



Aging & Disability Information & Referral User Guide

Version 8.1

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Contents

A&D I&R User Guide.....	1
I&R caller/consumer records	2
I&R call record	3
Add a call	4
Advanced Search	7
Search result columns	8
Add call details.....	9
Add panes.....	10
Add topics.....	11
Add ADRC Outcomes.....	13
Add services and referrals.....	14
Add assessments	17
Edit assessments.....	19
Call timer.....	20
Disable or pause the call timer.....	20
Complete a call record.....	20
Service delivery templates	21
Create a service delivery template.....	21
Create a template from a new service delivery.....	22
Create a template from an existing service delivery	23
Use service delivery templates	24
Call history	25
Display call history from a call	25
Display call history from the consumer record.....	27
Edit a consumer record	28
Call Details section	28
Add a caregiver	29
Aging & Disability I&R reports	34
Create a report definition.....	35

Select report filters.....	36
Administrative setup.....	39
Access roles & privileges	39
Edit privileges	39
System configuration.....	42
Add a Topic	43
Add a Topic Outcome	44
Add a Call Type	44
Add a Caller Type	45
Add a Call Priority.....	46
Add a Primary Payment Source	47
Add a Referred By entry	47
Add a Referral Source.....	48
Configure provider organizations	49
Services	49
Add a rate	50
Add a taxonomy code.....	51
Other provider record details	52
Accessibility	53
Agency	53
Contact	54
Eligibility.....	54
Fee.....	55
Keywords	55
Language	56
Location	56
Long Description	57
Notes.....	57
Phone.....	57
Provider Type	58
Role	59

Service	59
Service area	60
Short Description	61
Site	61
Subprovider	62
Provider details	62
Open days	63
Hours of operation	65
Appendix	65
New call toolbar	65
Call Details section fields	66
I&R reports	67

A&D I&R User Guide

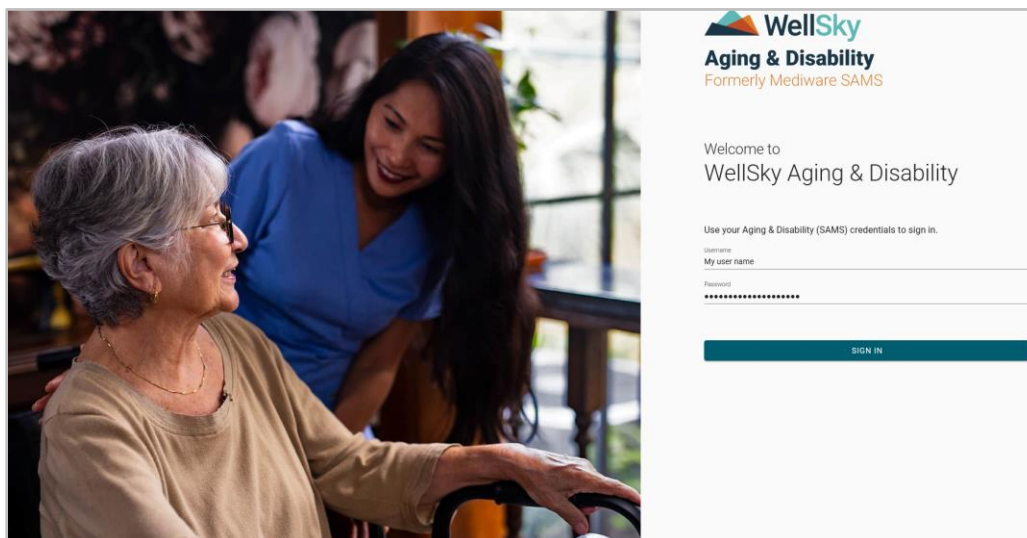
The Aging & Disability Information and Referral (I&R) module is a “one-stop-shop” for finding services for seniors, veterans, and adults with physical and intellectual disabilities. Call records include consumer data, a method to assess needs, and an easy way to provide information and make referrals.

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.

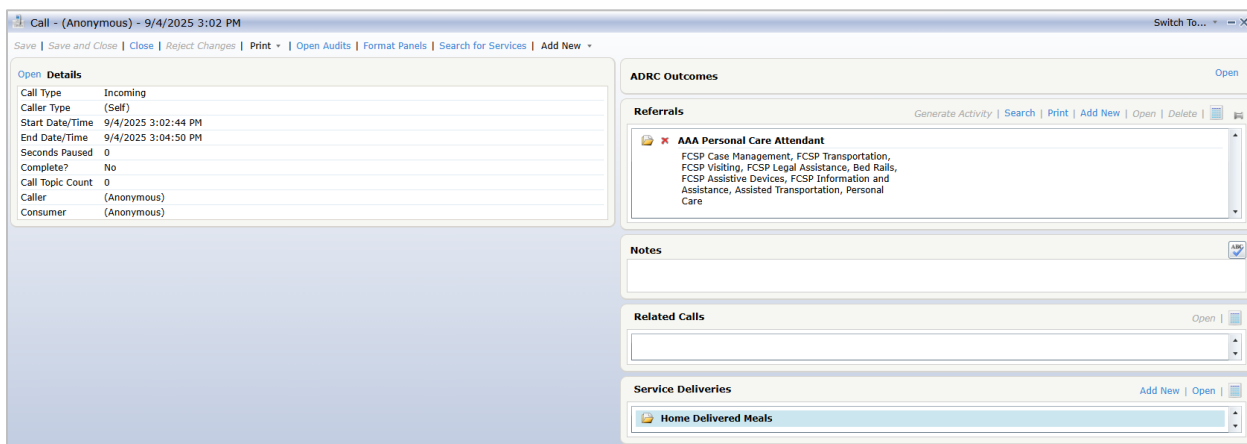
The table below describes the varying circumstances under which caller records and consumer records are created. It assumes that neither the caller nor the consumer has existing records.

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](#).



The screenshot displays the 'Call - (Anonymous) - 9/4/2025 3:02 PM' interface. It features a top toolbar with options like 'Save', 'Save and Close', 'Close', 'Reject Changes', 'Print', 'Open Audits', 'Format Panels', 'Search for Services', and 'Add New'. The main content area is divided into several sections:

- Open Details:** A table showing call information:

Call Type	Incoming
Caller Type	(Self)
Start Date/Time	9/4/2025 3:02:44 PM
End Date/Time	9/4/2025 3:04:50 PM
Seconds Paused	0
Complete?	No
Call Topic Count	0
Caller	(Anonymous)
Consumer	(Anonymous)
- ADRC Outcomes:** A section with an 'Open' button.
- Referrals:** A list of referrals, including 'AAA Personal Care Attendant' with a list of services: FCSP Case Management, FCSP Transportation, FCSP Visiting, FCSP Legal Assistance, Bed Rails, FCSP Assistive Devices, FCSP Information and Assistance, Assisted Transportation, Personal Care.
- Notes:** A section with an 'Add' button.
- Related Calls:** A section with an 'Open' button.
- Service Deliveries:** A section with an 'Add New' button and a list of services, including 'Home Delivered Meals'.

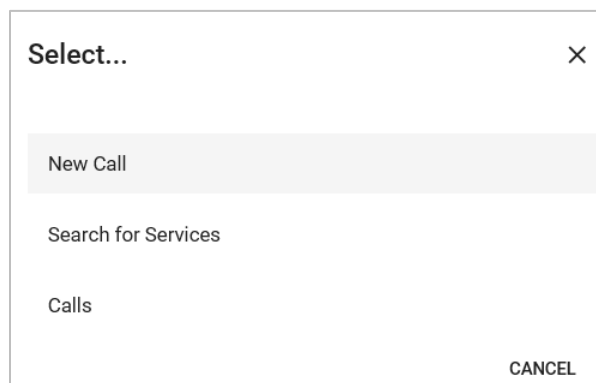
Add a call

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](#).

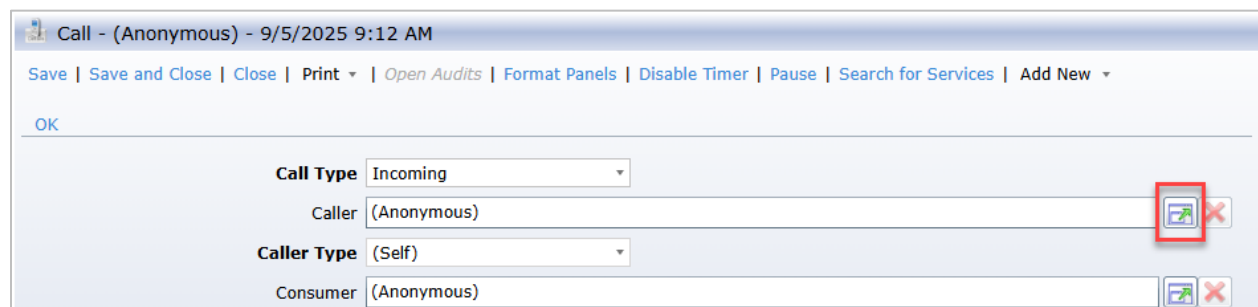
1. Log into Aging & Disability.
2. Click **Calls** in the **Navigation** bar.



3. Click **New Call**.



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



Call - (Anonymous) - 9/5/2025 9:12 AM

Save | Save and Close | Close | Print ▾ | Open Audits | Format Panels | Disable Timer | Pause | Search for Services | Add New ▾

OK

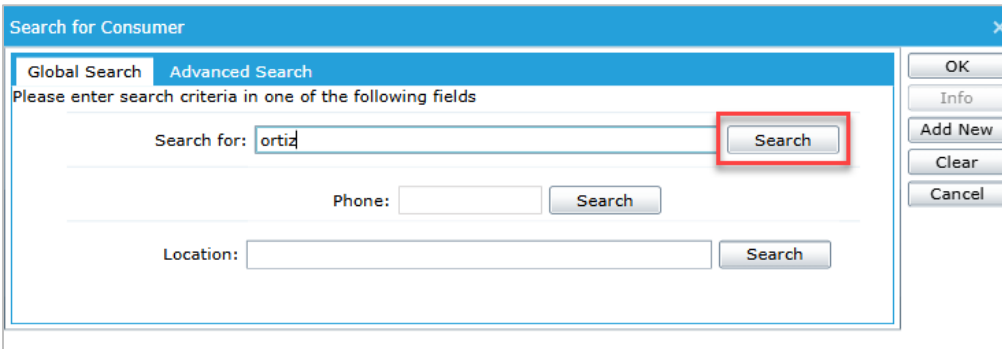
Call Type Incoming ▾

Caller (Anonymous) 

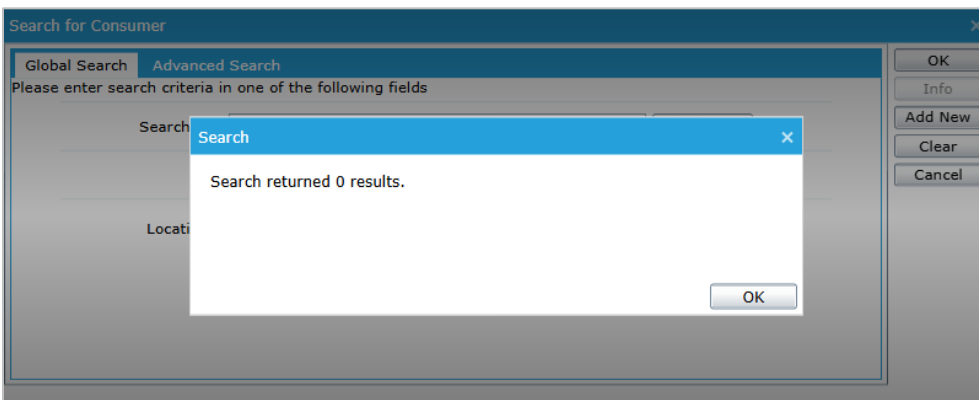
Caller Type (Self) ▾

Consumer (Anonymous) 

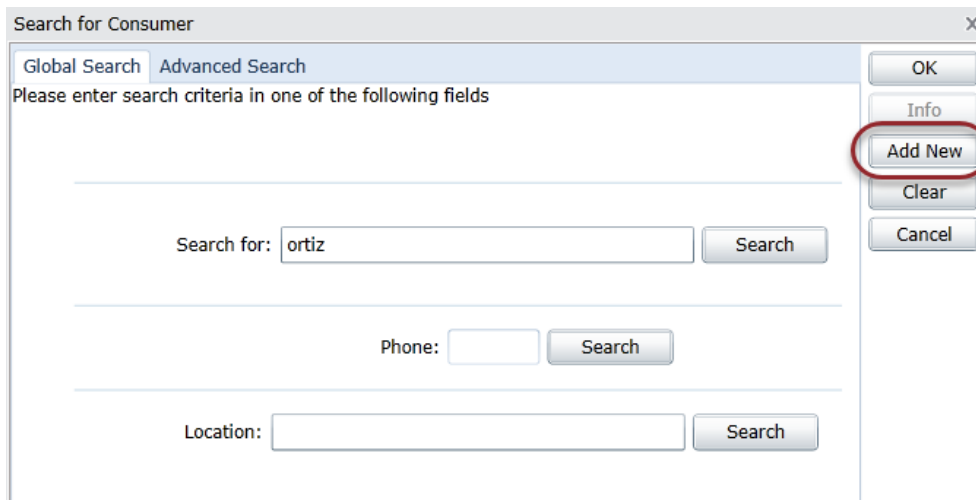
5. From the **Global Search** tab, type the name of the caller in the **Search for** field, then click **Search**.



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

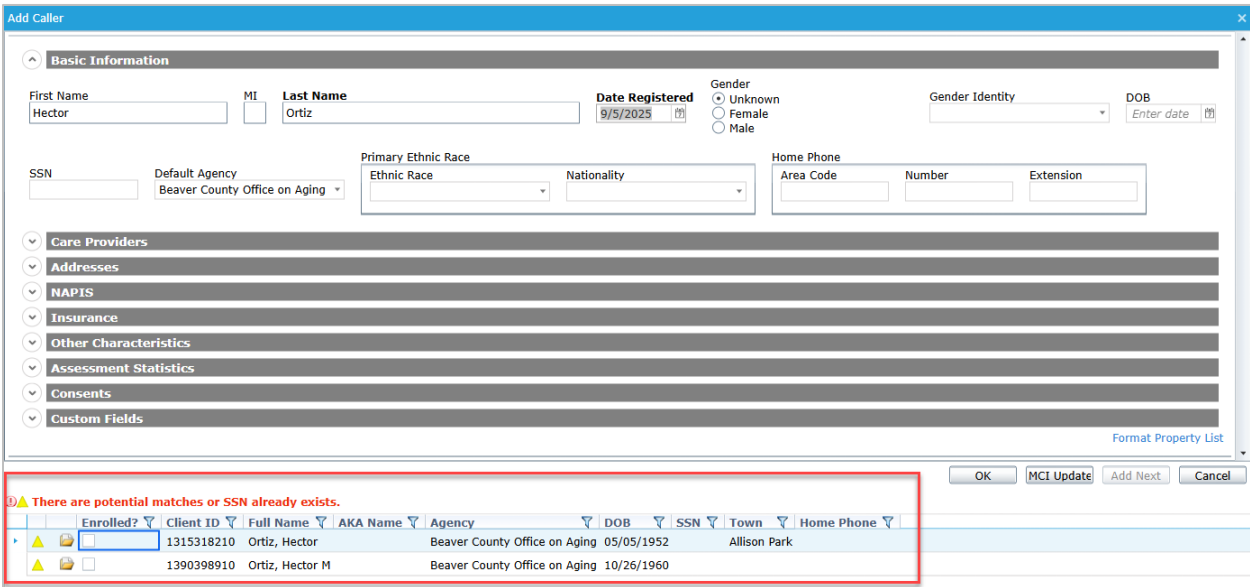


6. In the search results screen, click **Add New**.



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

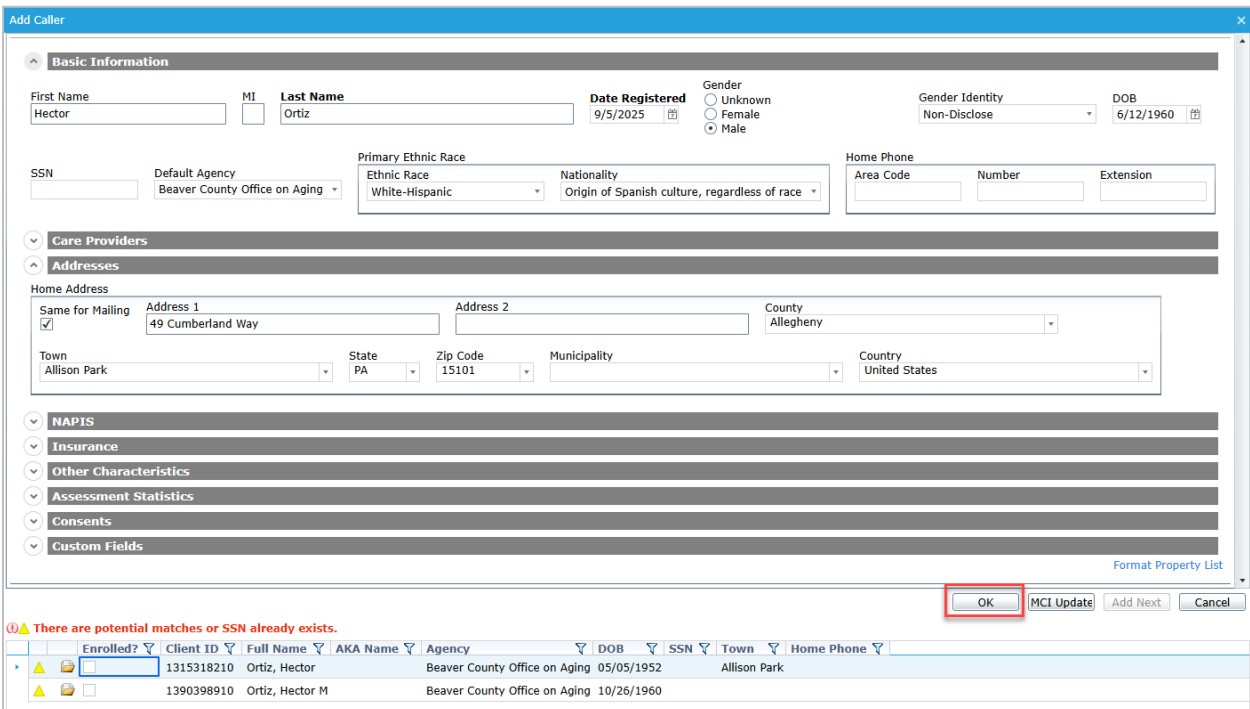
- a. As you type, possible matching records are displayed. If one of the records is a match, click it and edit the record, rather than creating a new one.



The screenshot shows the 'Add Caller' form with the 'Basic Information' tab selected. The form contains fields for First Name, MI, Last Name, Date Registered, Gender, Gender Identity, DOB, SSN, Default Agency, Primary Ethnic Race, Nationality, Home Phone (Area Code, Number, Extension), and several expandable sections: Care Providers, Addresses, NAPIS, Insurance, Other Characteristics, Assessment Statistics, Consents, and Custom Fields. A warning message at the bottom states: '⚠️ There are potential matches or SSN already exists.' Below this message is a table of potential matches:

Enrolled?	Client ID	Full Name	AKA Name	Agency	DOB	SSN	Town	Home Phone
☒	1315318210	Ortiz, Hector		Beaver County Office on Aging	05/05/1952		Allison Park	
☐	1390398910	Ortiz, Hector M		Beaver County Office on Aging	10/26/1960			

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



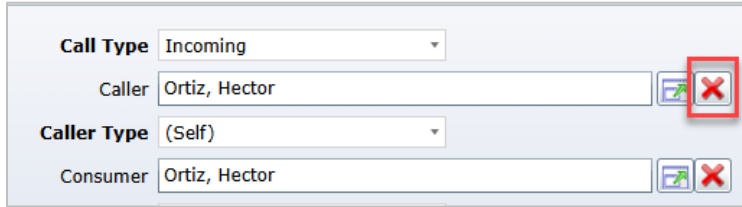
The screenshot shows the 'Add Caller' form with the 'Addresses' tab selected. The form contains fields for First Name, MI, Last Name, Date Registered, Gender, Gender Identity, DOB, SSN, Default Agency, Primary Ethnic Race, Nationality, Home Phone (Area Code, Number, Extension), and several expandable sections: Care Providers, Addresses, NAPIS, Insurance, Other Characteristics, Assessment Statistics, Consents, and Custom Fields. The 'Addresses' section is expanded, showing fields for Same for Mailing, Address 1, Address 2, County, Town, State, Zip Code, Municipality, and Country. A warning message at the bottom states: '⚠️ There are potential matches or SSN already exists.' Below this message is a table of potential matches:

Enrolled?	Client ID	Full Name	AKA Name	Agency	DOB	SSN	Town	Home Phone
☒	1315318210	Ortiz, Hector		Beaver County Office on Aging	05/05/1952		Allison Park	
☐	1390398910	Ortiz, Hector M		Beaver County Office on Aging	10/26/1960			

The 'OK' button is highlighted with a red box.

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

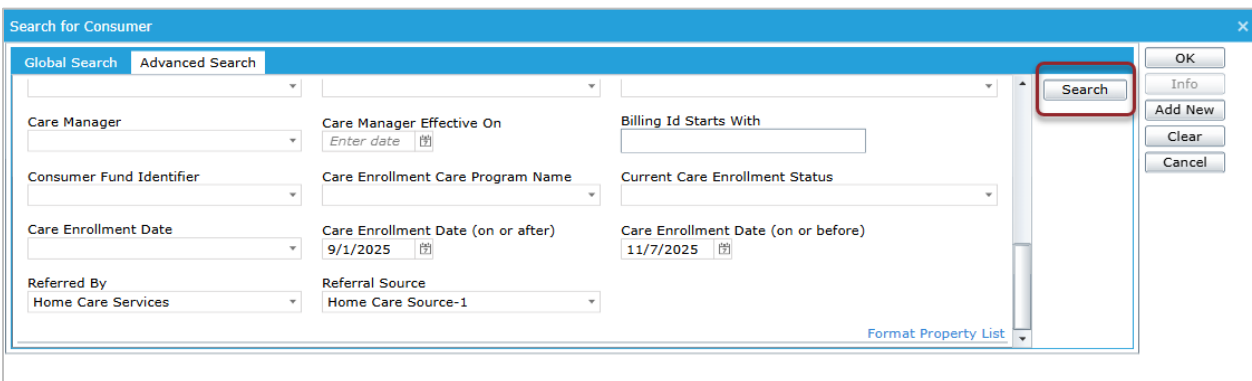
NOTE - To change the caller, click **Clear Contents**, to the right of the Caller or Consumer field. The Caller or Consumer types revert to Anonymous.



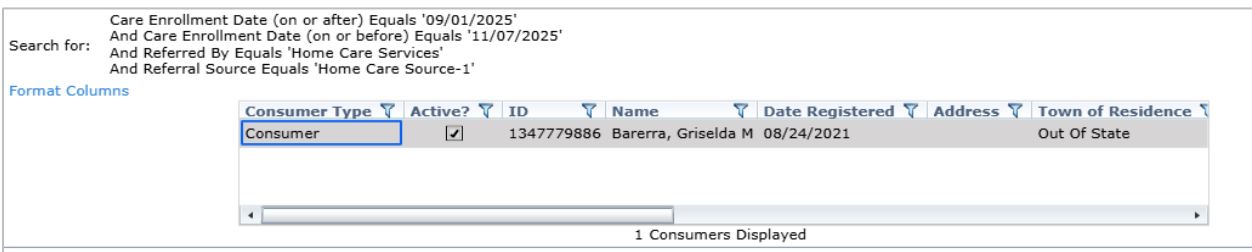
Advanced Search

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.



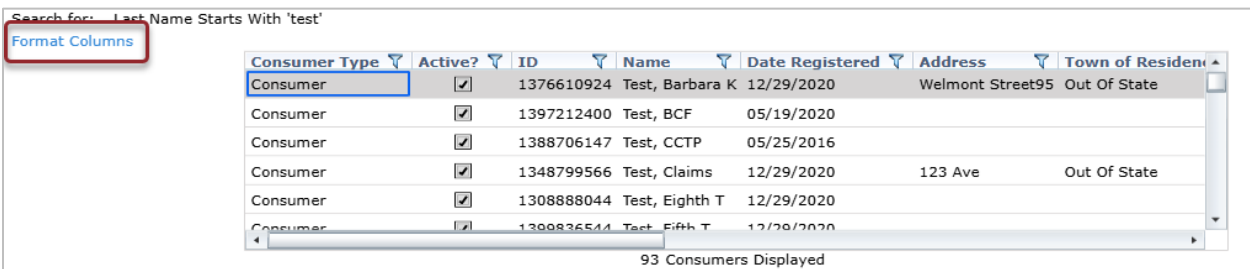
Consumer Type	Active?	ID	Name	Date Registered	Address	Town of Residence
Consumer	☒	1347779886	Barerra, Griselda M	08/24/2021	Out Of State	Out Of State

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**.

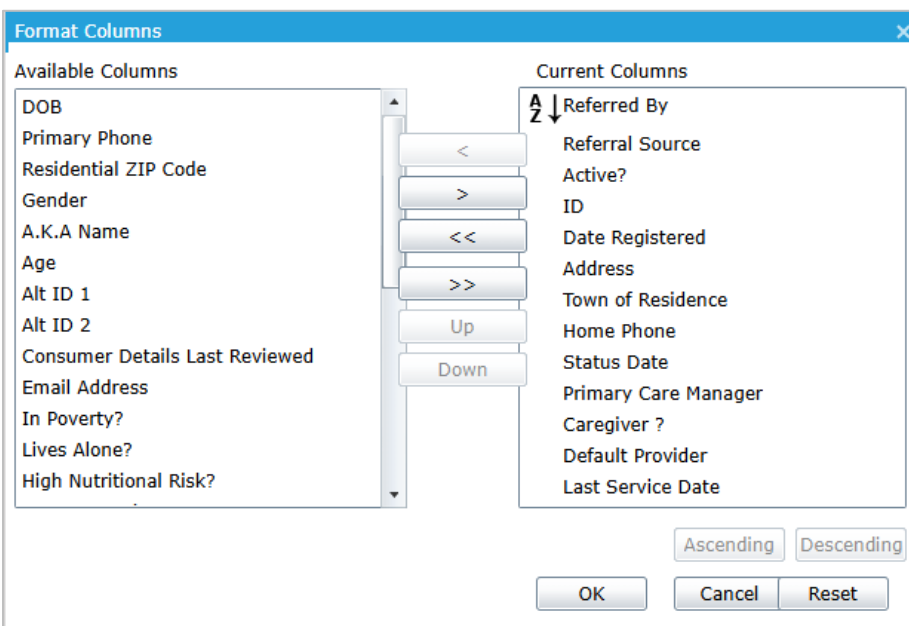


The screenshot shows a search results interface. At the top, a search bar contains the text "Last Name Starts With 'test'". Below the search bar, a button labeled "Format Columns" is highlighted with a red box. The main area is a table with the following columns: Consumer Type, Active?, ID, Name, Date Registered, Address, and Town of Residence. The table contains several rows of consumer data. At the bottom of the table, it says "93 Consumers Displayed".

Consumer Type	Active?	ID	Name	Date Registered	Address	Town of Residence
Consumer	☒	1376610924	Test, Barbara K	12/29/2020	Wilmington Street95	Out Of State
Consumer	☒	1397212400	Test, BCF	05/19/2020		
Consumer	☒	1388706147	Test, CCTP	05/25/2016		
Consumer	☒	1348799566	Test, Claims	12/29/2020	123 Ave	Out Of State
Consumer	☒	1308888044	Test, Eighth T	12/29/2020		
Consumer	☒	1308836544	Test, Fifth T	12/29/2020		

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.

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

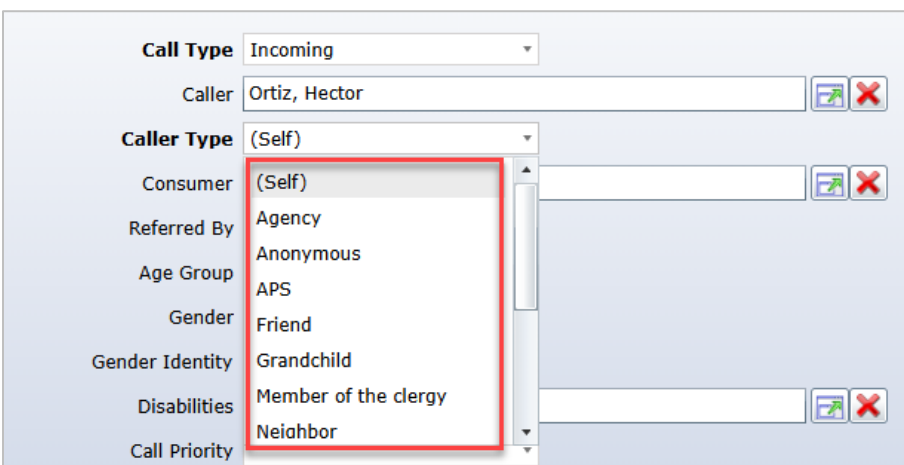


The **Format Columns** dialog box is shown. It has two main sections: **Available Columns** on the left and **Current Columns** on the right. The **Available Columns** list includes: DOB, Primary Phone, Residential ZIP Code, Gender, A.K.A Name, Age, Alt ID 1, Alt ID 2, Consumer Details Last Reviewed, Email Address, In Poverty?, Lives Alone?, and High Nutritional Risk?. The **Current Columns** list includes: Referred By, Referral Source, Active?, ID, Date Registered, Address, Town of Residence, Home Phone, Status Date, Primary Care Manager, Caregiver ?, Default Provider, and Last Service Date. Between the two lists are buttons: <, >, <<, >>, Up, and Down. At the bottom right are buttons for **Ascending**, **Descending**, **OK**, **Cancel**, and **Reset**.

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](#).

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

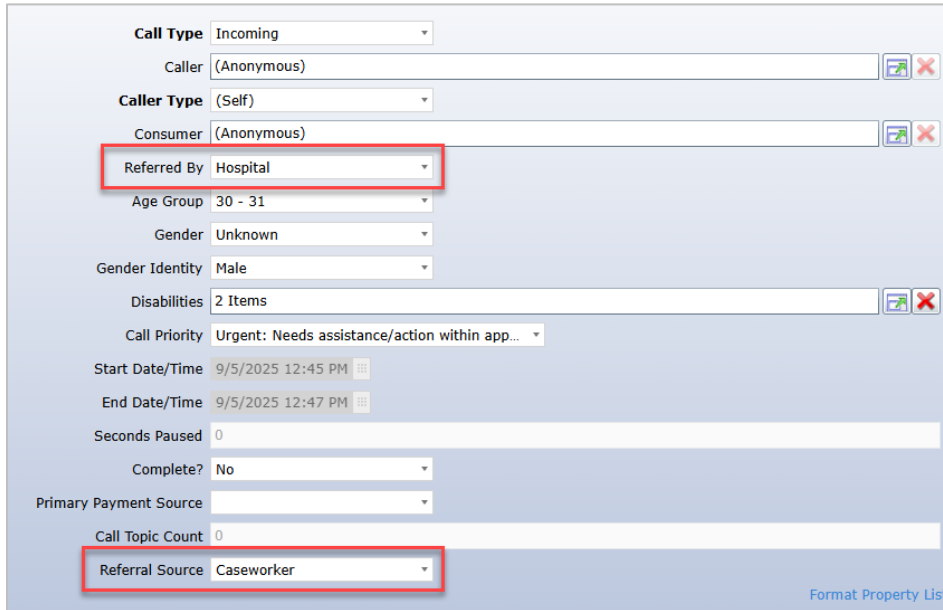


The **Call details** form is shown. The **Call Type** dropdown is set to **Incoming**. The **Caller** field contains **Ortiz, Hector**. The **Caller Type** dropdown is open, showing a list of options: (Self), Agency, Anonymous, APS, Friend, Grandchild, Member of the clergy, and Neighbor. The **Consumer** field is set to (Self). The **Referred By** field is empty. The **Age Group** field is empty. The **Gender** field is empty. The **Gender Identity** field is empty. The **Disabilities** field is empty. The **Call Priority** field is empty.

- 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.



The screenshot displays a form with various fields for call recording. The 'Referred By' field is set to 'Hospital' and the 'Referral Source' field is set to 'Caseworker'. Both fields are highlighted with red rectangular boxes. Other visible fields include 'Call Type' (Incoming), 'Caller' (Anonymous), 'Caller Type' (Self), 'Consumer' (Anonymous), 'Age Group' (30 - 31), 'Gender' (Unknown), 'Gender Identity' (Male), 'Disabilities' (2 Items), 'Call Priority' (Urgent: Needs assistance/action within app...), 'Start Date/Time' (9/5/2025 12:45 PM), 'End Date/Time' (9/5/2025 12:47 PM), 'Seconds Paused' (0), 'Complete?' (No), 'Primary Payment Source', and 'Call Topic Count' (0). A 'Format Property List' link is visible at the bottom right of the form.

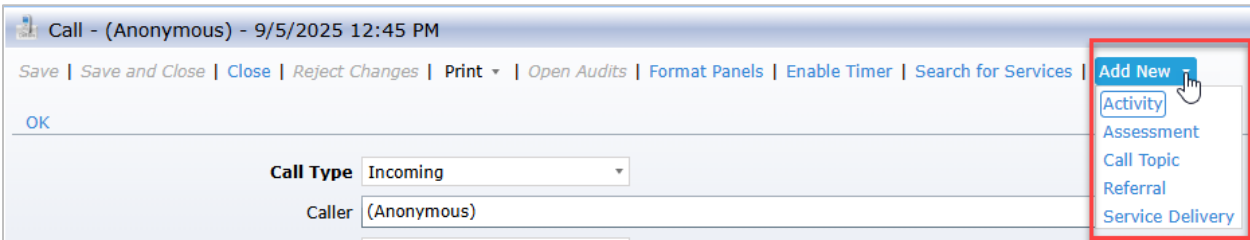
4. Complete the remaining fields, as needed. Check with your Aging & Disability administrator for your organization's data entry requirements.
5. In the **Complete** field, select **Yes** if the call has been completed.
6. Click **Save and Close**.

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.

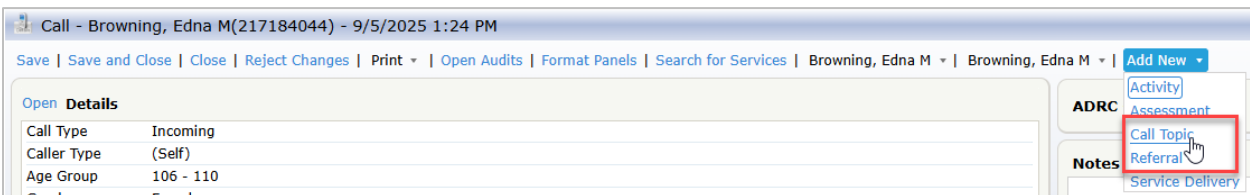


Add topics

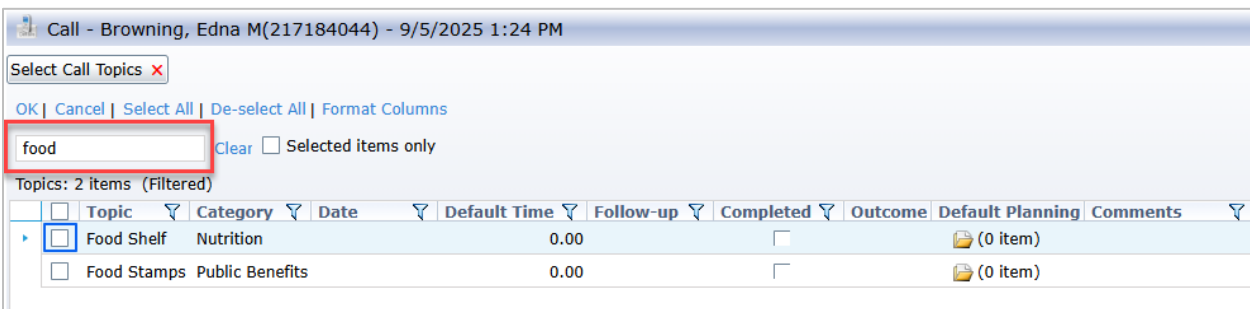
Topics are items that are discussed in the call. One or many topics can be discussed and it's important to identify each item and the time spent on it.

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.

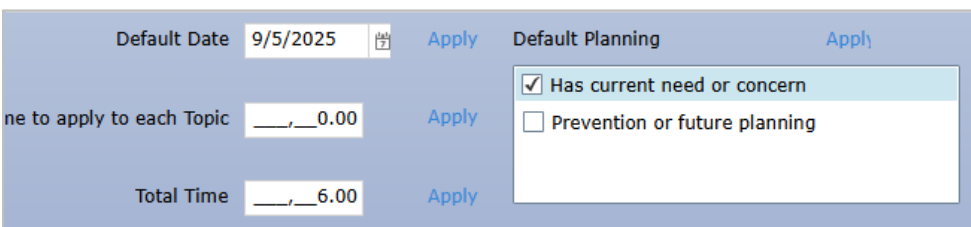


3. Select the topic(s).

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.

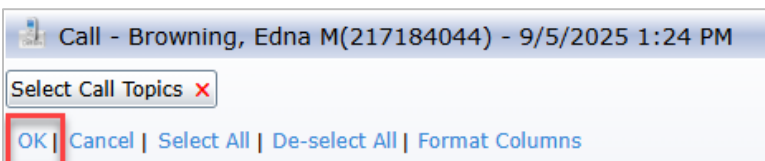
6. In the Default Planning field, select an option, if needed, then click **Apply** above the box.



The screenshot shows a form with the following fields and options:

- Default Date:** 9/5/2025 (with a calendar icon) and an **Apply** link.
- Time to apply to each Topic:** __, __0.00 and an **Apply** link.
- Total Time:** __, __6.00 and an **Apply** link.
- Default Planning:** A dropdown menu with two options: ☒ **Has current need or concern** and ☐ **Prevention or future planning**. An **Apply** link is located above the dropdown.

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



The screenshot shows a dialog box titled "Call - Browning, Edna M(217184044) - 9/5/2025 1:24 PM". It has a "Select Call Topics" header with a red 'X' icon. At the bottom, there are four buttons: **OK** (highlighted with a red box), **Cancel**, **Select All**, and **De-select All**. There is also a **Format Columns** link.

- The **Topics** pane is updated.

ADRC Outcomes
Open

Topics
Select Topics | Delete Topics |

Food Shelf(Nutrition)
Time Spent:3
Date:09/05/2025
Completed:Yes
Follow-up:
Comments:

Food Stamps(Public Benefits)
Time Spent:3
Date:09/05/2025
Completed:Yes
Follow-up:
Comments:

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.

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

ADRC Outcomes
OK

10 items
☐ Selected Items Only

☐ Adult Protective Services
☐ Emergency Services
☐ Follow-Up Contact from RC - but not referred for s
☒ Other Services/Resources/Information
☐ Public Funding: Medicare, medicaid, foodstamps, s

☒ Brief or short-term services, follow-along, or servi
☐ Family Care Function Screen
☐ Long Term Care Services/Resources/Information
☐ Private Long Term Care Services
☐ Services/Resources Other Than Emergency, APS, c

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

ADRC Outcomes
Open

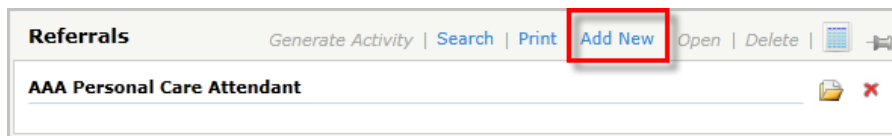
Brief or short-term services, follow-along, or service c Other Services/Resources/Information

Add services and referrals

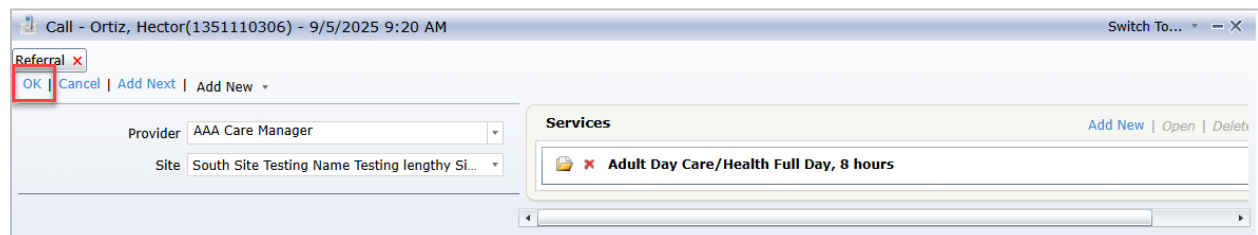
During a call, callers may request information about providers. These are tracked as referrals. You can quickly add a referral if the provider is known, or you can search for a provider(s) based on the caller's need. In addition, the referral source can be identified.

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.

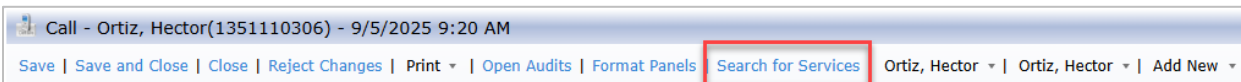


Search for services

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**.

Call - Ortiz, Hector(1351110306) - 9/5/2025 9:20 AM

Search for Services ✕

transportation

☒ Limit search to one agency Aging Services, Inc. ☐ Limit search to consumer's ZIP Residence (15101)

[Advanced](#) [Print](#)

AAA Personal Care Attendant Service Provider

[Add](#) | [Show More](#)

Short Description: Genral Testing of Short Description

Notes: What has been tested:
1) Left navigation menu.
2) Top navigation menu.
3) EULA for new consumer.
3) Created New consumer from SAMS CGD Access Panel.
4) Created data like assessment, care plan and goals etc and same is been reflected in CGD Site.

QA's concern: Created a consumer from CGD Access Panel -> Sent credentials -> now logged in to CGD site with system generated password : Obs

Services: Adult Day Care/Health Full Day, 8 hours, Adult Day Care/Health Hourly, Assisted **Transportation**, Bathroom Modification, Bed Rails, Caregiver Out

Phones: Home (210) 120-1012 x 34344 Business (452) 200-0045 x 45245

Matched On: Services x3

Aging Services, Inc. Agency Provider Service Provider

[Add](#) | [Show More](#)

Long Description: 123456

Notes: test

Services: Adult Day Care/Health Full Day, Assistance - Patient / provider interactions, Assisted **Transportation**, Case Management, Chore, Counseling / Self-

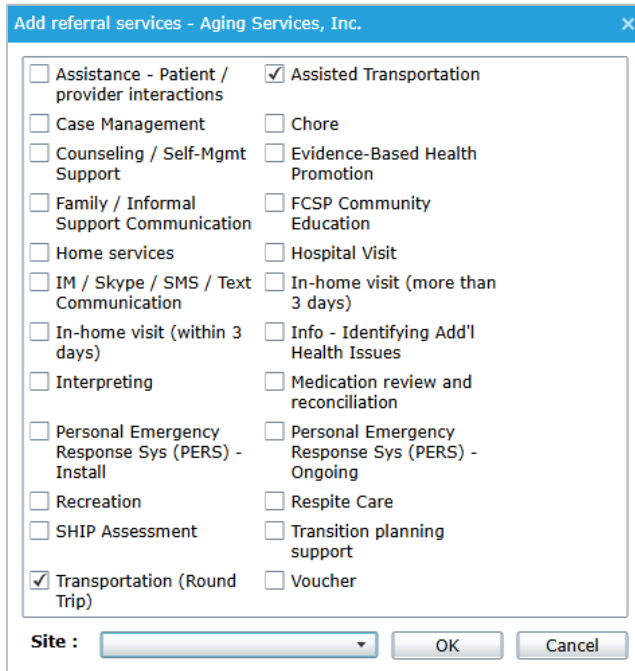
Locations: Business 1005 Oak Street Mailing P.O. Box 519
Indiana, PA 15701 Indiana, PA 15701

Phones: Business (800) 355-5577

Matched On: Services x2

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.

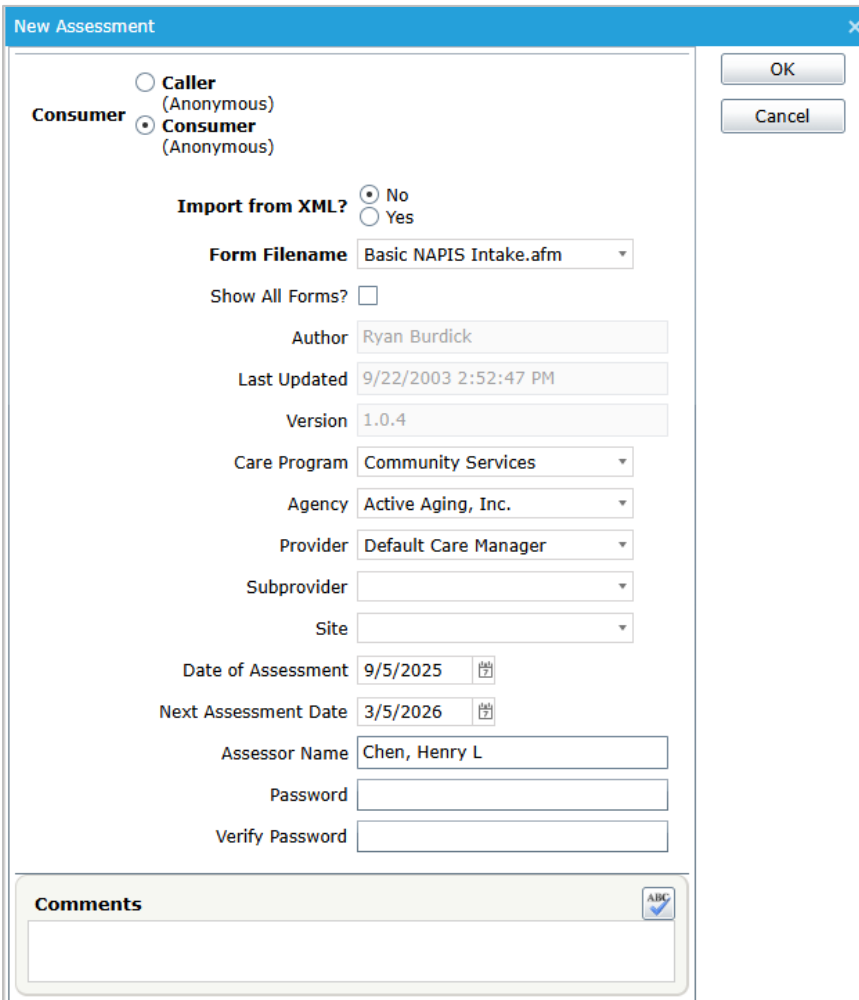


Add assessments

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**.



The "New Assessment" dialog box contains the following fields and controls:

- Caller (Anonymous)**: Radio button, currently unselected.
- Consumer (Anonymous)**: Radio button, currently selected.
- Import from XML?**: Radio buttons for "No" (selected) and "Yes".
- Form Filename**: Dropdown menu showing "Basic NAPIS Intake.afm".
- Show All Forms?**: Checkbox, currently unchecked.
- Author**: Text field with "Ryan Burdick".
- Last Updated**: Text field with "9/22/2003 2:52:47 PM".
- Version**: Text field with "1.0.4".
- Care Program**: Dropdown menu showing "Community Services".
- Agency**: Dropdown menu showing "Active Aging, Inc.".
- Provider**: Dropdown menu showing "Default Care Manager".
- Subprovider**: Dropdown menu (empty).
- Site**: Dropdown menu (empty).
- Date of Assessment**: Date field with "9/5/2025" and a calendar icon.
- Next Assessment Date**: Date field with "3/5/2026" and a calendar icon.
- Assessor Name**: Text field with "Chen, Henry L".
- Password**: Text field (empty).
- Verify Password**: Text field (empty).
- Comments**: Text area with a "ABC" icon.
- Buttons**: "OK" and "Cancel" buttons on the right side.

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.

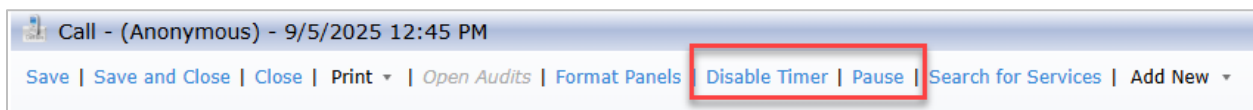
NOTE - The Aging & Disability I&R Module can be configured in many ways. Check with your Aging & Disability administrator for more information on how your organization's solution is configured.

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

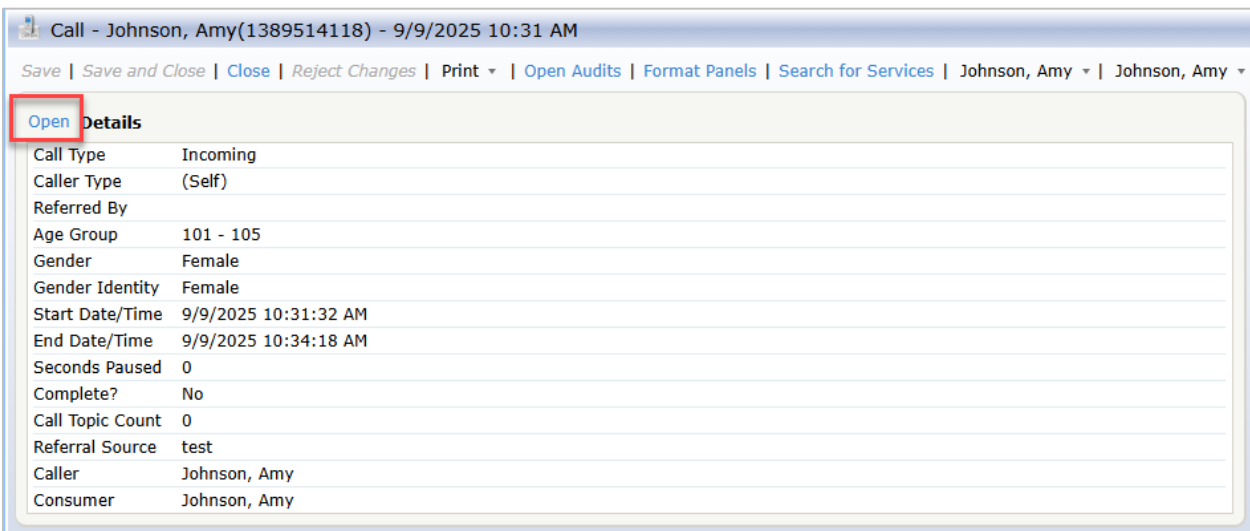
1. To disable the call timer and stop tracking time, click **Disable Timer** on the **Call** toolbar.
2. To temporarily stop the timer, click **Pause** on the **Call** toolbar. To start the timer again, click **Resume**.



Complete a call record

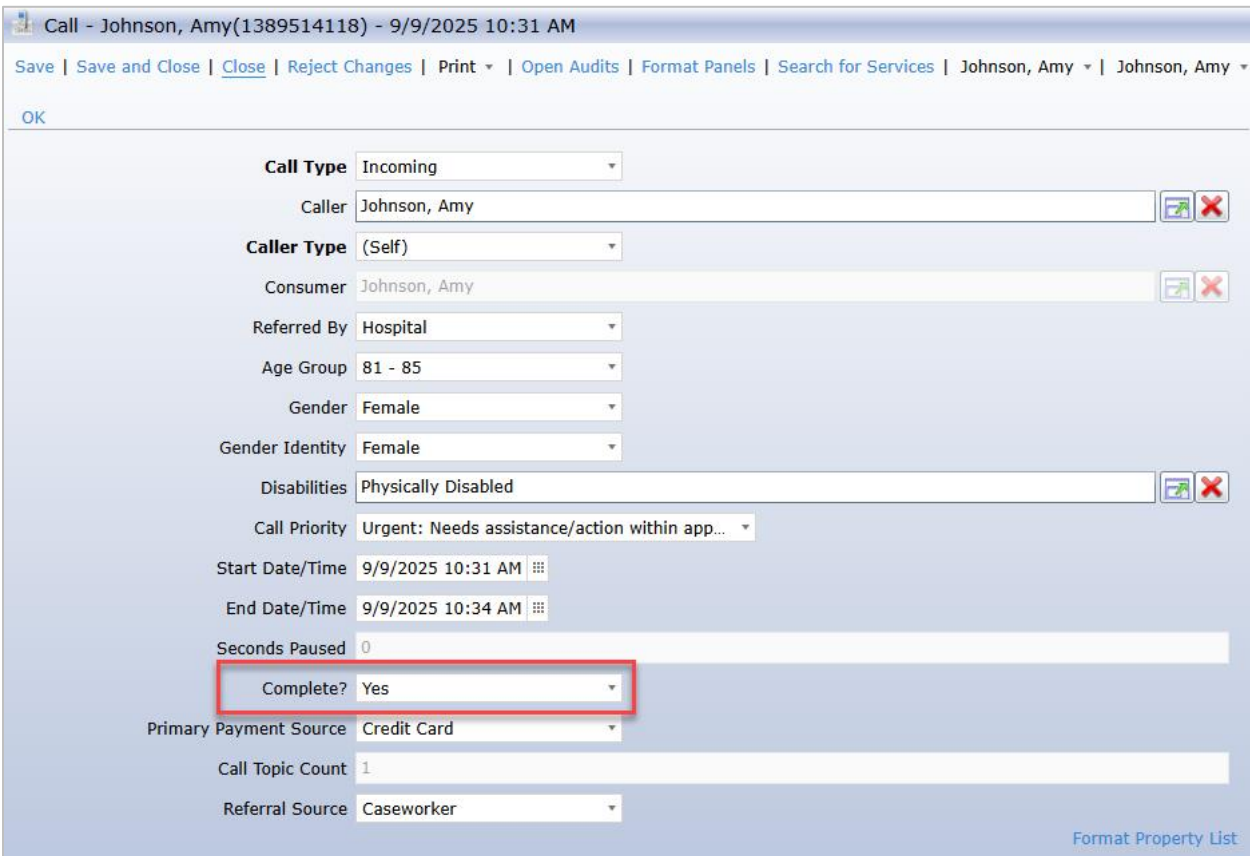
When a call is finished, the call record is identified as complete. By completing the call, the End Date/Time is automatically added to the Call Details, and the timer stops.

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**.



Call - Johnson, Amy(1389514118) - 9/9/2025 10:31 AM

Save | Save and Close | Close | Reject Changes | Print | Open Audits | Format Panels | Search for Services | Johnson, Amy | Johnson, Amy

OK

Call Type: Incoming

Caller: Johnson, Amy

Caller Type: (Self)

Consumer: Johnson, Amy

Referred By: Hospital

Age Group: 81 - 85

Gender: Female

Gender Identity: Female

Disabilities: Physically Disabled

Call Priority: Urgent: Needs assistance/action within app...

Start Date/Time: 9/9/2025 10:31 AM

End Date/Time: 9/9/2025 10:34 AM

Seconds Paused: 0

Complete?: Yes

Primary Payment Source: Credit Card

Call Topic Count: 1

Referral Source: Caseworker

Format Property List

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

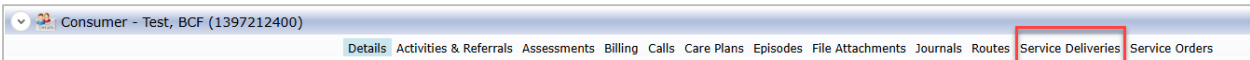
There are two ways to set up a service delivery template:

- 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

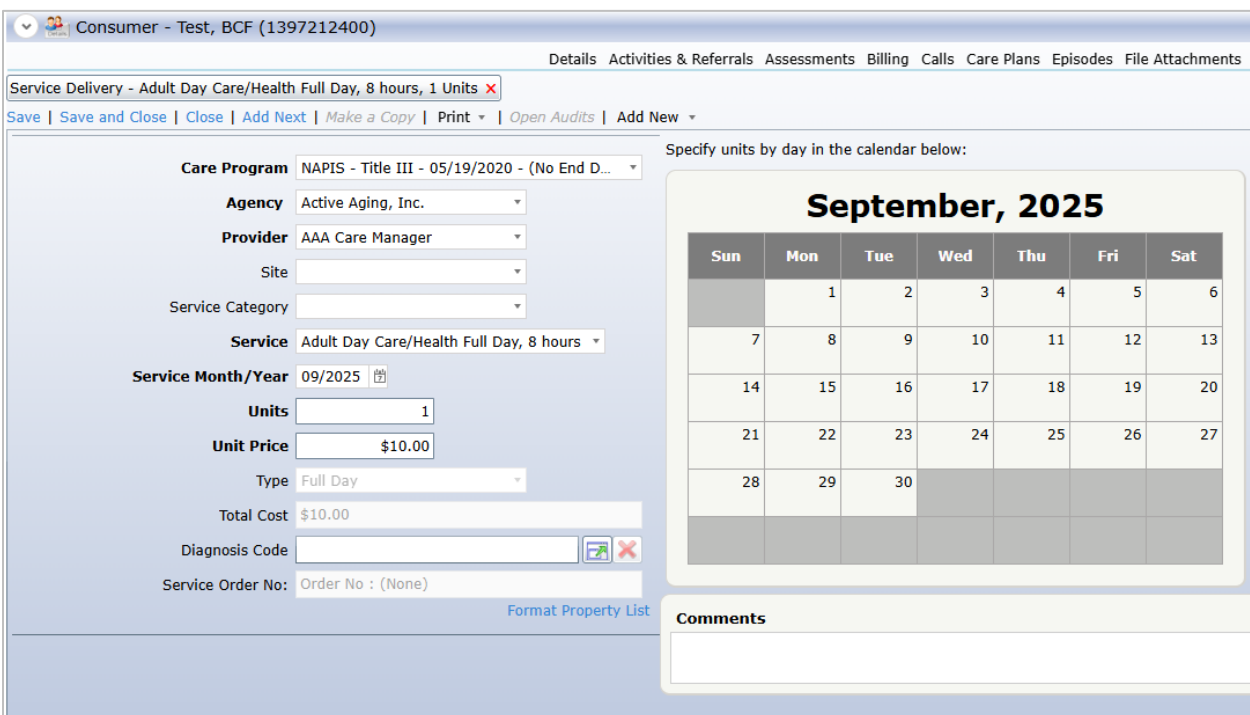
1. Open a test consumer record.
2. Click **Service Deliveries** in the record toolbar.



Consumer - Test, BCF (1397212400)

Details Activities & Referrals Assessments Billing Calls Care Plans Episodes File Attachments Journals Routes **Service Deliveries** Service Orders

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.



Consumer - Test, BCF (1397212400)

Details Activities & Referrals Assessments Billing Calls Care Plans Episodes File Attachments

Service Delivery - Adult Day Care/Health Full Day, 8 hours, 1 Units ✕

Save | Save and Close | Close | Add Next | Make a Copy | Print | Open Audits | **Add New**

Care Program NAPIS - Title III - 05/19/2020 - (No End D...
Agency Active Aging, Inc.
Provider AAA Care Manager
 Site
 Service Category
Service Adult Day Care/Health Full Day, 8 hours
Service Month/Year 09/2025
Units 1
Unit Price \$10.00
 Type Full Day
 Total Cost \$10.00
 Diagnosis Code
 Service Order No: Order No : (None)

Specify units by day in the calendar below:

September, 2025

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

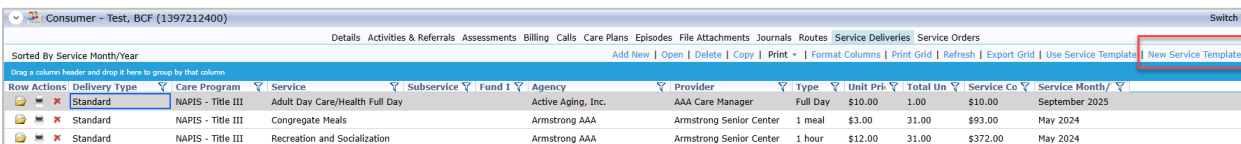
Format Property List

Comments

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.

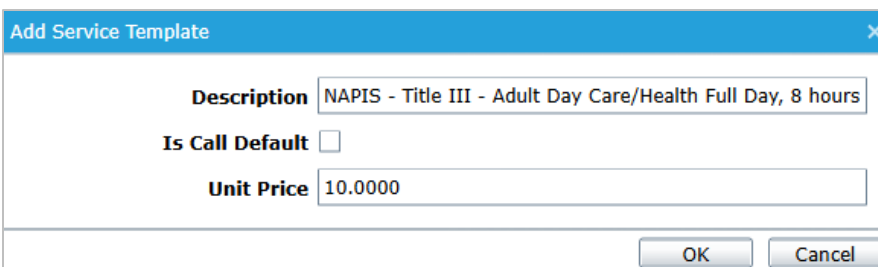
6. Click **Save and Close**.

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



Row Actions	Delivery Type	Care Program	Service	Subservice	Fund 1	Agency	Provider	Type	Unit Pri	Total Un	Service Co	Service Month/
	Standard	NAPIS - Title III	Adult Day Care/Health Full Day			Active Aging, Inc.	AAA Care Manager	Full Day	\$10.00	1.00	\$10.00	September 2025
	Standard	NAPIS - Title III	Congregate Meals			Armstrong AAA	Armstrong Senior Center	1 meal	\$3.00	31.00	\$93.00	May 2024
	Standard	NAPIS - Title III	Recreation and Socialization			Armstrong AAA	Armstrong Senior Center	1 hour	\$12.00	31.00	\$372.00	May 2024

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**.



Add Service Template

Description NAPIS - Title III - Adult Day Care/Health Full Day, 8 hours

Is Call Default ☐

Unit Price 10.0000

OK Cancel

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.

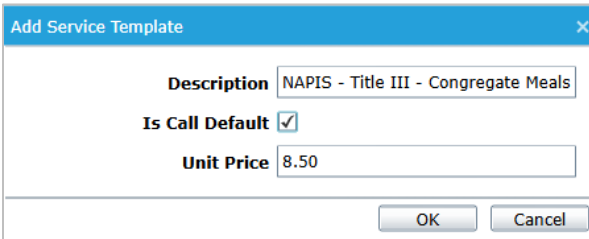
Create a template from an existing service delivery

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.

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



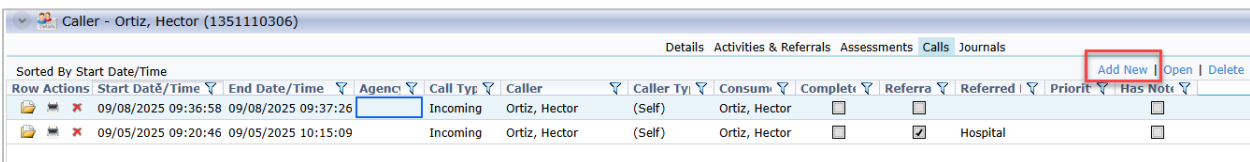
The dialog box titled "Add Service Template" contains the following fields and controls:

- Description:** NAPIS - Title III - Congregate Meals
- Is Call Default:** ☒
- Unit Price:** 8.50
- Buttons:** OK, Cancel

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.

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

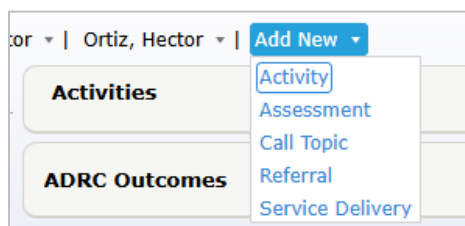


The image shows a consumer record for "Ortiz, Hector (1351110306)". The "Calls" tab is selected in the toolbar. The "Add New" button is highlighted with a red box. Below the toolbar is a table of calls.

Row	Actions	Start Date/Time	End Date/Time	Agency	Call Type	Caller	Caller Type	Consumer	Completed	Referral	Referred	Priority	Has Note
1		09/08/2025 09:36:58	09/08/2025 09:37:26		Incoming	Ortiz, Hector	(Self)	Ortiz, Hector	☐	☐			☐
2		09/05/2025 09:20:46	09/05/2025 10:15:09		Incoming	Ortiz, Hector	(Self)	Ortiz, Hector	☐	☒	Hospital		☐

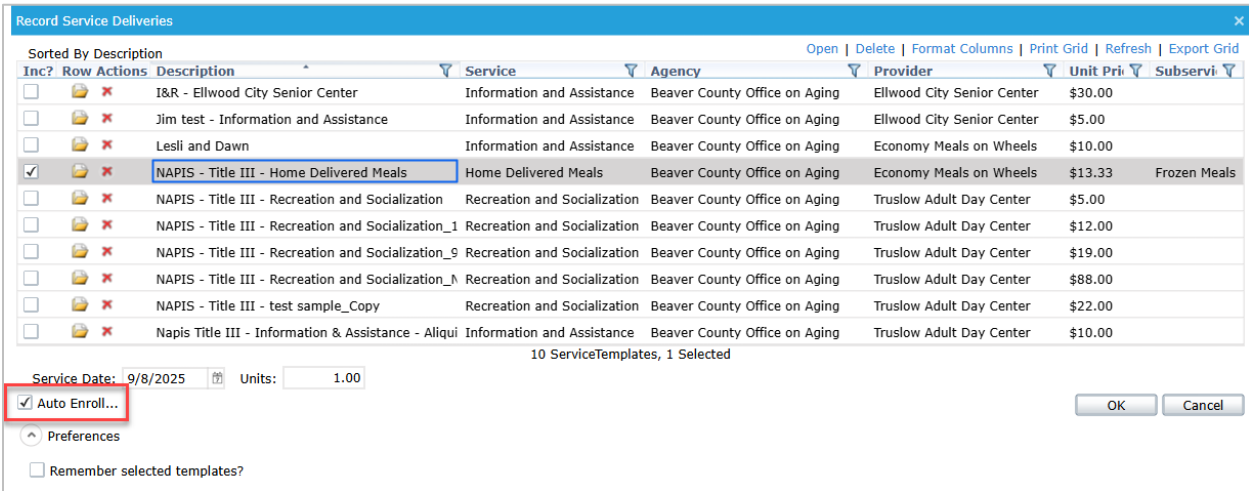
- In the **Service Deliveries** pane, click **Add New**.

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



- Select the service template.
- 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.



Inc?	Row	Actions	Description	Service	Agency	Provider	Unit Pri	Subservi
☐			I&R - Ellwood City Senior Center	Information and Assistance	Beaver County Office on Aging	Ellwood City Senior Center	\$30.00	
☐			Jim test - Information and Assistance	Information and Assistance	Beaver County Office on Aging	Ellwood City Senior Center	\$5.00	
☐			Lesli and Dawn	Information and Assistance	Beaver County Office on Aging	Economy Meals on Wheels	\$10.00	
☒			NAPIS - Title III - Home Delivered Meals	Home Delivered Meals	Beaver County Office on Aging	Economy Meals on Wheels	\$13.33	Frozen Meals
☐			NAPIS - Title III - Recreation and Socialization	Recreation and Socialization	Beaver County Office on Aging	Truslow Adult Day Center	\$5.00	
☐			NAPIS - Title III - Recreation and Socialization_1	Recreation and Socialization	Beaver County Office on Aging	Truslow Adult Day Center	\$12.00	
☐			NAPIS - Title III - Recreation and Socialization_9	Recreation and Socialization	Beaver County Office on Aging	Truslow Adult Day Center	\$19.00	
☐			NAPIS - Title III - Recreation and Socialization_1	Recreation and Socialization	Beaver County Office on Aging	Truslow Adult Day Center	\$88.00	
☐			NAPIS - Title III - test sample_Copy	Recreation and Socialization	Beaver County Office on Aging	Truslow Adult Day Center	\$22.00	
☐			Napis Title III - Information & Assistance - Aliqui	Information and Assistance	Beaver County Office on Aging	Truslow Adult Day Center	\$10.00	

10 ServiceTemplates, 1 Selected

Service Date: 9/8/2025 Units: 1.00

☒ Auto Enroll...

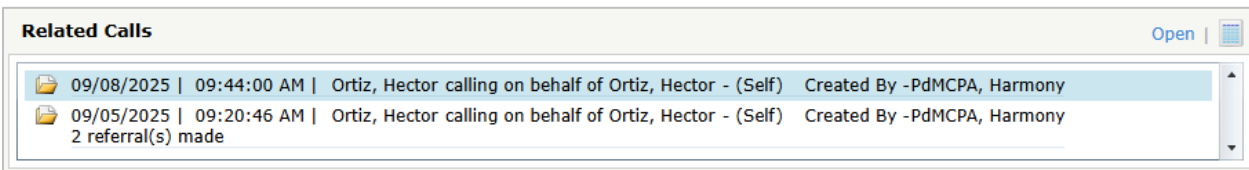
Preferences

☐ Remember selected templates?

OK Cancel

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.



Date	Time	Caller	Created By
09/08/2025	09:44:00 AM	Ortiz, Hector calling on behalf of Ortiz, Hector - (Self)	-PdMCPA, Harmony
09/05/2025	09:20:46 AM	Ortiz, Hector calling on behalf of Ortiz, Hector - (Self)	-PdMCPA, Harmony

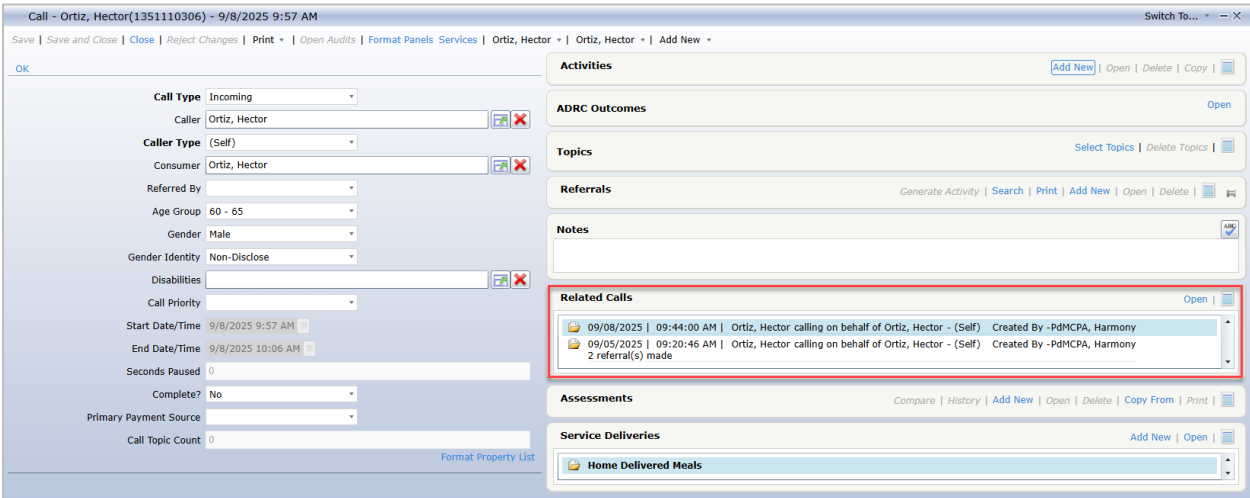
2 referral(s) made

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.



Call - Ortiz, Hector(1351110306) - 9/8/2025 9:57 AM

Save | Save and Close | Close | Reject Changes | Print | Open Audits | Format Panels | Services | Ortiz, Hector | Ortiz, Hector | Add New

OK

Call Type: Incoming
Caller: Ortiz, Hector
Caller Type: (Self)
Consumer: Ortiz, Hector
Referred By:
Age Group: 60 - 65
Gender: Male
Gender Identity: Non-Disclose
Disabilities:
Call Priority:
Start Date/Time: 9/8/2025 9:57 AM
End Date/Time: 9/8/2025 10:06 AM
Seconds Paused: 0
Complete?: No
Primary Payment Source:
Call Topic Count: 0

Activities: Add New | Open | Delete | Copy

ADRC Outcomes: Open

Topics: Select Topics | Delete Topics

Referrals: Generate Activity | Search | Print | Add New | Open | Delete

Notes: ABC

Related Calls: Open

- 09/08/2025 | 09:44:00 AM | Ortiz, Hector calling on behalf of Ortiz, Hector - (Self) Created By - PdMCPA, Harmony
- 09/05/2025 | 09:20:46 AM | Ortiz, Hector calling on behalf of Ortiz, Hector - (Self) Created By - PdMCPA, Harmony

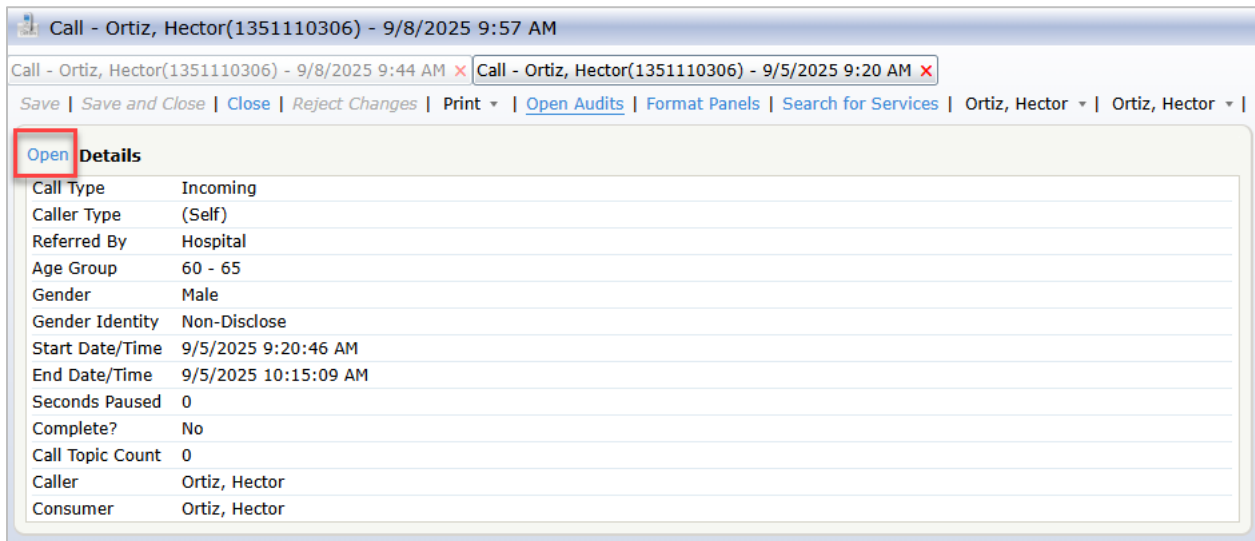
Assessments: Compare | History | Add New | Open | Delete | Copy From | Print

Service Deliveries: Add New | Open

Home Delivered Meals

Format Property List

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



Call - Ortiz, Hector(1351110306) - 9/8/2025 9:57 AM

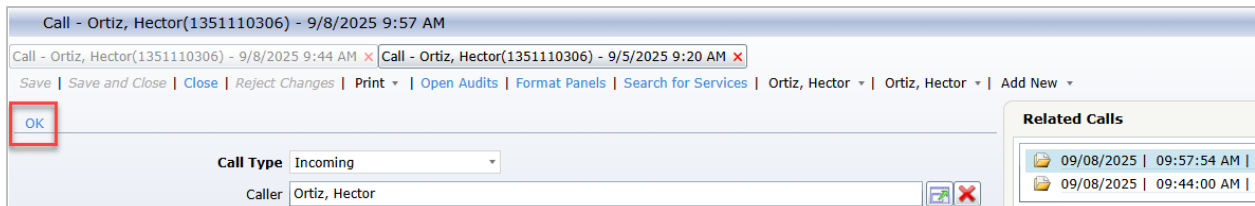
Call - Ortiz, Hector(1351110306) - 9/8/2025 9:44 AM | Call - Ortiz, Hector(1351110306) - 9/5/2025 9:20 AM

Save | Save and Close | Close | Reject Changes | Print | Open Audits | Format Panels | Search for Services | Ortiz, Hector | Ortiz, Hector | Add New

Open Details

Call Type: Incoming
Caller Type: (Self)
Referred By: Hospital
Age Group: 60 - 65
Gender: Male
Gender Identity: Non-Disclose
Start Date/Time: 9/5/2025 9:20:46 AM
End Date/Time: 9/5/2025 10:15:09 AM
Seconds Paused: 0
Complete?: No
Call Topic Count: 0
Caller: Ortiz, Hector
Consumer: Ortiz, Hector

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



Call - Ortiz, Hector(1351110306) - 9/8/2025 9:57 AM

Call - Ortiz, Hector(1351110306) - 9/8/2025 9:44 AM | Call - Ortiz, Hector(1351110306) - 9/5/2025 9:20 AM

Save | Save and Close | Close | Reject Changes | Print | Open Audits | Format Panels | Search for Services | Ortiz, Hector | Ortiz, Hector | Add New

OK

Call Type: Incoming
Caller: Ortiz, Hector

Related Calls

- 09/08/2025 | 09:57:54 AM
- 09/08/2025 | 09:44:00 AM

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.

Consumer - Ackerman, Helen (1380167714)

Details | Activities & Referrals | Assessments | Billing | Calls | Care Plans | Episodes

Save | Save and Close | Close | Reject Changes | Print | Open Audits | Format Panels | Status Wizard | Merge | Copy Client ID | MCI Update | Add

Assessment completion time

Consents

Can photo be used? Don't Know

Medicaid

Medicaid Prog. Admission Date

Annual Household Income

Annual Household Income (Not Specified)

Emergency Preparedness

Contact in event of disaster Don't Know

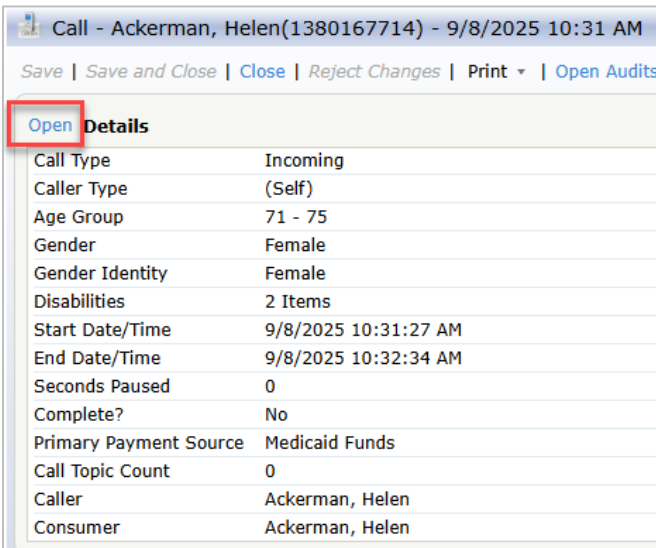
Evacuation Assistance Needed? Don't Know

Recent Calls

Row	Actions	Start Date/Time	End Date/Time	Agency	Call Type	Caller	Caller Type	Consumer
1	  	09/08/2025 10:31:27 AM	09/08/2025 10:32:34 AM		Incoming	Ackerman, Helen (Self)		Ackerman, Helen
2	  	05/15/2025 02:14:48 PM	05/15/2025 02:15:24 PM		Incoming	(Anonymous)	Other	Ackerman, Helen
3	  	01/12/2024 03:28:26 PM	01/12/2024 03:29:03 PM		Incoming	Ackerman, Helen (Self)		Ackerman, Helen

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

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



Call - Ackerman, Helen(1380167714) - 9/8/2025 10:31 AM

Save | Save and Close | Close | Reject Changes | Print ▾ | Open Audits

Open Details

Call Type	Incoming
Caller Type	(Self)
Age Group	71 - 75
Gender	Female
Gender Identity	Female
Disabilities	2 Items
Start Date/Time	9/8/2025 10:31:27 AM
End Date/Time	9/8/2025 10:32:34 AM
Seconds Paused	0
Complete?	No
Primary Payment Source	Medicaid Funds
Call Topic Count	0
Caller	Ackerman, Helen
Consumer	Ackerman, Helen

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

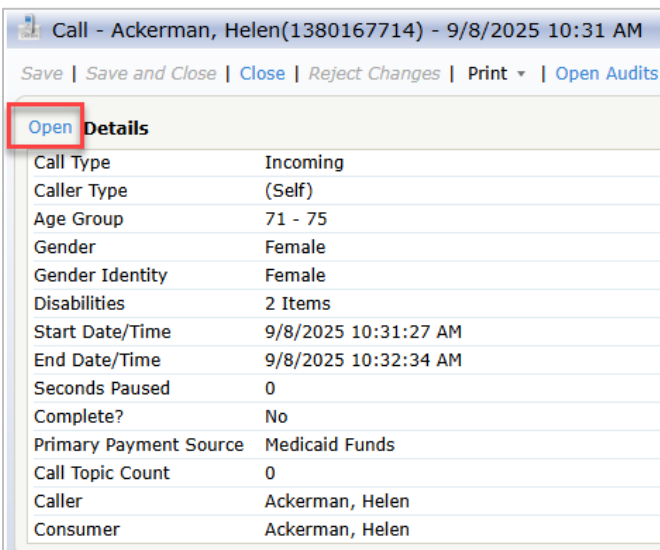
Edit a consumer record

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**.



Call - Ackerman, Helen(1380167714) - 9/8/2025 10:31 AM

Save | Save and Close | Close | Reject Changes | Print ▾ | Open Audits

Open Details

Call Type	Incoming
Caller Type	(Self)
Age Group	71 - 75
Gender	Female
Gender Identity	Female
Disabilities	2 Items
Start Date/Time	9/8/2025 10:31:27 AM
End Date/Time	9/8/2025 10:32:34 AM
Seconds Paused	0
Complete?	No
Primary Payment Source	Medicaid Funds
Call Topic Count	0
Caller	Ackerman, Helen
Consumer	Ackerman, Helen

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.

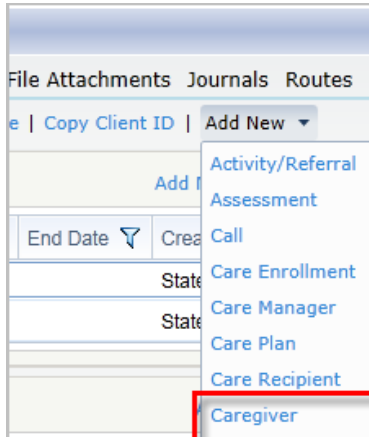
NOTE - Federal guidelines state that the caregiver and care recipient relationship is reported annually, along with the services that both parties have received.

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**.

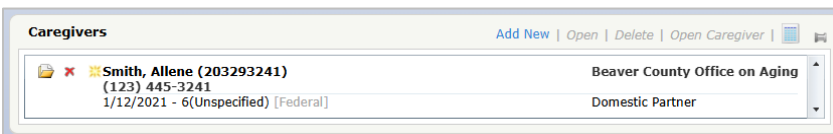


3. In the **Caregiver** field, click the **Open Dialog** button to verify if the caregiver has a record in Aging & Disability.
4. Type the search criteria and then click **Search**.
5. If a matching record is found, double-click it.
 - a. Select the **Caregiver Relationship to Care Recipient** and edit other data, as needed.

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

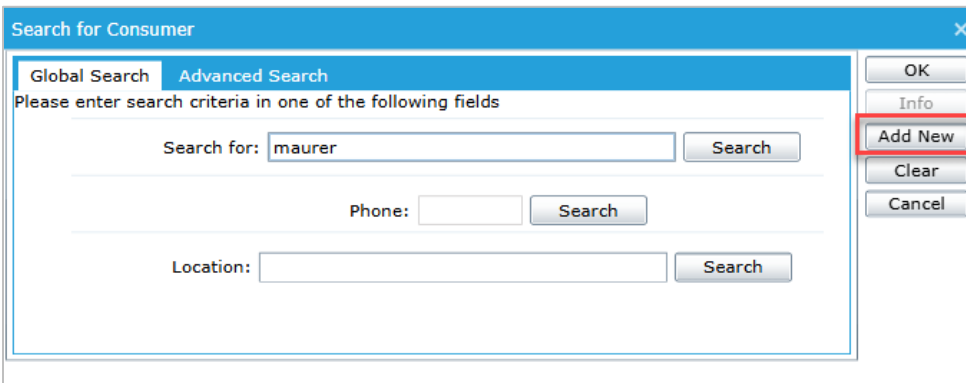


c. The Caregiver is added to the consumer record.



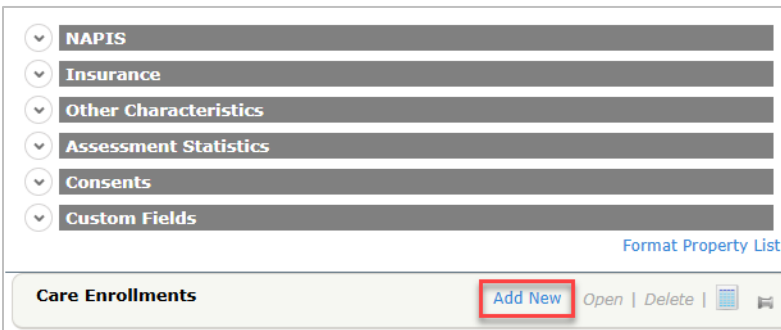
6. If no matches are found, click **OK**.

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

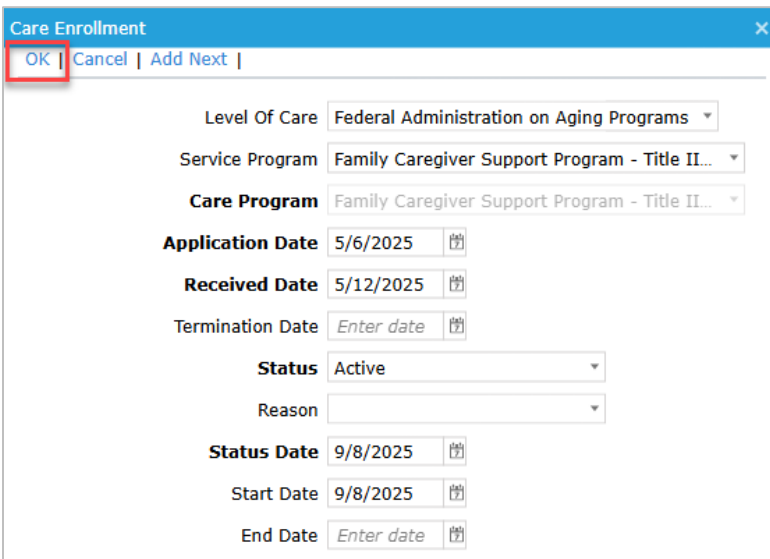


b. Complete the required fields, indicated in bold, and other fields, as needed.

- 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**.



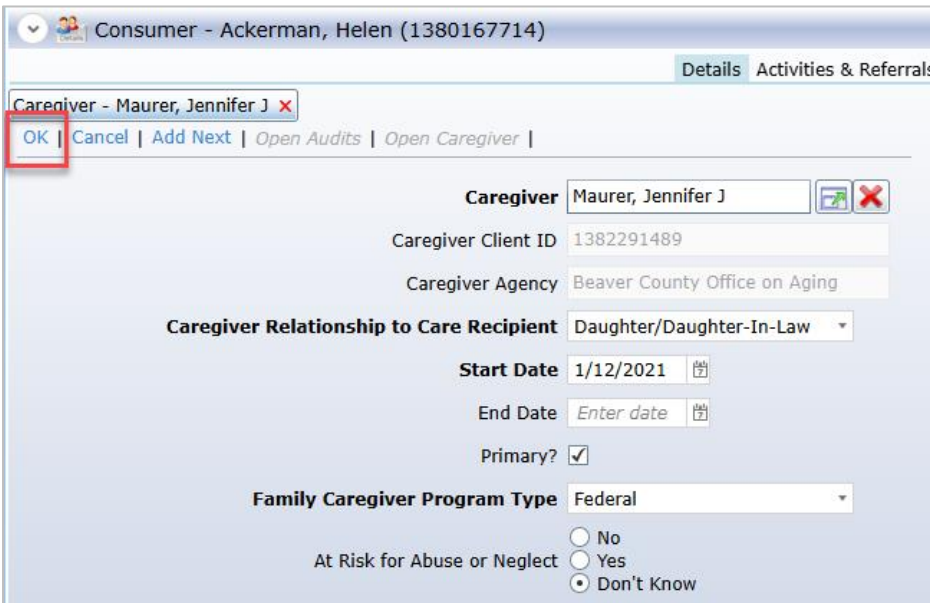
- f. On the Add Consumer screen, click **OK** to finish adding the Caregiver to the consumer record. You will automatically be brought to the Caregiver section of the consumer record.

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

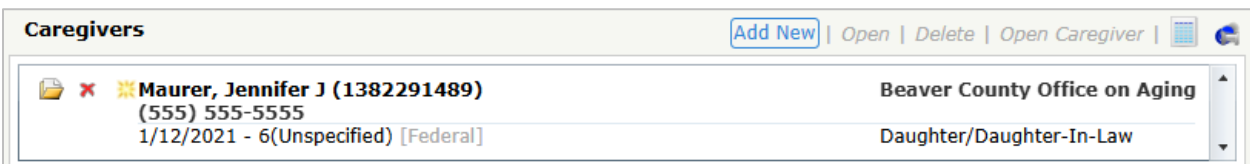


8. Double-click the recently added caregiver.
9. In the **Caregiver Relationship to Care Recipient** field, click the arrow to see more options and then select the relationship.
10. Edit the **Start Date**, if needed. The start date must be before the service delivery dates.
11. In the **Family Caregiver 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.

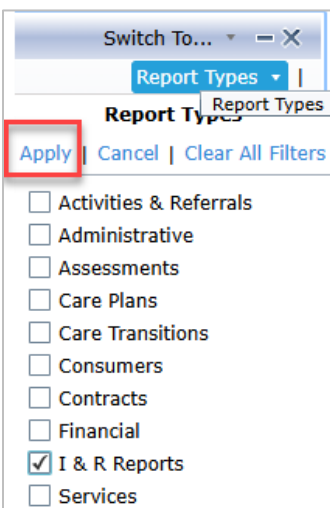
Reports templates are displayed in the upper portion of the screen. When you click a report template, the custom **Report Definitions** that have been created from the template are displayed in the lower portion of the screen.

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.

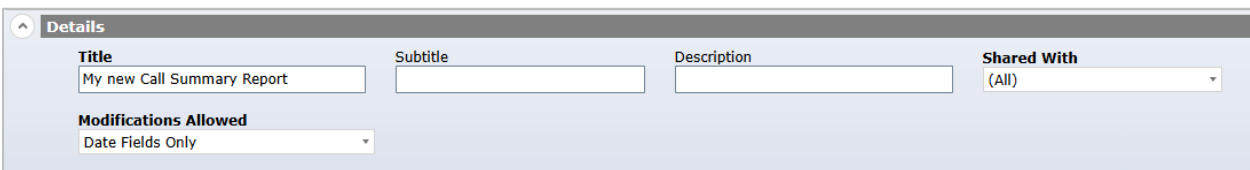


TIP – Standard reports are displayed in the upper part of the screen, and customized report definitions are displayed in the lower part of the screen.

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.



Details

Title My new Call Summary Report	Subtitle 	Description 	Shared With (All)
Modifications Allowed Date Fields Only			

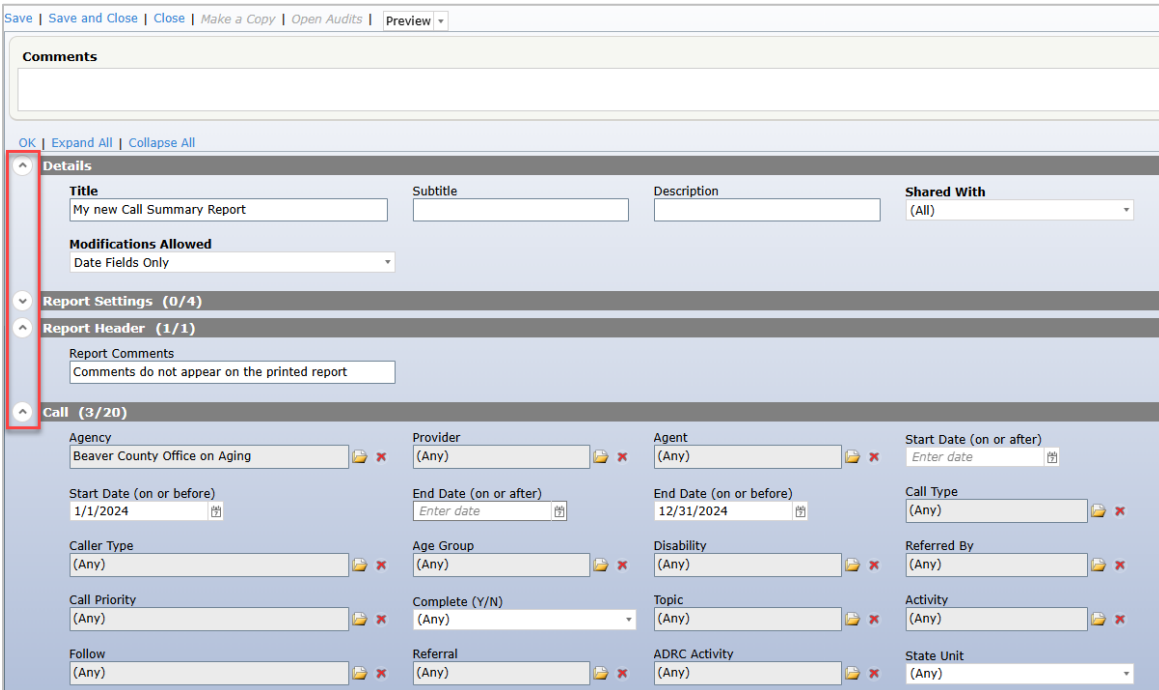
Select report filters

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.

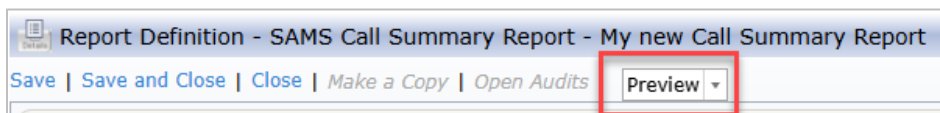
1. To display the filters that are available in each section, click the arrow to the left of the section title. The arrow changes to an upward-facing arrow. Click the arrow again to collapse the section.

- 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.



- 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

Consumer Details
 Abernathy, James R [1353121640]

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
 Provider: Armstrong Senior Center
 Notes:
 Service: Nutrition Counseling

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:

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:

Due Date: 11/3/2011 Complete? Yes

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**.

Report Definition - SAMS Call Summary Report - My new Call Summary Report

Save
Save and Close
Close
|
Make a Copy
|
Open Audits
|

Preview ▾

- 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.

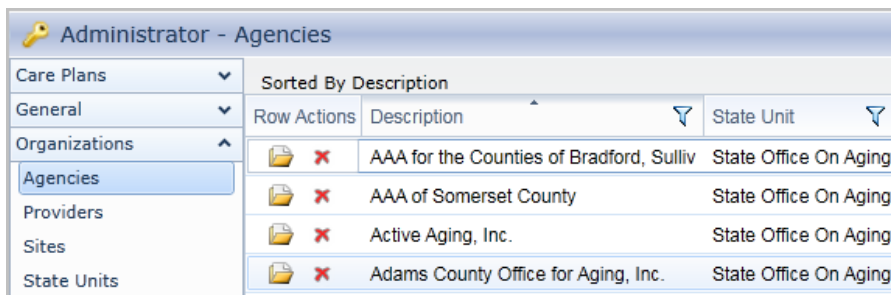
Access roles & privileges

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

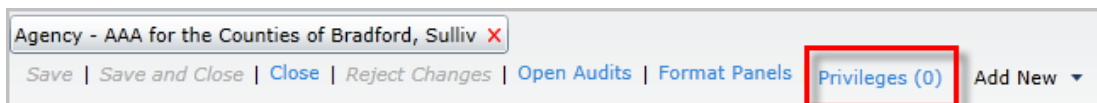
Agencies, providers, sites, and state units must be granted access to call records, then privileges are assigned to the Calls Module.

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.



Administrator - Agencies		
Care Plans	Sorted By Description	
General	Row Actions	Description
Organizations		State Unit
Agencies		AAA for the Counties of Bradford, Sullivan
Providers		AAA of Somerset County
Sites		Active Aging, Inc.
State Units		Adams County Office for Aging, Inc.

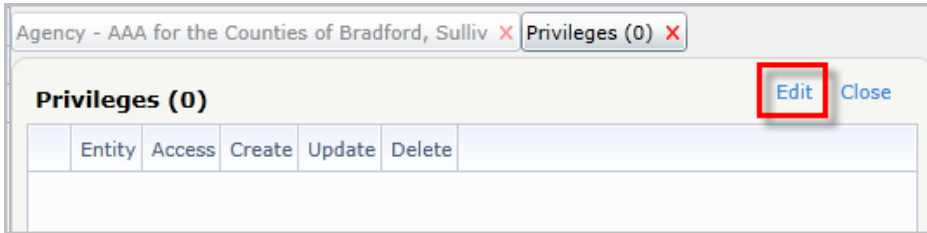
3. In the entity's record toolbar, click **Privileges**.



Agency - AAA for the Counties of Bradford, Sullivan

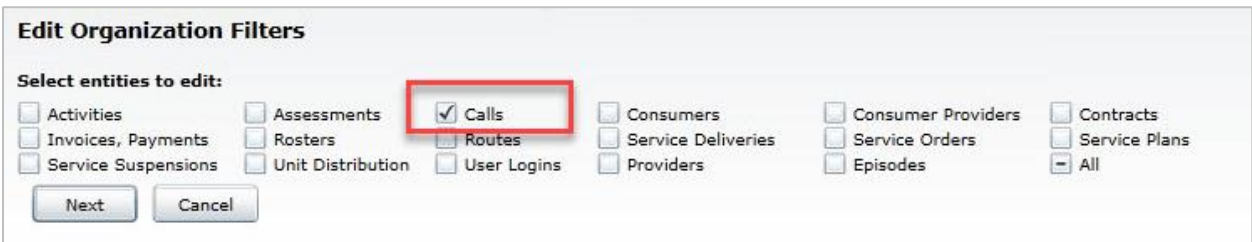
Save | Save and Close | Close | Reject Changes | Open Audits | Format Panels | **Privileges (0)** | Add New

4. Click **Edit**.



The screenshot shows a window titled "Agency - AAA for the Counties of Bradford, Sulliv" and "Privileges (0)". Inside the window, there is a section labeled "Privileges (0)" with an "Edit" button highlighted by a red box. Below this section is a table with columns: Entity, Access, Create, Update, and Delete.

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

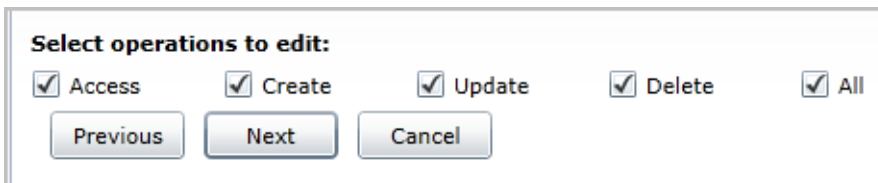


The screenshot shows the "Edit Organization Filters" window. Under the "Select entities to edit:" section, the "Calls" checkbox is checked and highlighted by a red box. Other checkboxes include Activities, Assessments, Consumers, Consumer Providers, Contracts, Invoices, Payments, Rosters, Routes, Service Deliveries, Service Orders, Service Plans, Service Suspensions, Unit Distribution, User Logins, Providers, Episodes, and All. At the bottom, there are "Next" and "Cancel" buttons.

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.

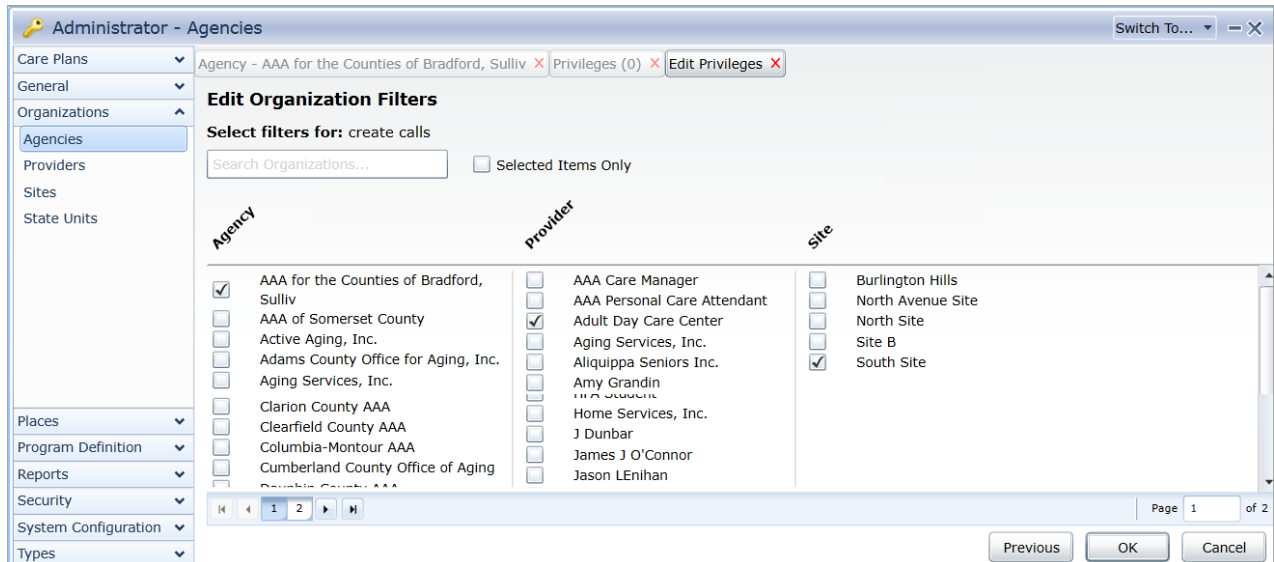
7. Click **Next**.



The screenshot shows the "Select operations to edit:" window. The checkboxes for "Access", "Create", "Update", "Delete", and "All" are all checked. At the bottom, there are "Previous", "Next", and "Cancel" buttons.

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

9. Click **OK**.



Administrator - Agencies

Agency - AAA for the Counties of Bradford, Sullivan ✖ Privileges (0) ✖ Edit Privileges ✖

Edit Organization Filters

Select filters for: create calls

Search Organizations...

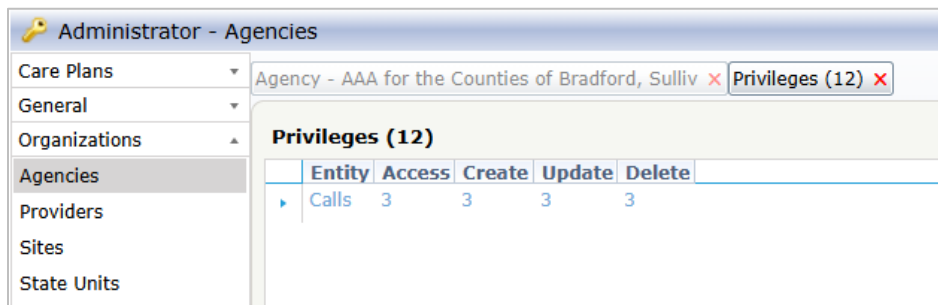
☐ Selected Items Only

Agency	Provider	Site
☒ AAA for the Counties of Bradford, Sullivan	☐ AAA Care Manager	☐ Burlington Hills
☐ AAA of Somerset County	☐ AAA Personal Care Attendant	☐ North Avenue Site
☐ Active Aging, Inc.	☒ Adult Day Care Center	☐ North Site
☐ Adams County Office for Aging, Inc.	☐ Aging Services, Inc.	☐ Site B
☐ Aging Services, Inc.	☐ Aliquippa Seniors Inc.	☒ South Site
☐ Clarion County AAA	☐ Amy Grandin	
☐ Clearfield County AAA	☐ Home Services, Inc.	
☐ Columbia-Montour AAA	☐ J Dunbar	
☐ Cumberland County Office of Aging	☐ James J O'Connor	
☐ Seneca County AAA	☐ Jason Lenihan	

Page 1 of 2

Previous OK Cancel

10. A summary of the privileges is displayed.



Administrator - Agencies

Agency - AAA for the Counties of Bradford, Sullivan ✖ Privileges (12) ✖

Privileges (12)

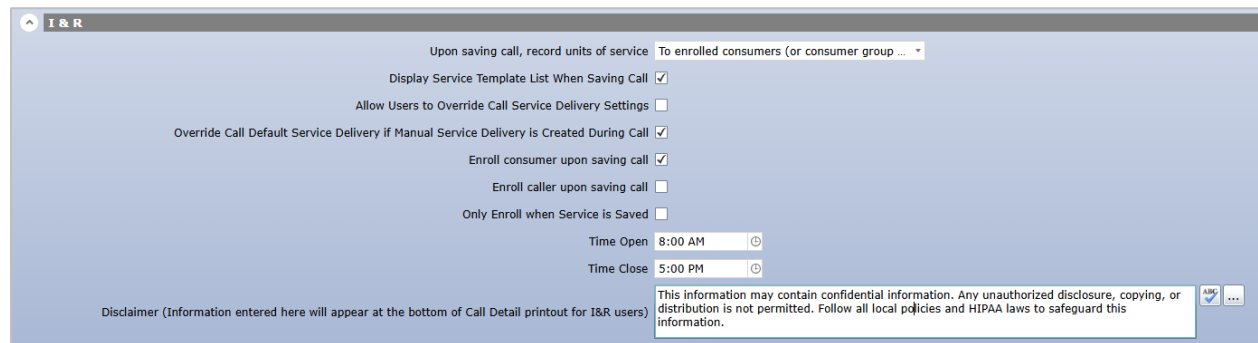
Entity	Access	Create	Update	Delete
▶ Calls	3	3	3	3

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 <i>are also saved</i> . 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 <i>are not saved</i> . 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.

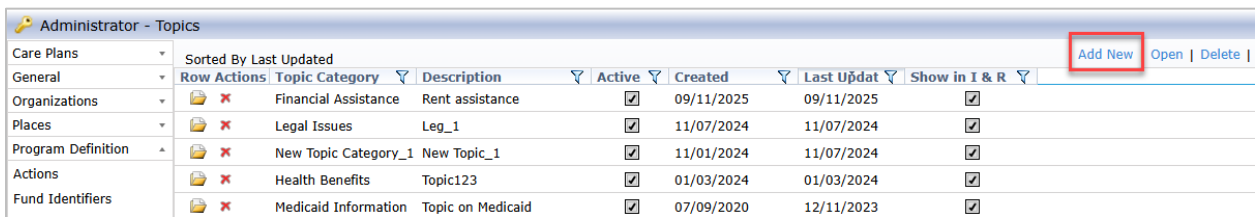
Field	Description
Enroll caller upon saving call	Automatically enrolls a caller in the default Care Enrollment program.
Only Enroll when Service is Saved	Enrolls the consumer in the default Care Enrollment program only when the service is saved.
Time Open / Time Close	Identifies the hours of operation 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.

- 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.

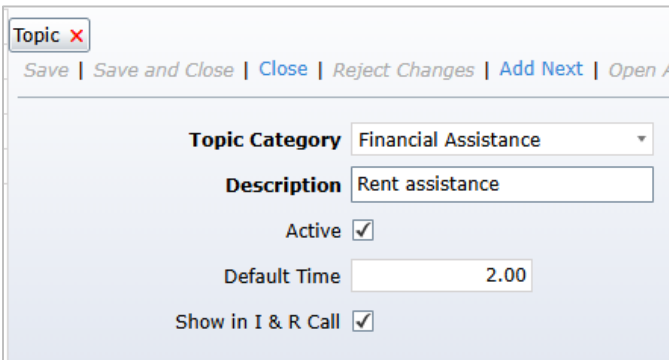
- From the **Navigation** bar, click **Administrator > Program Definition**. You may need to click the vertical ellipsis to see this option.
- Select **Topics**.
- Click **Add New**.



Administrator - Topics							
Sorted By Last Updated							
Row	Actions	Topic Category	Description	Active	Created	Last Updated	Show in I & R
1	 	Financial Assistance	Rent assistance	☒	09/11/2025	09/11/2025	☒
2	 	Legal Issues	Leg_1	☒	11/07/2024	11/07/2024	☒
3	 	New Topic Category_1	New Topic_1	☒	11/01/2024	11/07/2024	☒
4	 	Health Benefits	Topic123	☒	01/03/2024	01/03/2024	☒
5	 	Medicaid Information	Topic on Medicaid	☒	07/09/2020	12/11/2023	☒

- Select a **Topic Category** and add a **Description**.
- Add a **Default Time**, if needed. This is the default time spent on the topic; however, users can edit the time if required.
- To display the Topic in the I&R Module, select **Show in I & R Call**.

7. Click **Save and Close**.

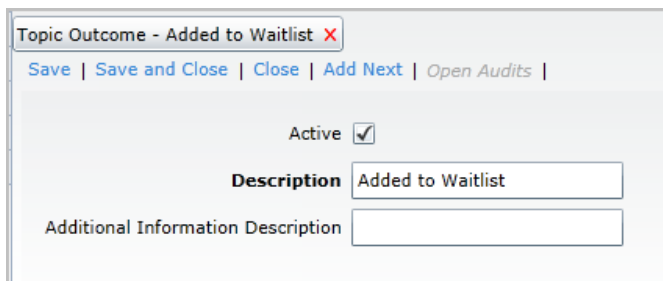


The screenshot shows a 'Topic' form with a title bar 'Topic' and a close button. The toolbar includes 'Save', 'Save and Close', 'Close', 'Reject Changes', 'Add Next', and 'Open A'. The form fields are: 'Topic Category' (dropdown menu showing 'Financial Assistance'), 'Description' (text box with 'Rent assistance'), 'Active' (checkbox checked), 'Default Time' (text box with '2.00'), and 'Show in I & R Call' (checkbox checked).

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**.



The screenshot shows a 'Topic Outcome - Added to Waitlist' form with a title bar and a close button. The toolbar includes 'Save', 'Save and Close', 'Close', 'Add Next', and 'Open Audits'. The form fields are: 'Active' (checkbox checked), 'Description' (text box with 'Added to Waitlist'), and 'Additional Information Description' (text box).

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**.

- From the menu on the left, select **Call Types**.
- Click **Add a new record** in the upper right corner of the screen.

Administrator - Call Types

Sorted By Description

☐ Active System Generated Description ↑ Created Last Updated

(All) (All)

	Active	System Generated	Description ↑	Created	Last Updated
☐	✓		Email	12/08/2007	02/10/2021
☐	✓	✓	Incoming	12/08/2007	04/28/2008
☐	✓		Incoming from Hotline	06/29/2020	12/06/2023
☐	✓		None	02/26/2015	02/26/2015
☐	✓	✓	Outgoing	12/08/2007	04/28/2008
☐	✓		Walk-In	12/08/2007	04/28/2008
☐	✓		Written Communication	12/07/2023	12/07/2023

- The **Active** field defaults to **Yes**. Move the slider to the left to deactivate it.
- Add a **Description** and click either **Save** or **Add Next**.

Details

Active	☒
System Generated	☐
Description *	Written Communication

REVERT CANCEL SAVE 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.

- Click **Administrator > Types**.
- From the menu on the left, select **Caller Types**.

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

Administrator - Caller Types

Sorted By Created

		Active	System Generated	Description	Created ↓	Last Updated
☐		(All) ▾	(All) ▾			
☐		✓		Member of the clergy	12/07/2023	12/07/2023
☐		✓		Anonymous	06/29/2020	12/06/2023
☐		✓		Spouse	12/08/2007	04/28/2008
☐		✓		Son/Daughter	12/08/2007	04/28/2008
☐		✓		Parent	12/08/2007	04/28/2008
☐		✓	✓	Other	12/08/2007	04/28/2008

- The **Active** field defaults to **Yes**. Move the slider to the left to deactivate it.
- Add a **Description** and click either **Save** or **Add Next**.

Details ^

Active	☒
System Generated	☐
Description *	Member of the clergy

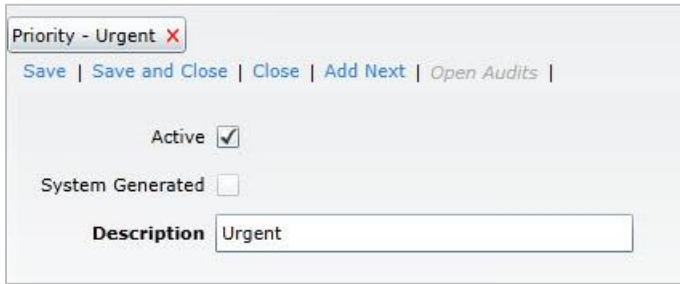
REVERT CANCEL SAVE ADD NEXT

Add a Call Priority

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

- Click **Administrator > General > Priorities**.
- Click **Add New** in the **Priorities** toolbar.
 - The **Active** option is selected by default. Clear the check box to deactivate it.
 - The **System Generated** option identifies if the Call Priority is automatically included with the solution; it cannot be edited.
- Add a **Description**.

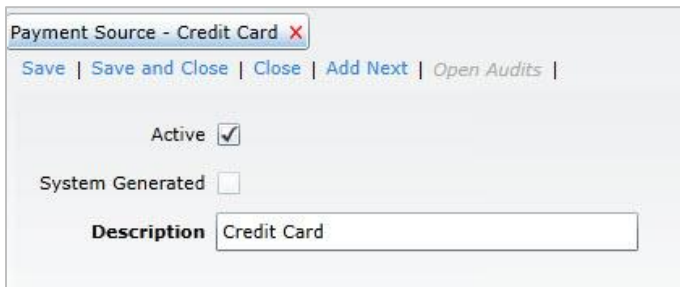
4. Click **Save** or **Save and Close**.



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**.

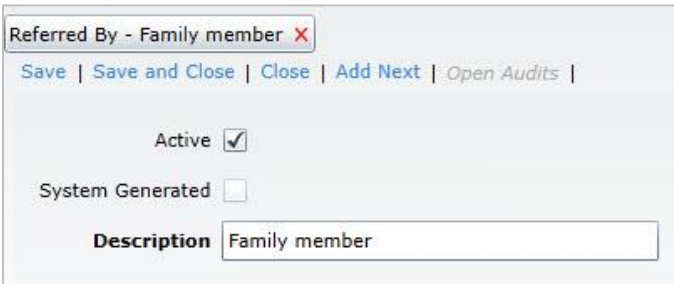


Add a Referred By entry

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**.



Referred By - Family member X

Save | Save and Close | Close | Add Next | Open Audits |

Active ☒

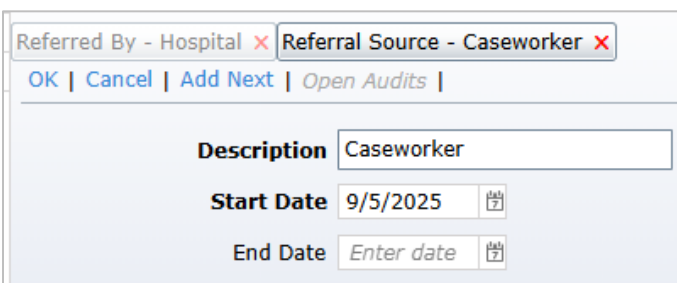
System Generated ☐

Description Family member

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**.



Referred By - Hospital X Referral Source - Caseworker X

OK | Cancel | Add Next | Open Audits |

Description Caseworker

Start Date 9/5/2025

End Date Enter date

4. Click **Save and Close**.

Configure provider organizations

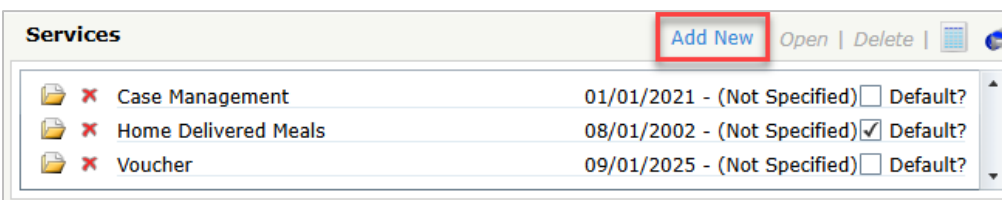
There are two types of providers in Aging & Disability: Care Managers and Provider Organizations, but only Provider Organizations are used with the Aging & Disability I&R Module. Provider organizations contain information that is useful for incoming calls, including hours of operation, location, and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

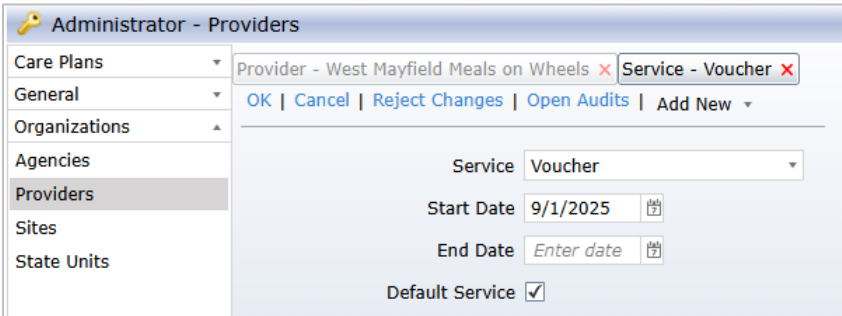
The **Services** pane lists the services that each provider offers to consumers. To add a new service:

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**.

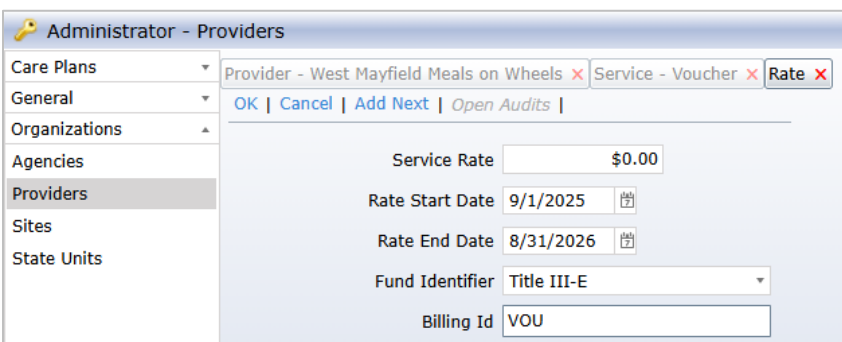


The screenshot shows the 'Administrator - Providers' window. On the left is a navigation menu with 'Providers' selected. The main area shows a provider record for 'West Mayfield Meals on Wheels' and a service record for 'Voucher'. The 'Service' dropdown is set to 'Voucher'. Below it, the 'Start Date' is '9/1/2025' and the 'End Date' is 'Enter date'. The 'Default Service' checkbox is checked. At the top, there are buttons for 'OK', 'Cancel', 'Reject Changes', 'Open Audits', and 'Add New'.

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.



The screenshot shows the 'Administrator - Providers' window with the 'Rate' pane open. The provider record is 'West Mayfield Meals on Wheels' and the service record is 'Voucher'. The 'Rate' pane shows the 'Service Rate' as '\$0.00', 'Rate Start Date' as '9/1/2025', 'Rate End Date' as '8/31/2026', 'Fund Identifier' as 'Title III-E', and 'Billing Id' as 'VOU'. At the top, there are buttons for 'OK', 'Cancel', 'Add Next', and 'Open Audits'.

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

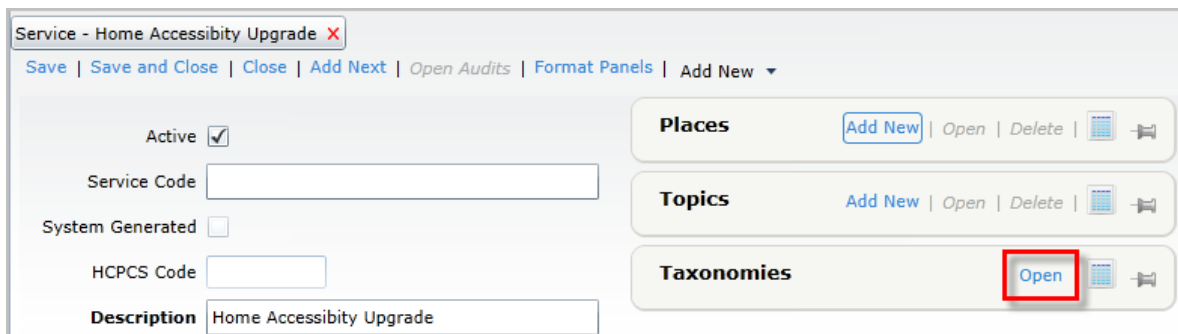
Add a taxonomy code

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**.

Service - Assisted Transportation ×
Taxonomies ×

Close
Search

Taxonomy Terms

B Basic Needs

BD Food

BH Housing/Shelter

BM Material Goods

BT Transportation

BV Utilities

D Consumer Services

F Criminal Justice and Legal Services

H Education

J Environment and Public Health/Safety

L Health Care

N Income Support and Employment

P Individual and Family Life

R Mental Health and Substance Use Disorder Services

T Organizational/Community/International Services

Y Target Populations

>

<

<<

Code	Taxonomy Term
B	Basic Needs
BT	Transportation

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.

Search for Services

Switch To...

AAA Personal Care Attendant

Add

Show Links

Service Provider

Short Description

Services:

Adult Day Care/Health Full Day: 8 hours, Adult Day Care/Health Hourly, Assisted Transportation, Bathroom Modification, Bed Rails, Caregiver Outreach and Education, Case Management, Counseling / Self-Mgmt Support, Environmental Modifications, FCSP Assistive Devices, FCSP Case Management, FCSP Information and Assistance, FCSP Legal Assistance, FCSP Transportation, FCSP Visiting, FCSP Assisted Transportation, Personal Care, R7/Service, 31stJuly

Phones:

Home (210) 120-1012 x 34344 Business (452) 200-0045 x 45245

Eligibility:

Abused/neglected, Jewish, Unemployed

Keywords:

Abuse/neglect/exploitation, Ethnic Services, Intergenerational

Languages:

English, French

Agencies:

AAA for the Counties of Bradford, Sullivan (bvnvbb), AAA of Somerset County TEST [Somerset], Active Aging, Inc. [Active Aging], Adams County Office for Aging, Inc. [Adams County], Aging Services, Inc. [Aging Svs.], Allegheny County Department of Aging [Allegheny], Armstrong AAA [Armstrong], Beaver County Office on Aging [Beaver Cty], Blair Senior Services, Inc. [Blair S.S.], Bucks County AAA [Bucks County], Cambria County AAA [Cambria Cty], Carbon County AAA [Carbon Cty], MubeaenAgency03072024 [M6030724], R2 Testing, R7/Agency-31stJuly, RI-Agency-1, Testing34444

Sites:

test-site

Service Areas:

Aaronsburg township, Adah township, Adamsburg township, Akron township, Allenwood township, Altoona township, Alverda township, Ambridge township, Amity township, Anankomink township, Ardara township, Arona township, Atglen township, Athens township, Auburn township, Awoodale township, Bainfield township, Bakers Summit township, Bangor township, Barnesboro township, Bath township, Bauman township, Beaver Meadows township, Bedminster township, Benderville township, Benazett township, Berwyn township, Bethel (Basic Needs), B (Basic Needs), BD-1875.1500 (Community Wide Food Storage Facilities), BT (Transportation), LH-0600.5000-850 (Transfer Devices), LH-0650 (Assistive Technology Equipment Provision Options), LH-0650.0700-015 (Assistive Technology Equipment Acquisition Assistance), LH-0650.0700-080 (Assistive Technology Support Services Expense Assistance), PH-3300.0500 (Personal Care), YE-1450 (Citizens)

Types:

I & R Program and Service Provider

Fees:

Donations (\$10.00 Affordable)

Hours of Operation:

Monday 9:00 AM to 5:00 PM, Tuesday 9:00 AM to 5:00 PM, Wednesday 9:00 AM to 5:00 PM, Thursday 9:00 AM to 5:00 PM, Friday 9:00 AM to 5:00 PM, Saturday 9:00 AM to 12:00 PM

Last Updated:

9/5/2025

Matched on:

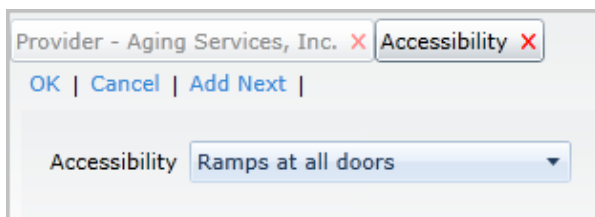
Services x5

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.



Provider - Aging Services, Inc. X Accessibility X

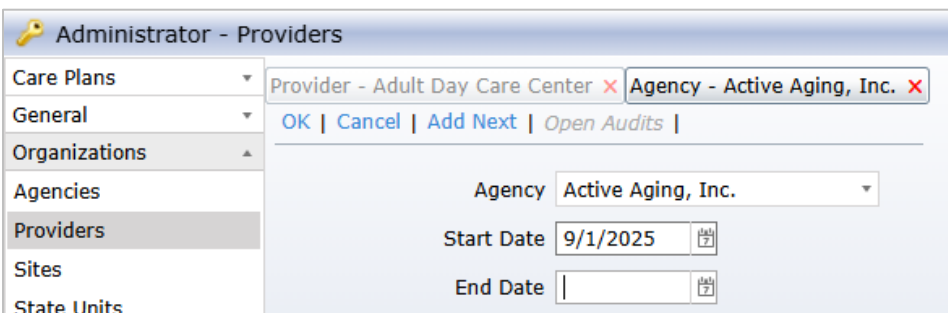
OK | Cancel | Add Next |

Accessibility Ramps at all doors ▼

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**.



Administrator - Providers

Care Plans ▼

General ▼

Organizations ▲

Agencies

Providers

Sites

State Units

Provider - Adult Day Care Center X Agency - Active Aging, Inc. X

OK | Cancel | Add Next | Open Audits |

Agency Active Aging, Inc. ▼

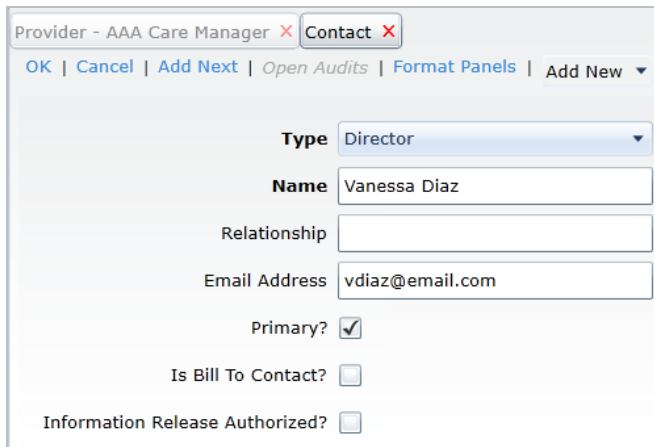
Start Date 9/1/2025 📅

End Date | 📅

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**.

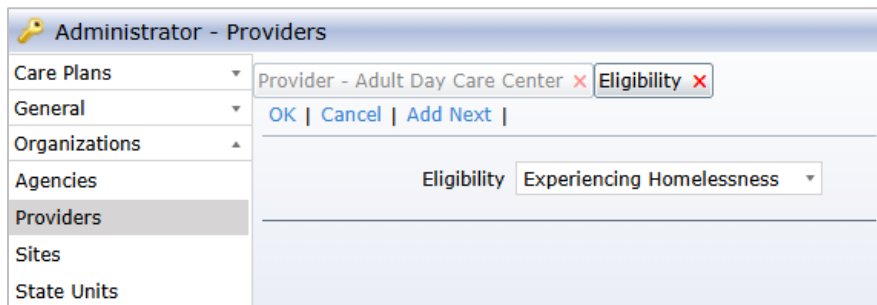


7. To add additional details about the contact, click **Add New** in the **Phones** or **Locations** panes.
8. To add freeform notes about the contact, type them in the **Notes** pane.

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.

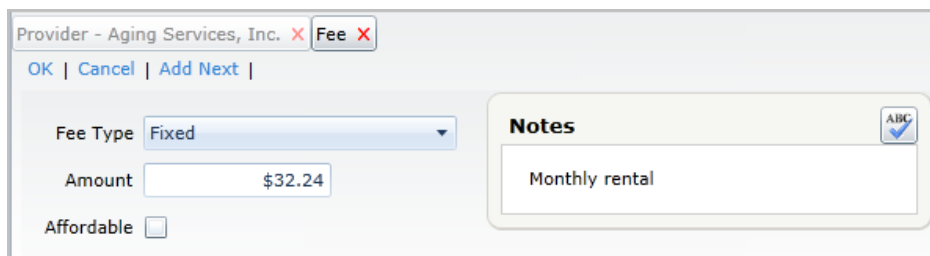
1. With the provider record open, click the **Add New** menu, and then select **Eligibility**.
2. Select the Eligibility.
3. Click **Add Next** to add additional eligibilities or **OK** to finish.



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**.

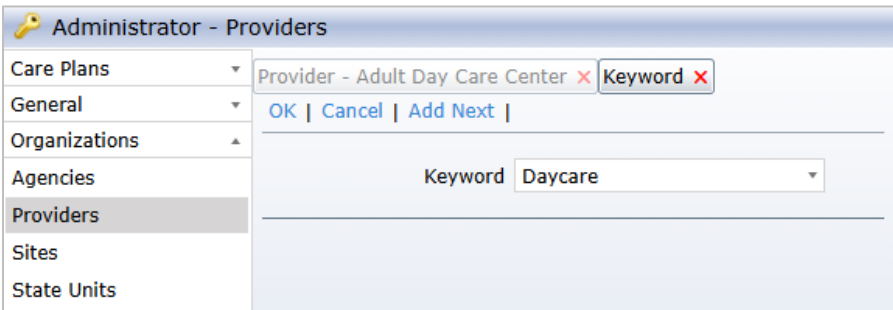


Keywords

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**.

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

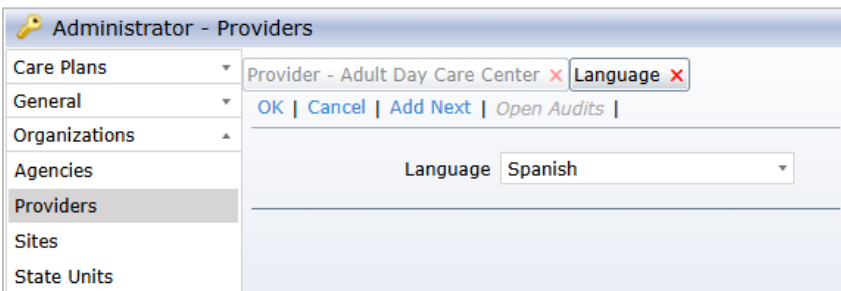


The screenshot shows the 'Administrator - Providers' window. On the left is a sidebar with a tree view containing 'Care Plans', 'General', 'Organizations', 'Agencies', 'Providers' (highlighted), 'Sites', and 'State Units'. The main area has a header 'Provider - Adult Day Care Center' with a red 'X' icon and a 'Keyword' field with a red 'X' icon. Below the header are buttons: 'OK', 'Cancel', and 'Add Next'. The 'Keyword' field is a dropdown menu currently showing 'Daycare'.

Language

To identify the languages spoken at a provider:

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

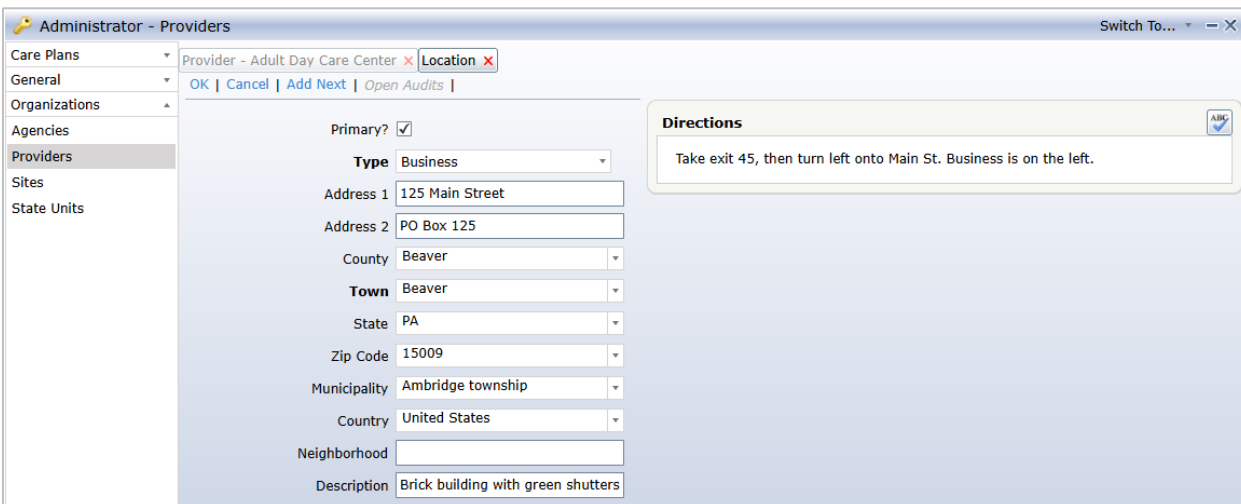


The screenshot shows the 'Administrator - Providers' window. The sidebar is the same as in the previous screenshot. The main area header is 'Provider - Adult Day Care Center' with a red 'X' icon and a 'Language' field with a red 'X' icon. Below the header are buttons: 'OK', 'Cancel', 'Add Next', and 'Open Audits'. The 'Language' field is a dropdown menu currently showing 'Spanish'.

Location

The Location pane includes addresses for several location types.

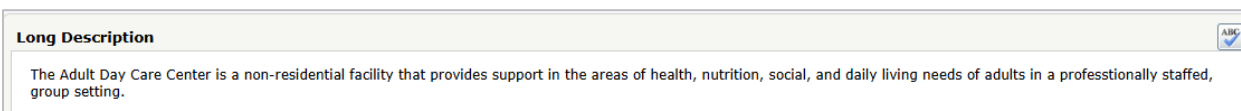
- With the provider record open, click the **Add New** menu, and then select **Location**.
- Select the location **Type** and **Town** (required fields).
- Complete additional fields as needed.
- To add directions, type text in the **Directions** box.
- Click **Add Next** to add additional locations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

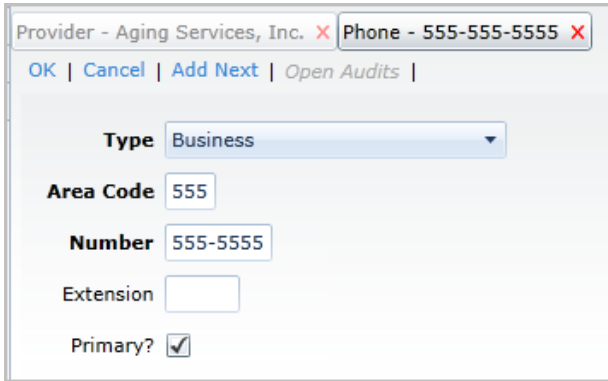
1. With the provider record open, type text into Notes box. To check spelling, click **Spell Check**.
2. Click **Save** or **Save and Close**.



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 - Aging Services, Inc. X Phone - 555-555-5555 X

OK | Cancel | Add Next | Open Audits |

Type Business

Area Code 555

Number 555-5555

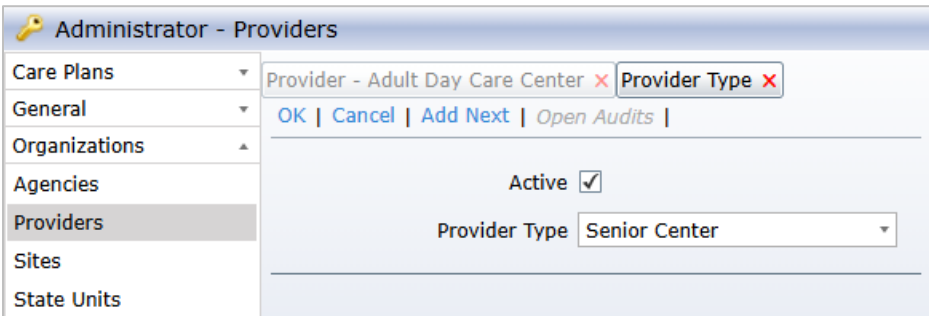
Extension

Primary? ☒

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.



Administrator - Providers

Care Plans ▼ Provider - Adult Day Care Center X Provider Type X

General ▼ OK | Cancel | Add Next | Open Audits |

Organizations ▲

Agencies

Providers

Sites

State Units

Active ☒

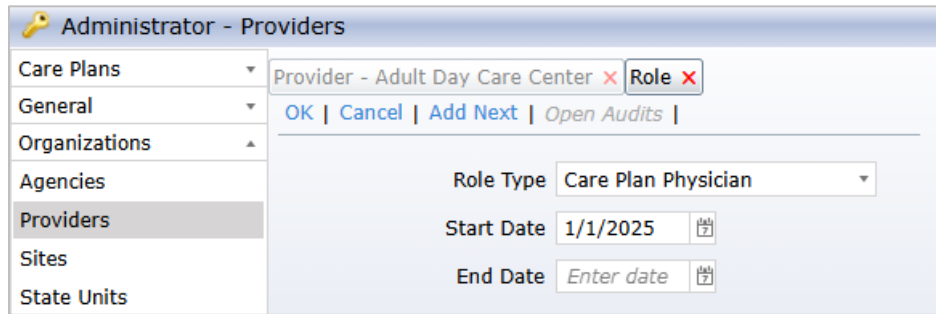
Provider Type Senior Center

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**.

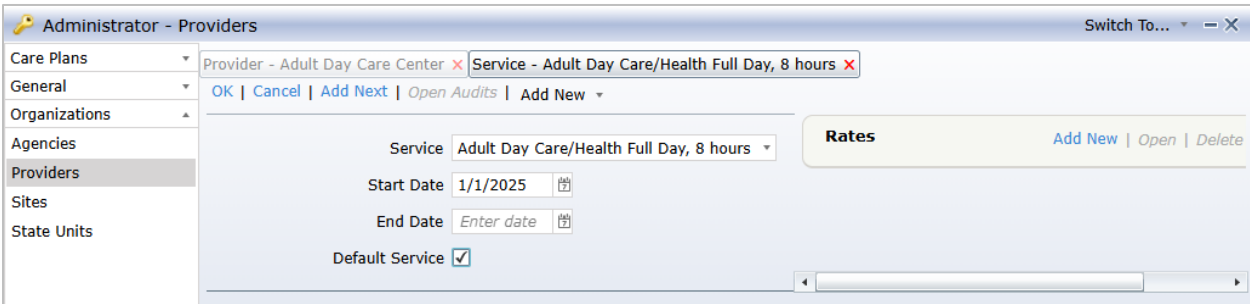


The screenshot shows the 'Administrator - Providers' window. On the left is a navigation menu with options: Care Plans, General, Organizations, Agencies, Providers (selected), Sites, and State Units. The main area displays the configuration for a provider named 'Provider - Adult Day Care Center'. At the top, there are buttons for 'OK', 'Cancel', 'Add Next', and 'Open Audits'. Below these, the 'Role Type' is set to 'Care Plan Physician' in a dropdown menu. The 'Start Date' is set to '1/1/2025' with a calendar icon. The 'End Date' is set to 'Enter date' with a calendar icon.

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.



Administrator - Providers Switch To... - X

Care Plans ▾ Provider - Adult Day Care Center X Service - Adult Day Care/Health Full Day, 8 hours X

General ▾ [OK](#) | [Cancel](#) | [Add Next](#) | [Open Audits](#) | [Add New](#) ▾

Organizations ▴

Agencies

Providers

Sites

State Units

Service: Adult Day Care/Health Full Day, 8 hours ▾

Start Date: 1/1/2025 📅

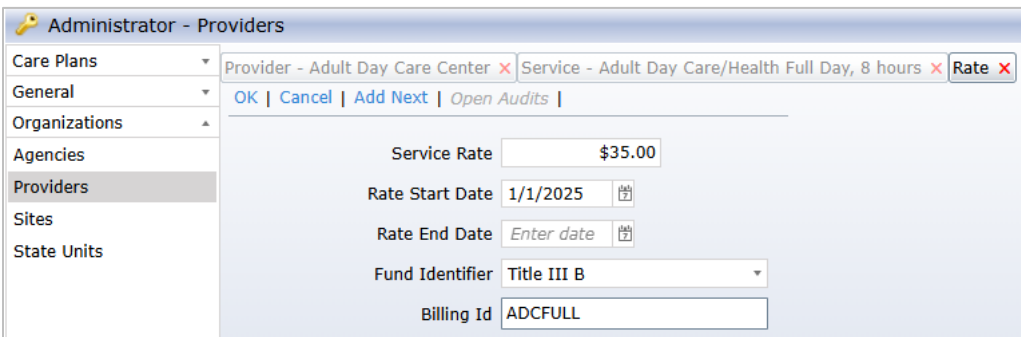
End Date: Enter date 📅

Default Service: ☒

Rates [Add New](#) | [Open](#) | [Delete](#)

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.



Administrator - Providers

Care Plans ▾ Provider - Adult Day Care Center X Service - Adult Day Care/Health Full Day, 8 hours X **Rate** X

General ▾ [OK](#) | [Cancel](#) | [Add Next](#) | [Open Audits](#) |

Organizations ▴

Agencies

Providers

Sites

State Units

Service Rate:

Rate Start Date: 1/1/2025 📅

Rate End Date: Enter date 📅

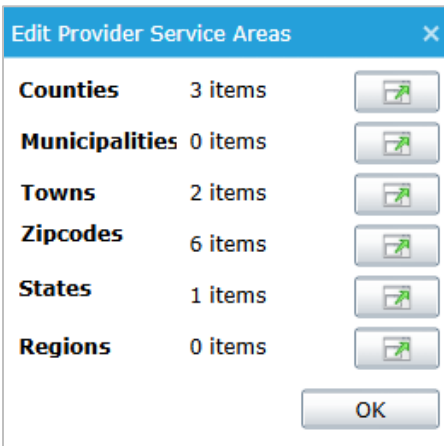
Fund Identifier: Title III B ▾

Billing Id:

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**.



Edit Provider Service Areas [X]

Counties	3 items	[Add]
Municipalities	0 items	[Add]
Towns	2 items	[Add]
Zipcodes	6 items	[Add]
States	1 items	[Add]
Regions	0 items	[Add]

[OK]

- 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.

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



Short Description [ABC]

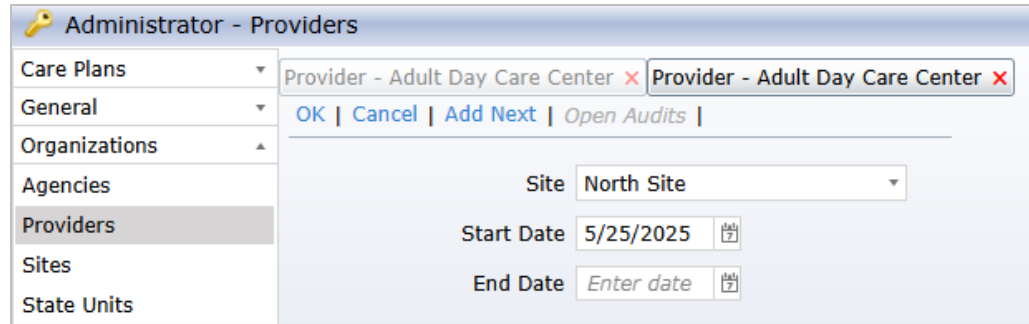
Provides adult day services to men and women over 65

- Click **Save** or **Save and Close**.

Site

A provider can offer services at more than one site.

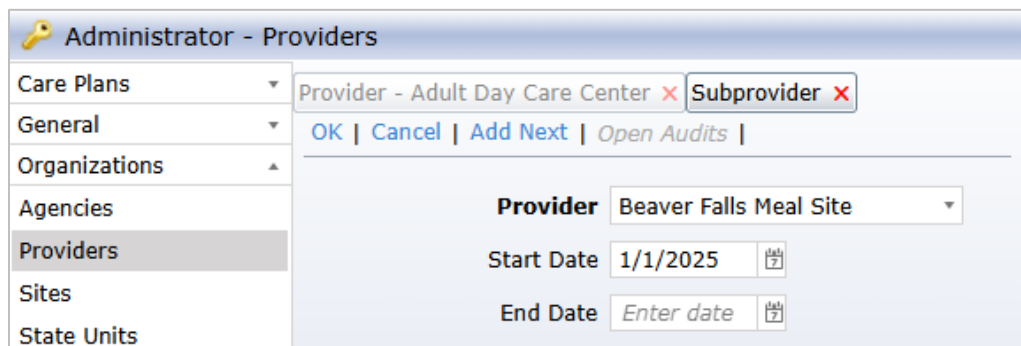
- With the provider record open, click **Add New** and select **Site**.
- Select the site and add a **Start Date** if known.
- Click **Add Next** to add another rate or click **OK** to finish.



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.

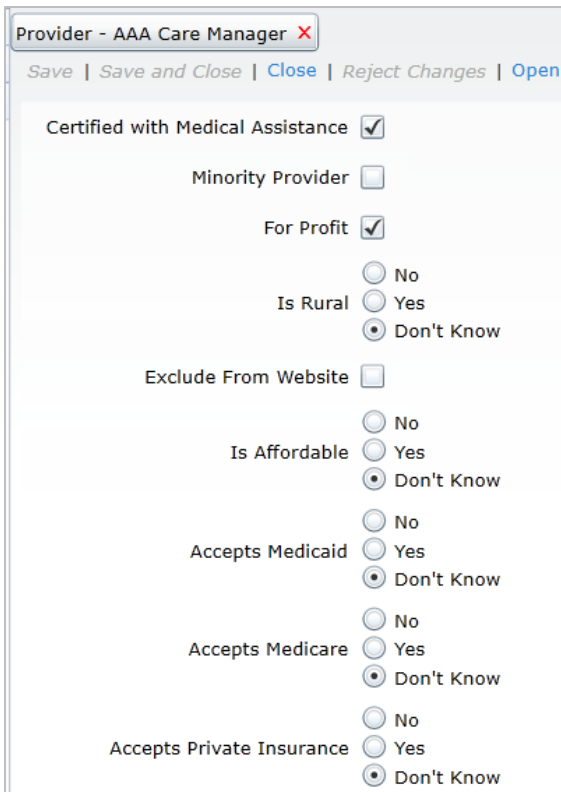


Provider details

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.



Provider - AAA Care Manager X

Save | Save and Close | Close | Reject Changes | Open

Certified with Medical Assistance ☒

Minority Provider ☐

For Profit ☒

Is Rural ☐ No
☐ Yes
☒ Don't Know

Exclude From Website ☐

Is Affordable ☐ No
☐ Yes
☒ Don't Know

Accepts Medicaid ☐ No
☐ Yes
☒ Don't Know

Accepts Medicare ☐ No
☐ Yes
☒ Don't Know

Accepts Private Insurance ☐ No
☐ Yes
☒ Don't Know

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**.

Provider - AAA Care Manager ✕

[Save](#) | [Save and Close](#) | [Close](#) | [Reject Changes](#) | [Open](#)

	☒ No
Open Always	☐ Yes
	☐ Don't Know
	☒ No
Open Sunday	☐ Yes
	☐ Don't Know
	☒ No
Open Monday	☐ Yes
	☐ Don't Know
	☐ No
Open Tuesday	☒ Yes
	☐ Don't Know
	☐ No
Open Wednesday	☒ Yes
	☐ Don't Know
	☐ No
Open Thursday	☒ Yes
	☐ Don't Know
	☐ No
Open Friday	☒ Yes
	☐ Don't Know
	☐ No
Open Saturday	☒ Yes
	☐ Don't Know

Hours of operation

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

☒ No
☐ Yes
☐ Don't Know

Open Saturday

Sunday From

Sunday To

Monday From

Monday To

Tuesday From

Tuesday To

Wednesday From

Wednesday To

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