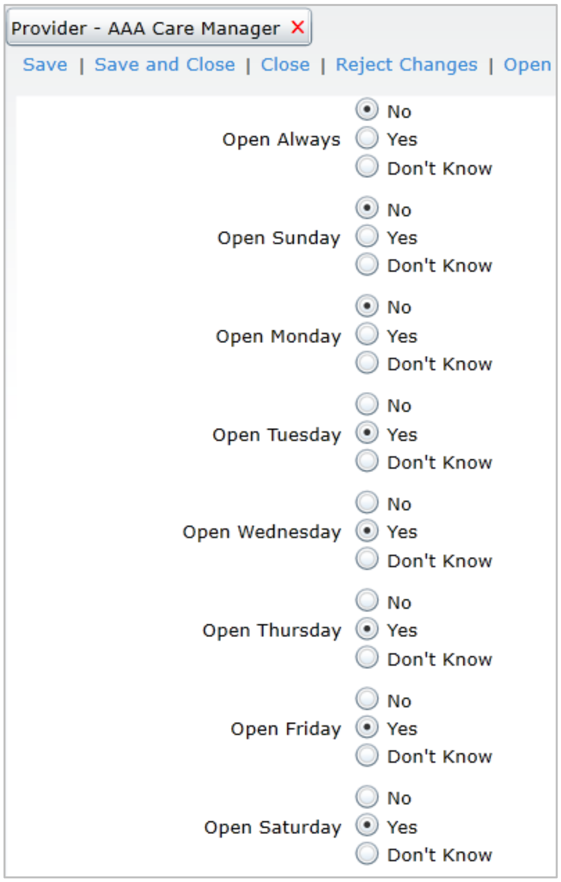


Open days

You can identify the days of the week that the provider is open.

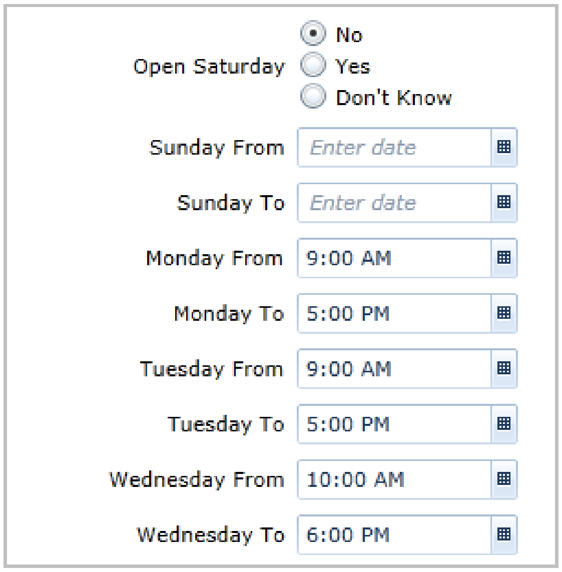
1. With the provider record open, scroll down to the provider **Details** page.

2. For each day of the week that the provider is open, click **Yes**.



Hours of operation

To define a provider's operating hours, type or select the **From** and **To** times for each day.



Appendix

New call toolbar

The Call toolbar is displayed when you add a new call record. This table describes the fields that are located on it.

Link	Description
Save	Updates the record without closing it.
Save and Close	Updates the record and closes it.
Close	Closes the record without making changes to the existing data.
Print	Creates a printout of the call.
Open Audits	Displays changes made to the call record. This may be dimmed and not available on your screen.
Format Panes	Customizes the call screen display.
Disable Timer	Cancels the call timer feature. When you click the link, the label changes to Enable Timer. To enable the feature, click Enable Timer.
Pause	Temporarily pauses the call timer.

Link	Description
Search for Services	Enables you to search for services during a call.
Add New	Click the down arrow to see options to add an activity, assessment, call topic, referral, or service delivery within the call record.

Call Details section fields

The table below describes the fields in the **Call Details** section.

Field	Description
Call Type	A call type refers to the type of contact being made: Incoming, Outgoing, Walk-in, Email, etc. Organizations can create their own Call Types.
Caller	The caller refers to the person on the other end of the phone with the worker. If it's an incoming call, a walk-in, or an email, it refers to the person who called, walked in, sent the email, etc. Organizations can create their own Caller Types. If it's an outgoing "call," it should refer to the person to whom the I&R staff worker is making the call. This is often incorrectly tracked as the IR worker being the caller for outgoing calls. The IR worker information entering the call session is already tracked behind the scenes. You need to add the person being talked to the caller field, and the consumer is still the person about whom they are speaking.
Caller Type	The Caller Type refers to the relationship between the caller and the consumer selected in the call session.
Consumer	The Consumer field always refers to the subject of the call or the person being talked ABOUT in the session. You can search for an existing consumer record by clicking the Open Dialog button.
Referred By	If the call results from a referral of another organization, the source can be recorded to document the history of the inquiry and to support reporting on incoming referrals.
Age Group	The age range of the person for whom the call is about.
Gender	Gender of the person for whom the call is about.
Gender Identity	Gender with which the caller associates. This field may or may not be displayed, depending on how your administrator has configured the solution.
Disabilities	The disabilities a consumer may have can be selected from the Open Dialog button. This information can be included in reports.
Call Priority	Calls can be classified by the urgency level of the request. This list is configurable by each organization.
Start Date/Time	This information is automatically populated; however, it can be overridden if needed.
End Date/Time	This information is automatically populated; however, it can be overridden if needed.

Field	Description
Seconds Paused	Total time the call was paused.
Complete	Select Complete when all available data has been recorded.
Primary Payment Source	Identifies the main method that will be used to pay for the services. This list is configurable by each organization.
Call Topic Count	Read-only field that displays the number of topics selected in the Topics section of the call record.
Referral Source	When a response is selected in the Referred By field, the Referral Source field is displayed if it's been configured by the administrator. Select the referral origin from the list.

I&R reports

The table below describes the I&R reports in the solution.

Report Title	Description
Agency Call Report	A summary of calls received, broken out by key metrics.
Call Follow-Up Report	A list of consumers that displays demographic information and the follow-up activities that have been created during call sessions.
Call Mailing Label Report	Avery 5160 mailing labels with the consumer/caller's home address.
Call Profiler Report	A summary of the total number of calls by a group that is selected by the user.
Call Referral Report	Information about referrals that have been made, grouped, and sorted by several options.
Call Summary Report	A detailed summary report for each call session based on the criteria selected.
Call Topic Report	A list of topics that were discussed during calls, grouped by several options.
I&R Provider Report	Summary of provider information, such as their business hours and the services they offer.
I&R Provider Directory Listing Report	A compressed summary of providers, including address, services provided, and hours of operation.
SART Report	Summary report of ADRC data that is used when preparing SART reports.

Version Control

Date	Changes
05/06/15	Initial Release
05/27/15	Client review and updates
06/03/15	Content updates
06/03/15	Minor edits and screenshot updates
4/15/16	Branding and content updates
9/4/18	Added content
9/18/18	Rebranded
06/24/20	Updated branding, edited for ADA compliance
10/12/20	Clarified field explanations on the Call Information screen
10/22/21	Updated to include Gender Identity field
7/11/23	Updated formatting
9/6/23	Updated OAAPS Caregiver Relationships table
12/8/23	Removed OAAPS Caregiver Relationship table, added configuration content.
9/25/25	Updated to Aging & Disability V8.0
11/10/25	Updated to Aging & Disability V8.1