



WellSky[®] Hospice and Palliative

Release Notes - Current

Software Version: 5.132.0

Last Update: November 23, 2021

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Document Revision History

Last Update	Release Date	Release Version	Revision Description
September 29, 2021	September 29, 2021	5.127.0	Release notes v3 – Information was added about a new filter option in the Payroll Report .
September 29, 2021	October 13, 2021	5.128.0	Release notes v1
October 5, 2021	October 13, 2021	5.128.0	Release notes v2 – Updated release date for the new Encounter Charting features .
October 7, 2021	October 13, 2021	5.128.0	Release notes v3 – Added information about faxing/printing a shorter medication list. Updated release date for the new Encounter Charting features .
October 13, 2021	October 13, 2021	5.128.0	Release notes v4 – Updated the Encounter Charting features section.
October 13, 2021	October 27, 2021	5.129.0	Release notes v1
October 28, 2021	November 10, 2021	5.130.0	Release notes v1
November 4, 2021	November 10, 2021	5.130.0	Release notes v2 – The Referral Manager updates will not be released at this time. Added information about a new internal report .
November 10, 2021	November 10, 2021	5.130.0	Release notes v3 – The expected downtime was updated.
November 10, 2021	November 23, 2021	5.131.0	Release notes v1
November 11, 2021	November 23, 2021	5.131.0	Release notes v2 – Added information about new permissions in the Clinical Reports category.
November 12, 2021	November 23, 2021	5.131.0	Release notes v3 – Added more information about the Reconciliation Dashboard filters.
November 18, 2021	November 23, 2021	5.131.0	Release notes v4 – Added more information about the Palliative Social Worker Provider Billing feature.
November 22, 2021	November 23, 2021	5.131.0	Release notes v5 – Added information about an update to the AR Rollforward report.
November 23, 2021	December 8, 2021	5.132.0	Release notes v1

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New Features and Enhancements 12.8.21

Release 5.132.0

These updates will be released to your production site on 12.8.21 unless otherwise noted. They will be released on your staging site on the evening of 11.23.21.

There is no expected downtime.

Optimized Charting Retirement – 4.13.22

Optimized Charting will retire on April 13, 2022. All agencies will transition to Advanced Encounter Charting.

Education

- There are several webinars planned.
- The first webinar is Thursday, December 9, 2021 from 3:00 p.m. – 4:00 p.m. ET [Register](#)
- Additional webinar dates:
 - Wednesday, January 12, 2022, from 3:00 p.m. – 4:00 p.m. ET
 - Tuesday, February 22, 2022, from 2:00 p.m. – 3:00 p.m. ET
 - Tuesday, March 29, 2022 from 2:00 p.m. – 3:00 p.m. ET
- After you log in, look for information at the top of the screen, then click a link to register for one.

Documentation

Encounter Charting documentation is being updated. For now, you can view existing documentation by going to **Help > Reference documents >** (search for) *Encounter Charting* and *Encounter Types - Advanced*.

Agency Action Required – Before or After a Webinar

All agencies have Advanced Encounter Charting enabled on their staging and production sites. To ensure users can access it, complete these steps in your staging site (before or after the webinar depending on how quickly you want to begin practicing using Encounter Charting). When ready, repeat these steps on your production site.

1. Create Advanced Encounter Types
 - a. Ensure you have Encounter Charting selected in your [user profile](#).
 - b. On the top navigation bar, click **Agency > Encounter Type**.
 - c. Go to the Advanced Encounter Types section and click **CREATE ADVANCED ENCOUNTER TYPE**.

- d. Review the *Encounter Types - Advanced* [document](#) to complete the remaining steps.
2. Enable Encounter Charting for each user
 - a. On the top navigation bar, click **Admin > Users**.
 - b. On the left, click the  icon to edit the user's profile.
 - c. In the **Add-On Modules** section, select the **Use Encounter Charting** option.
 - d. At the end of the page, click **Update**.

If you have questions, contact support@consoloservices.com.

Preview of Enterprise Referral Manager Features

Referral Manager is now Enterprise Referral Manager. It includes a new referral tracking screen, the option to automatically receive referrals from post-acute care providers, and several new features. Additional information and webinar opportunities will be posted in the coming weeks.

Referral Inbox

The Intake Queue was replaced by the Referral Inbox. You can manage referrals from this screen.

Date Received	Patient Name	Patient DOB	Source	Sender	Expected Service	Status	Referral Details	Actions
11/16/2021 01:45 PM	Hogg Gillian	11/2/1993	CarePort	Interface Test Hospital	—	Created	Referral Sender Docs	⋮
11/16/2021 12:21 PM	Hogg Gillian	11/2/1993	CarePort	Interface Test Hospital	—	Created	Referral Sender Docs	⋮
11/16/2021 11:40 AM	Hogg Gillian	11/2/1993	CarePort	Interface Test Hospital	—	Created	Referral Sender Docs	⋮

CarePort Integration and Notifications

With a CarePort subscription, your agency automatically receives referrals from post-acute care providers in real-time. These referrals flow to the Referral Inbox where you can respond to the referral source. With CarePort integration, you also receive notifications when a referral source updates the referral.

Additional Physician and Provider Tracking

When entering a patient's referral information, you can add two additional providers if needed. Once the referral is saved, the information flows to the patient's WellSky Hospice and Palliative Electronic Health Record (EHR).

Ross, Micheal - ACME Hospice Hospice General History

Referral Information

Referral Account	Referral Contact	Community Liaison
Referring Physician	Primary Care Physician	Additional Provider 1
Additional Provider 2	Team	Office

Advance Directive Tracking

Add the patient's care directive information to their referral. Once the referral is saved, the information flows to the patient's WellSky Hospice and Palliative EHR.

The screenshot shows a web interface for a patient named Kelsey Martinez. The page title is "Patient Care Directives". Below the title, there are several input fields and checkboxes:

- Code Status**: A dropdown menu.
- Code Status Note**: A text input field.
- Disaster Acuity**: A dropdown menu.
- Living Will**: A checkbox.
- Disaster Priority Tree**: A text input field.
- Durable Power of Attorney**: A checkbox.
- Designated Surrogate**: A checkbox.

Add Patient Record Defaults Within a Care Level

When creating or editing a care level, you can now enter **Patient Record Defaults** in the **Defaults** tab on the Care Level screen. Information entered here flows to the Patient Record Defaults section of the patient's Assignments & Defaults.

General Care Level Change Details (New Admission)

Effective Datetime 11/22/2021 11:02 <small>This field is required.</small>	New Level Of Care 0651-Routine Home Care <small>This field is required.</small>	Office Abshire Group <small>This field is required.</small>
---	--	--

Transfer | **Location** | **Defaults**

Patient Default Effective Date <input type="text"/>	Patient Default Medical Record No <input type="text"/>	Patient Default Auto Generate Mrn <input type="text"/>	Patient Default Team <input type="text"/>
---	--	--	---

Create

If Patient Record Defaults were previously entered, either in a care level or Assignments & Defaults, that information automatically populates in the appropriate fields in the Defaults tab when editing the care level.



NOTE – The defaults display when you edit a new referral only. These fields are not part of the New Referral entry screen.

Morse Fall and Skin Integrity (Braden) Assessments – Scores Automatically Calculate

As you enter information in a Morse Fall or Skin Integrity (Braden) assessment, a score automatically calculates in the lower-left corner. In these examples, two items have been addressed and the corresponding score has started to calculate. As additional items are addressed, the score automatically adjusts.

Morse Fall

Morse Fall Assessment General Details

Ambulatory Aid - Crutches/Cane/Walker ⊗ ★ ★ ☆	Gait/Transferring - Weak ⊗ ★ ★ ☆	Mental Status - ⊗ ☆ ☆
<input type="checkbox"/> History of Falling	<input type="checkbox"/> Secondary Diagnosis	<input type="checkbox"/> IV/Heparin Lock

Total Score
25

Skin Integrity (Braden)

Skin Integrity Assessment General Details

Sensory Perception - Very Limited ⊗ ★ ★ ☆ ☆	Moisture - Moist ⊗ ★ ★ ☆ ☆	Activity - Chairfast ⊗ ★ ★ ☆ ☆
Mobility - ⊗ ☆ ☆ ☆ ☆	Nutrition - ⊗ ☆ ☆ ☆ ☆	Friction and Shear - ⊗ ☆ ☆ ☆

Total Score
6

Aide Charting – Acknowledge or Complete Tasks to Sync

In Encounter Charting, aide charts that include Visit Task Lists cannot be synced unless all tasks are either acknowledged or completed.

New Features and Enhancements 11.23.21

Release 5.131.0 v5

These updates will be released to your production site on 11.23.21 unless otherwise noted. They will be released on your staging site on the evening of 11.10.21.

There is no expected downtime.

Palliative Social Worker Provider Billing

To allow palliative billing for social workers who have their own NPI, there is now a *Social Worker* option in the Physician/Provider profile.



NOTE – The billing portion of this update is in progress. Look for updates about the completion of this feature in future release notes.

To activate this option for a social worker, complete these steps.

1. From the top navigation bar, click **Services > Physicians/Providers**.
2. On the top navigation bar, click **Related Links > Create a new Physician/Provider**.
3. Enter the required information (blue fields) as you normally would for a new provider.
4. In the General Physician/Provider Details section, select the **Social Worker** option.

The screenshot shows a web form titled "Create a new Physician/Provider" under the "Physicians/Providers" section. The form is divided into a "General Physician/Provider Details" section. Fields include: First Name (required), Middle Name, Last Name (required), DOB, Gender, Race, Physician Assistant?, Social Worker?, and Supervising Physician. The "Social Worker?" checkbox is highlighted with a red border.

- To bill for social work services, go to the Physician/Provider Credentials section, then enter an NPI number in the **NPI Number** field.



NOTE – The NPI Number field is normally a required field. At this time, when you select the *Social Worker* option in the General Physician/Provider Details section, the *NPI Number* field changes to a non-required field and is no longer blue. However, if you intend to bill for social work services, you must enter an NPI number.

- Enter information in other fields per your agency policy.
- Click **Create**.



NOTE – The billing portion of this update is in progress. Look for updates about the completion of this feature in future release notes.

For information about entering providers, click **Help > References documents >** (search for) *Physician and Provider Setup*.

Reconciliation Updates

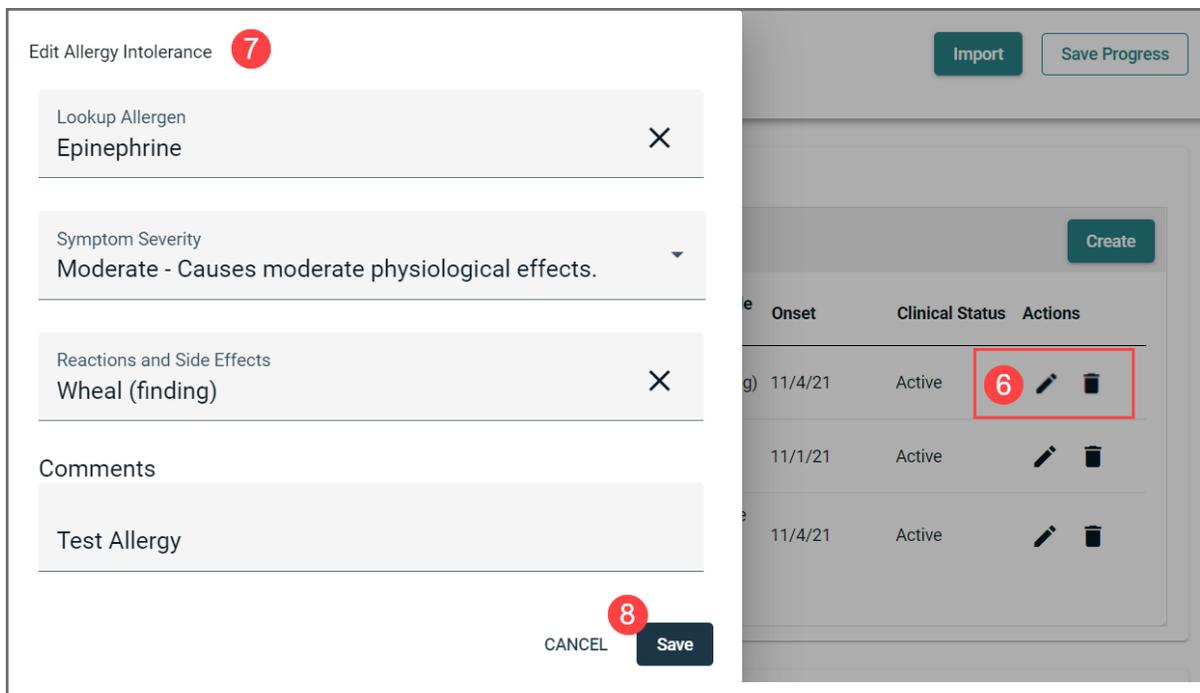
Allergies, problems, and medications can be imported from the CCDA file into the patient's medical record.

During the import process, the patient's existing medications, allergies, and problems are displayed and can be edited or deleted or new items can be added.

Allergies

When importing CCDA information, you can edit the patient's allergies from the import screen.

1. Go to the **Allergies** section.
2. On the right, locate the allergy in the **Existing Allergen Data in Consolo** table.
3. On the right, click the  icon.
4. Make changes on the **Edit Allergy Intolerance** screen.
5. Click **Save**.



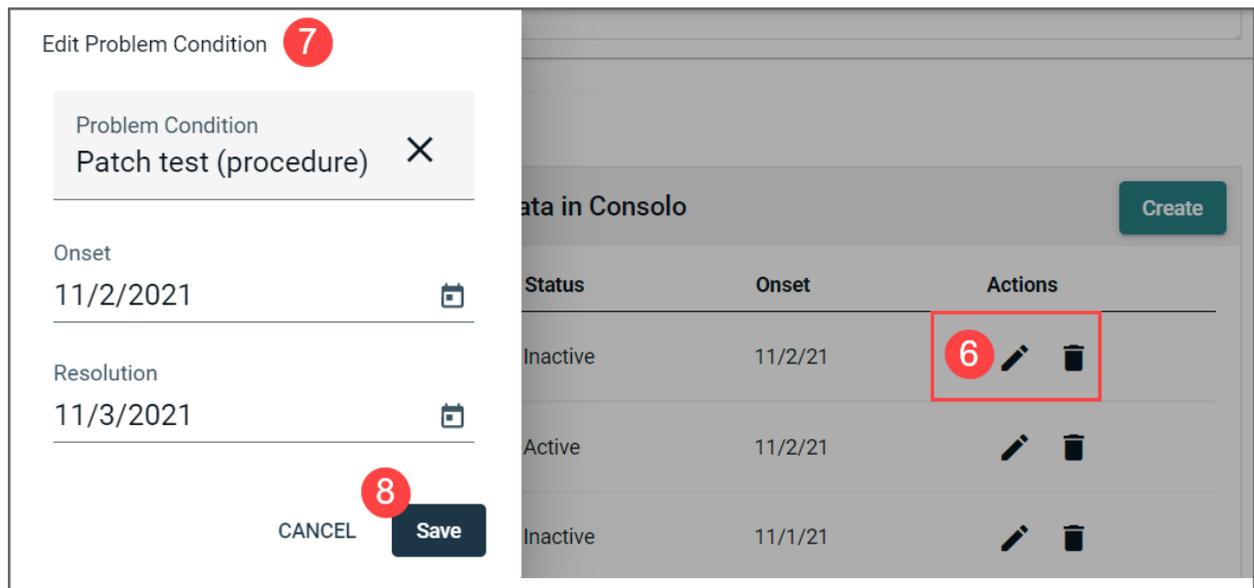
If needed, you can add an allergy to the patient's medical record from the import screen.

1. Go to the **Allergies** section.
2. Go to the **Existing Allergen Data in Consolo** table header and click **Create**.
3. Enter the allergy information on the **Create Allergy Intolerance** screen.
4. Click **Create**.

Problems

When importing CCDA information, you can edit the patient's problems from the import screen.

1. Go to the **Problems** section.
2. On the right, locate the problem in the **Existing Problem Data in Consolo** table.
3. On the right, click the  icon.
4. Make changes on the **Edit Problem Condition** screen.
5. Click **Save**.



The screenshot shows the 'Edit Problem Condition' dialog box overlaid on the 'Existing Problem Data in Consolo' table. The dialog box contains the following information:

- Problem Condition:** Patch test (procedure)
- Onset:** 11/2/2021
- Resolution:** 11/3/2021
- Buttons:** CANCEL and Save

The table in the background has the following structure:

Status	Onset	Actions
Inactive	11/2/21	 
Active	11/2/21	 
Inactive	11/1/21	 

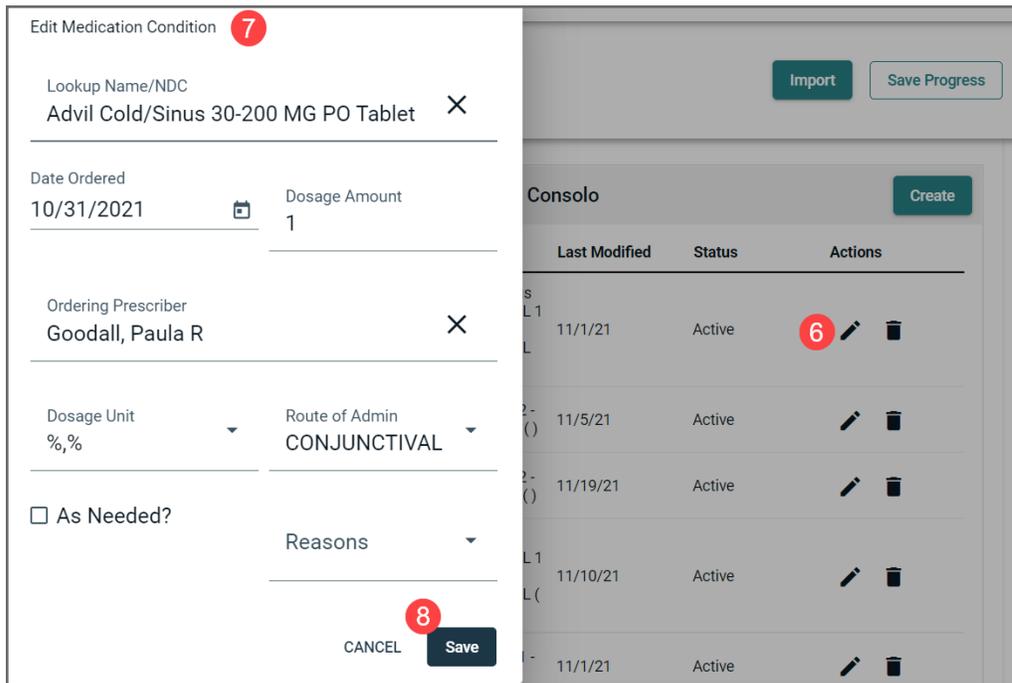
If needed, you can add a problem to the patient's medical record from the import screen.

1. Go to the **Problems** section.
2. Go to the **Existing Problem Data in Consolo** table header and click **Create**.
3. Enter the problem on the **Create Problem Condition** screen.
4. Click **Create**.

Medications

When importing CCDA information, you can edit the patient's medications from the import screen.

1. Go to the **Medications** section.
2. On the right, locate the medication in the **Existing Medication Data in Consolo** table.
3. On the right, click the  icon.
4. Make changes on the **Edit Medication Condition** screen.
5. Click **Save**.



The screenshot shows the 'Edit Medication Condition' dialog box with the following fields and values:

- Lookup Name/NDC: Advil Cold/Sinus 30-200 MG PO Tablet
- Date Ordered: 10/31/2021
- Dosage Amount: 1
- Ordering Prescriber: Goodall, Paula R
- Dosage Unit: %,%
- Route of Admin: CONJUNCTIVAL
- As Needed?:
- Reasons: (empty dropdown)

The background shows the 'Existing Medication Data in Consolo' table with columns: Last Modified, Status, and Actions. A red circle with the number 6 is next to the pencil icon in the Actions column for the first row.

If needed, you can add a medication to the patient's medical record from the import screen.

1. Go to the **Medications** section.
2. Go to the **Existing Medication Data in Consolo** table header and click **Create**.
3. Enter the medication on the **Create Medication Condition** screen.
4. Click **Create**.

Dashboard Updates

The Reconciliation Dashboard and associated screens were updated to include the new color scheme and layout. The **Status Filters** were moved from the top of the page to the top of the table. In this example, the ALL option is selected so all statuses are displayed in the **Status** column. Also, each status in this column is now associated with a color.

Reconciliation Dashboard

Filters: Date Imported, Patient Name, User Name, Source, Clear Filters, Upload CCDA (Max File Size: 20MB)

Patient Name	Imported By	Date Imported	Physician	Office	Status	Patient Status	Source	Actions
Isabella Jones	Kleinheksel, Charles	11/2/21, 10:16 AM	-	-	New	-	Upload	⋮
No Associated Patient	Kleinheksel, Charles	11/2/21, 10:16 AM	-	-	New	-	Upload	⋮
No Associated Patient	Kleinheksel, Charles	11/2/21, 10:16 AM	-	-	New	-	Upload	⋮
Isabella Jones	Mabry, Joshua	10/27/21, 12:21 PM	-	PC Tin B	In Progress	New	Upload	⋮
Isabella Jones	Mabry, Joshua	10/27/21, 12:20 PM	-	-	In Progress	Transitioned	Upload	⋮
Isabella Jones	Kasturi, Santhosh	10/18/21, 4:35 PM	Abbott, Ying	PC Tin A	Completed	Transitioned	Upload	⋮
Isabella Jones	Kasturi, Santhosh	10/18/21, 2:52 PM	-	PC Tin A	In Progress	Transitioned	Upload	⋮
No Associated Patient	Automation, Home	10/16/21, 3:13 AM	-	PC Tin B	New	Referred	Upload	⋮
No Associated Patient	Automation, Home	10/16/21, 3:07 AM	-	PC Tin B	New	Existing	Upload	⋮

Items per page: 20 | 1 - 20 of 234

No Patient Match Found

This screen now displays the updated color scheme and layout.

No Patient Match Found

No matches for the patient associated with this CCDA have been found.

At this time, the system does not support importing CCDAs for new patients. We recommend you enter the patient into the system manually and try reconciling the contents again.

OKAY

Authorized Representative – New Option in Patient Information

You can now select an authorized representative from the patient's home page under **Referral Info > Personal Information**  icon. Select an option from the **Authorized Representative** drop-down list.

Authorized Representative

Authorized Representative



NOTE – The options available here flow from the patient's contacts/family members. If an authorized representative is selected here, it will display on the face sheet.

Cover Sheet Updates

When faxing or creating a PDF, you will see a new option called **Include Cover Sheet**.

PDF Options

Include Signature Page? Include Footer Signature Lines?

Include Cover Sheet

When sending a fax, a cover sheet is automatically included, even if you clear the check mark.

For PDFs, you can print just a cover sheet, or add a cover sheet to any PDF.

To print just the cover sheet, complete these steps.

1. From the patient's home page, click **Documents > Fax/Print Patient Documents**.
2. In the PDF Options section, select **Include Cover Sheet**.
3. In the lower right, click the  icon.
4. Open the PDF from **Notifications** in the lower-right corner.

New Permissions – Clinical Reports

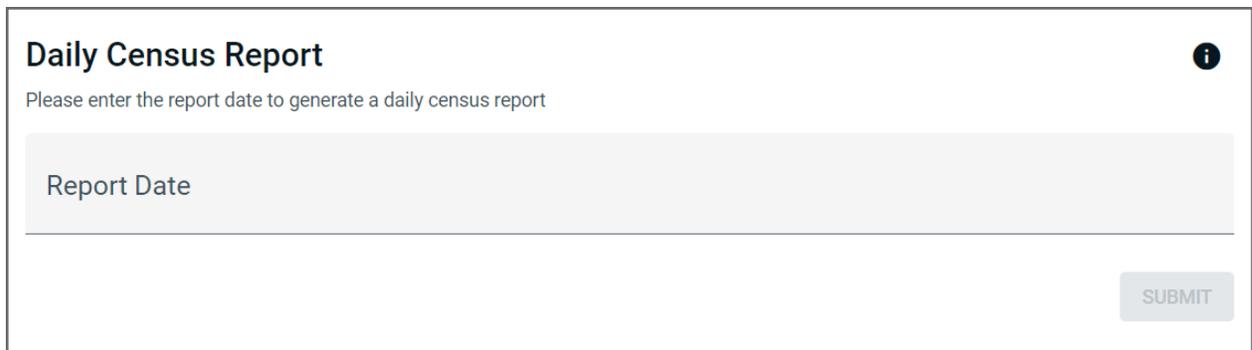
Two reports were moved from Referral Manager to your WellSky Hospice and Palliative core-site. To use these reports, add these permissions, found in the Clinical Reports category, to the appropriate roles.

- Daily Census Report
- Visit Frequency Snapshot

Daily Census Report

This report provides a detailed snapshot of all incoming and outgoing patient activity affecting the census. To use this report, complete these steps.

1. On the top navigation bar, click **Admin > Reports**.
2. Select **Daily Census Report**.
3. On the Daily Census Report screen, place your cursor in the **Report Date** field, then select a date from the calendar.



Daily Census Report 

Please enter the report date to generate a daily census report

Report Date

SUBMIT



TIP – If needed, click the  icon to open a fly-out with information about the report.

4. Click **SUBMIT**.
5. A message displays that the report has been submitted and you will receive a notification when it is done.

- When the report is ready, open it from **Notifications** in the lower-right corner.

Reports > Daily Census Report > 11/11/2021 Report

Daily Census Report for 11/11/2021 [EXPORT DATA](#)

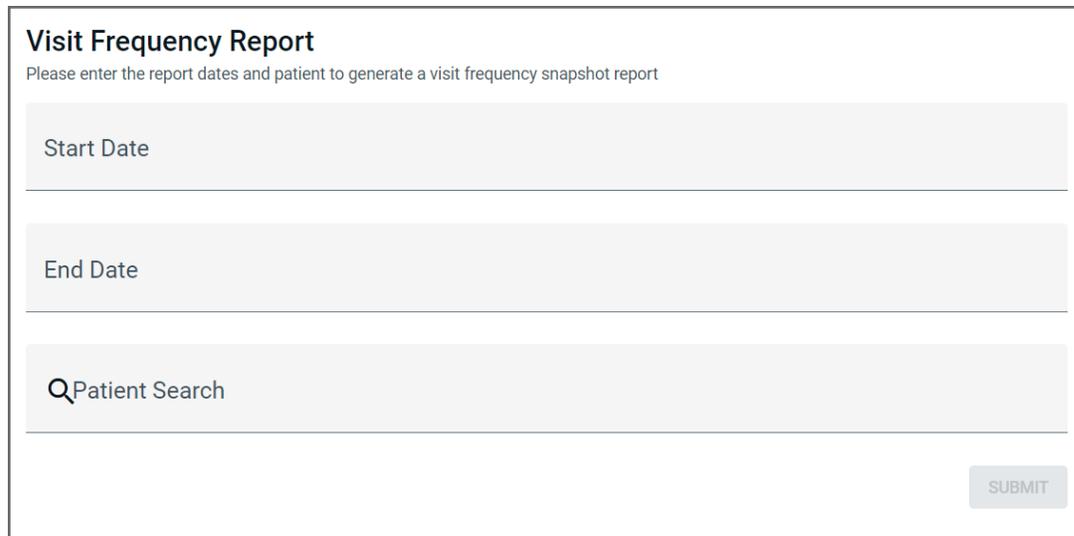
Office	Area	Region	Beginning Census	New Admissions	Re-Admissions	Deaths	Live Discharges	Interoffice Transfer Out	Interoffice Transfer In	Revocation	Ending Census	Pending Referrals	New Referrals
Jakubow...	Oregon	Northwest	1	0	0	0	0	0	0	0	1	2	1
VonRued...	Michigan/Ohio	Midwest	212	0	0	0	0	0	0	0	212	221	212
Nienow	Oregon	Northwest	1	0	0	0	0	0	0	0	1	1	1

- If needed, click a column header to sort the table.
- To export the data to a CSV file, click **EXPORT DATA** in the upper right.

Visit Frequency Snapshot

This report provides a summary snapshot of a patient's care. To use this report, complete these steps.

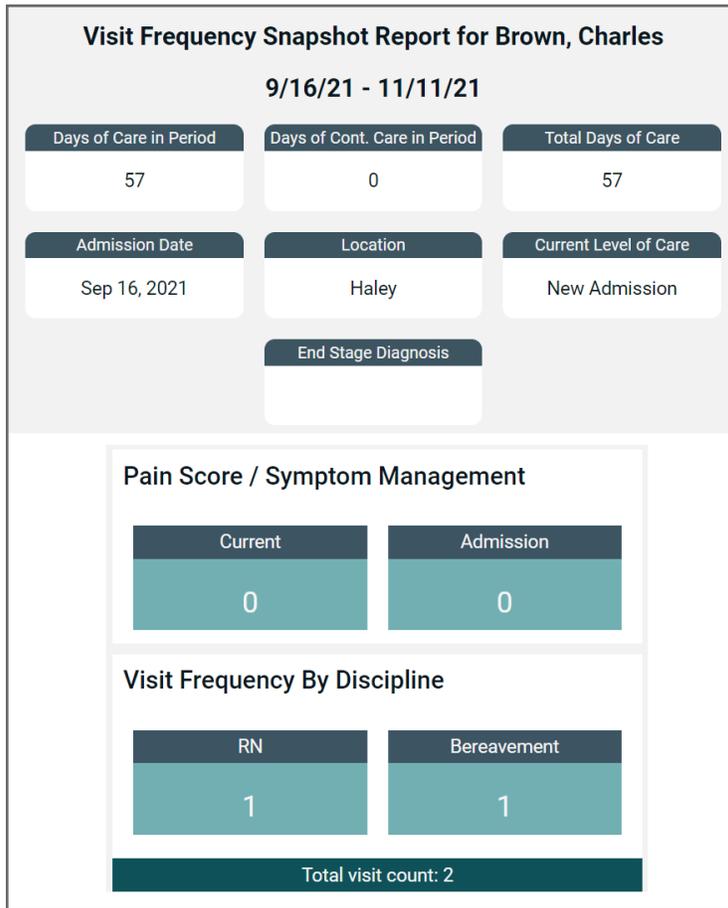
1. On the top navigation bar, click **Admin > Reports**.
2. Select **Visit Frequency Snapshot**.
3. On the Visit Frequency Report screen, place your cursor in the **Start Date** field, then select a date from the calendar.



The screenshot shows a web form titled "Visit Frequency Report". Below the title is a subtitle: "Please enter the report dates and patient to generate a visit frequency snapshot report". The form contains three input fields: "Start Date", "End Date", and "Patient Search" (with a magnifying glass icon). A "SUBMIT" button is located in the bottom right corner of the form.

4. Place your cursor in the **End Date** field, then select a date from the calendar.
5. In the **Patient Search** field, begin typing a patient's name, then select an option from the list.
6. Click **SUBMIT**.
7. A message displays that the report has been submitted and you will receive a notification when it is done.

8. When the report is ready, open it from **Notifications** in the lower-right corner.



AR Rollforward Report Update

When a month is closed, then the AR Rollforward report is run for the closed month, all closed claims within that closed month will surface in the Revenue column, totaled by patient.

New Features and Enhancements 11.10.21

Release 5.130.0 v3

These updates will be released to your production site on 11.10.21 unless otherwise noted. They will be released on your staging site on the evening of 10.28.21 and will be available for review after that.

There is no expected downtime.

New Report for WellSky Internal Use Only

The AR Revenue Reconciliation Report was created for internal use by WellSky staff only. Please disregard the permission related to it in the Financial Reports category. If you attempt to add this permission, then access the report, you will receive a message that states you are unauthorized to use this report.

Referral Manager – Additional Provider Fields Added – To be released at a later date

When entering a patient's referral information from the patient's page, you can add two additional providers if needed. Begin typing a name, then select an option from the list.

Ross, Micheal - ACME Hospice Hospice General History

Referral Information

Referral Account	Referral Contact	Community Liaison
Referring Physician	Primary Care Physician	Additional Provider 1
Additional Provider 2	Team	Office

Physician/Provider User Order Functionality

When discontinuing a current medication from the **Medication Record** > ⋮ > **Discontinue**, the order will default to the name of the physician/provider user initiating the discontinuance process instead of to the initial ordering provider for the medication.

Bereavement Letter Template Updates

The Bereavement Letter Templates screen and Bereavement Letter Template entry screen were updated to include the new color scheme and layout. Any existing templates and included information will automatically display in the new layouts.

New Display

From the top navigation bar, click **Agency > Bereavement Letters** to view the updated page.

Name	Body	From	Created Date	Actions
2	Integer pulvinar enim felis, nec egestas ipsum ultrices nec. Donec tincidunt, nib...	null	07/26/2021	
July	Integer pulvinar enim felis, nec egestas ipsum ultrices nec. Donec tincidunt, nib...	null	07/22/2021	

- Any previously created templates display on the new page.
- In the upper-right corner, click [ADD NEW TEMPLATE](#) to create a new bereavement letter template.
- On the right, click an icon to complete an action.
 - – View the letter template
 - – Edit the letter template
 - – Delete the letter template

NOTE – The and icons open the same screen display as the [ADD NEW TEMPLATE](#) option. The name of the screen and options available at the end of the screen depend on the option you selected (view, edit, or add a new template).

New Template Creator

To create a new bereavement letter template, complete the following steps.

1. From the top navigation bar, click **Agency > Bereavement Letters**.
2. In the upper-right corner, click the **ADD NEW TEMPLATE** button to open the New Bereavement Letter Template screen. The screen display was updated but the information you enter is the same.

New Bereavement Letter Template

Template Name 3

Letter Details 4

Salutation a

Letter Body

Paragraph b

Closing c

From Information

Paragraph d

Options 5

Use Survivor's Title

Use Survivor's First Name

Use Survivor's Address

6

CANCEL SUBMIT

3. In the **Template Name** field, enter the name of the template.
4. In the **Letter Details** section enter the following information:
 - a. Enter information in the **Salutation** field.
 - b. Enter information in the **Letter Body** box. If needed, you can copy and paste information. You can also use the new formatting tools such as bold, italics, lists, and so on.

- c. Enter information in the **Closing** field.
 - d. Enter the body of the letter in the **From** box. If needed, you can copy and paste information. You can also use the new formatting tools such as bold, italics, lists, and so on.
5. If needed, select one or more items in the **Options** section.
6. When done, click **SUBMIT** in the lower-right corner to save the template.

 **NOTE** – If you click **Cancel**, you return to the Bereavement Letter Template screen.

7. Print letters from the Bereavement Contact Summary report as you currently do.

 **TIP** – If needed, edit your agency's existing templates to utilize the new formatting options in the *Letter Body* and *From* sections of the template.

Bereavement Letter PDF – Updated Look

Bereavement letter PDFs created via the Bereavement Contact Summary report have a new look.

October 26, 2021

Dear Joan,

Integer pulvinar enim felis, nec egestas ipsum ultrices nec. Donec tincidunt, nibh sed tincidunt placerat, nisi lacus efficitur mauris, vel venenatis erat tellus non nunc. Phasellus nec dignissim augue, ac consequat ipsum. Quisque porttitor, purus id posuere eleifend, odio mauris elementum enim, quis sollicitudin dui sem ut mi. Sed eget laoreet magna. In tristique nulla odio, id sodales diam pharetra nec. Nam vel turpis non massa luctus facilisis eget vel elit. Curabitur dictum mi sed est pretium ullamcorper. Nullam sed ligula orci. Donec condimentum eleifend fringilla. Fusce eget consequat neque, at consequat sapien. Etiam interdum convallis eros. Morbi accumsan urna sed cursus consectetur. Fusce ac augue faucibus erat venenatis commodo. In fringilla ligula et purus rhoncus egestas. Quisque felis nulla, scelerisque at velit eget, interdum convallis sapien. Donec quis orci porta sapien dignissim molestie in ullamcorper eros. Phasellus vestibulum, tortor non tincidunt pellentesque, purus neque varius nisi, sit amet iaculis dui justo ac ipsum.

Sincerely,

Jane Smith
Bereavement Coordinator

New Features and Enhancements 10.27.21

Release 5.129.0 v1

At this time, there are no client-facing updates to report for the 10.27.21 release.

There will still be an expected downtime of one hour for other maintenance needs. During the release, you will not be able to log in to WellSky Hospice and Palliative. Please note the updates may not require the entire amount of time.

New Features and Enhancements 10.13.21

Release 5.128.0 v4

These updates will be released to your production site on 10.13.21 unless otherwise noted. They are currently on your staging site for review.

The expected downtime is one hour. During the release, you will not be able to log in to WellSky Hospice and Palliative. Please note the updates may not require the entire amount of time.

Medication List Enhancement for Faxing and Printing

You can now print a shorter list of medications from either the Medication Record or the Fax/Print Patient Documents page.

Medication Record

To print from the Medication Record, click one of the print options on the top left.

The screenshot shows a navigation bar with 'DASHBOARD > TESTING, EMAR > MEDICATION RECORD'. Below it are four tabs: 'PRINT FULL', 'PRINT SHORT', 'DRUG INTERACTIONS/ADVERSE EFFECTS', and 'PATIENT EDUCATION DETAILS'. The 'PRINT FULL' and 'PRINT SHORT' tabs are highlighted with a red box. Below the tabs is a section titled 'Requires Action' containing a table with columns for Medication, CDS, Dosage, and Status.

Medication	CDS	Dosage	Status
> Ativan 1 MG		1 tab every 4 hours ORAL (1 MG Tablet)	NEEDS PHYSICIAN ORDER
> Benadryl 25 MG		1 tab 4 times a day ORAL (25 MG Capsule)	NEEDS PHYSICIAN ORDER

- **PRINT FULL** – This option continues to print the medications in the current style.

The screenshot shows a 'Pending Medications' section for 'Ativan [1 MG] Tablet (ID: 3683316) - 1 tab every 4 hours ORAL (1 MG Tablet)'. Below this is a table with medication details.

Order Date	06/15/2018	Ordering MD	Pepper, Doctor
Admin By		Coverage	Not Covered
Change	Updated	Updated Date	06/15/2018
Additional Notes	Additional Instructions		

- **PRINT SHORT** – This option prints a shortened list with allergies at the end of the medications list.

Medications			
Patient: Testing, Emar DOB: 2000-06-14 SSN: 6789			
Medication Ativan	Order Date 06/15/2018	Dosing Ativan [1 MG] Tablet	Covered
Instructions 1 tab every 4 hours ORAL		Reasons	
Medication Benadryl	Order Date 06/15/2018	Dosing Benadryl [25 MG] Capsule	Covered
Instructions 1 tab 4 times a day ORAL		Reasons	
Medication FentaNYL	Order Date 06/15/2018	Dosing FentaNYL [100 MCG/HR] Patch 72HR	Covered
Instructions 1 patch of 100 MCG/HR Patch 72HR continuously TRANSDERMAL		Reasons	

Fax or PDF

When faxing or creating a PDF, select the **Include Medications** option, then choose the **Long** or **Short** option. The medication list displays (not shown) for you to select specific medications if needed.

Documents to Send

Patient Information

Include Face Sheet

Include Allergies

Include Problem List

Include Medications

Long Short

- **Long** – This faxes/prints the [full](#) list in the current style.
- **Short** – This faxes/prints a [shorter](#) list that includes allergies.



Important! You must select either the Long or Short option for the medications to display in the fax or PDF.

New Permission – Required Signature on Save

There is a new permission in the Clinical Charts category called *Required Signature on Save*. This permission requires users to sign their chart entries when they sync (save) the chart.

Clinical Charts
<input type="checkbox"/> Addend Clinical Chart
<input type="checkbox"/> Create Clinical Chart
<input type="checkbox"/> Destroy Clinical Chart
<input type="checkbox"/> Recover Clinical Chart
<input type="checkbox"/> Require Signature on Save
<input type="checkbox"/> Update Clinical Chart
<input type="checkbox"/> View Clinical Chart(s)
<input type="checkbox"/> View CodeRyte Report
(select all) (select none)

When a user syncs their chart entry, they can either select CANCEL to leave the chart as a draft or SYNC AND SIGN to apply their signature and save the chart entry to the patient's medical record.

Sync and Sign? <small>One of your roles requires a signature when syncing charts. If you sync this chart now, you will be signing it as well. Signing this chart will lock it and prevent future editing.</small>
CANCEL SYNC AND SIGN



TIP – Agencies can either add this permission to specific roles or create a separate role with this permission only, then add that role as a secondary role to a user's profile.

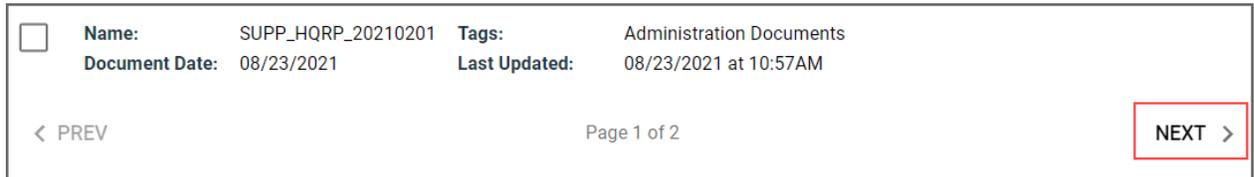


NOTE – If you would like to apply this option to all users in your agency, contact support@consoloservices.com.

Faxing Updates

When faxing, all sections display a maximum of 50 items except the following:

- All physician orders display by default
- If there are more than 50 documents, click the **NEXT>** option



- If there are more than 50 charts, click **LOAD MORE**.



CMS Annual Updates

WellSky Hospice and Palliative has been updated to support the 2021-2022 ICD-10 and Hospice Rates updated by CMS. These will be available and ready to use on October 1, 2021, as expected.

Provider Charges Now Support up to 10 Billable Codes

When entering a physician/provider charge, you can now add nine add-on codes to one charge. The primary billable code is listed first, followed by the nine add-on codes.

1. To enter an additional billable code, click **ADD NEW ADD ON CODE**.

Billable Codes

Place of Service

Code: Enter Physician Charge Code | Amount: | Revenue Code: |

ADD NEW ADD ON CODE

2. Four new fields display for you to enter information.

Code: Enter Physician Charge Code | Amount: | Revenue Code: |

Add On Code: Enter Add On Code | Add On Amount: | Add On Quantity: | Revenue Code: |

ADD NEW ADD ON CODE

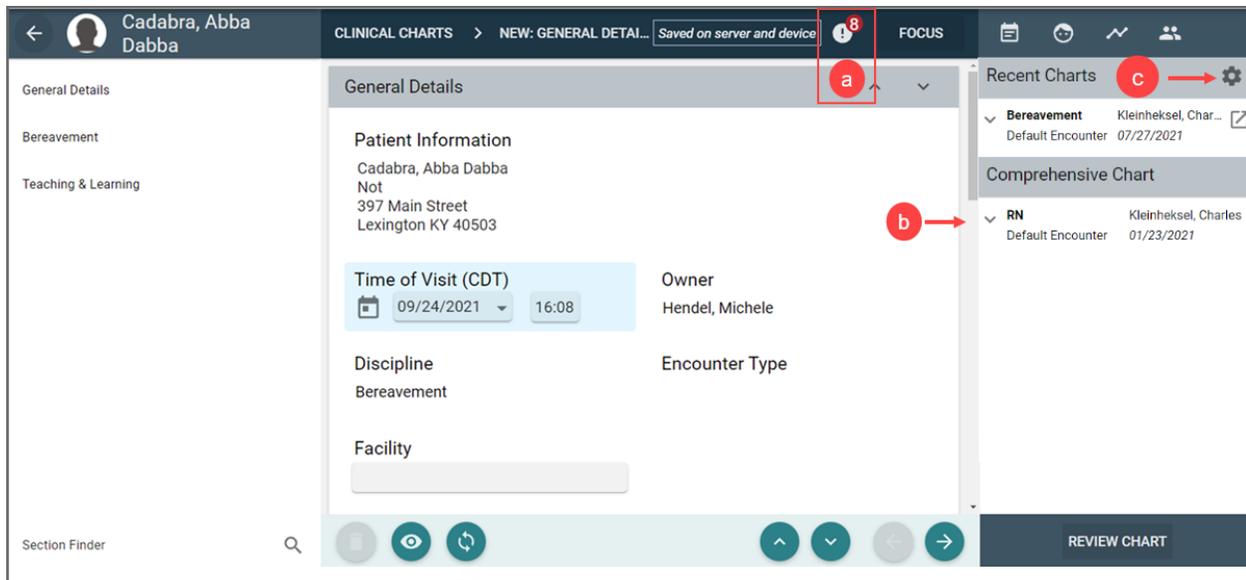
 **NOTE** – If the rate and revenue code are entered in the Billable Code, they automatically populate in the Billable Codes section in the provider charge.

- a. **Add On Code** – Begin typing a code, then select an option from the list.
 - b. **Add On Amount** – Enter an amount in this field (if not already populated from Billable Codes). For example, 57.24. Do not use the \$ sign.
 - c. **Add On Quantity** – Enter a number in the field.
 - d. **Revenue Code** – Place your cursor in the box, then select an option from the drop-down list.
 - e. If needed, click the  icon to permanently delete the fields and any information entered.
3. If needed, repeat this process to add additional billable codes.
 4. Add other information as needed, then click the  icon to save your work.

New Encounter Charting Features – Right Panel

These encounter charting features are on your staging site and will be released to production on 10.13.21 as originally planned.

The Charting  and Patient  tabs on the right panel were updated. Any features outlined here are available to all agencies. Permissions are not required.



Charting Tab

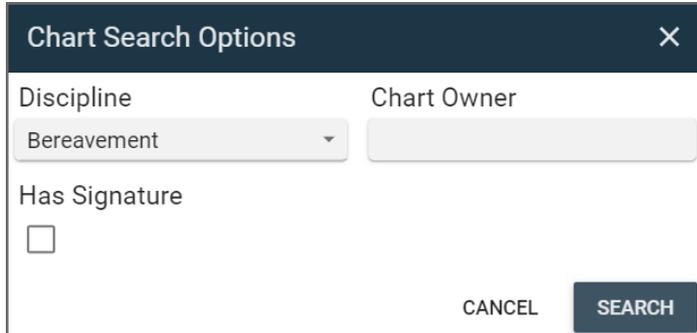
- a. The chart errors and incomplete screens are now an icon at the top of the middle panel. Click the  icon to display the errors. In this example, there are eight errors or incomplete screens.

Chart Errors: 8

01. Clinical chart sections legacy chart taught to ClearValidation: Teaching And Learning Assessment taught to may not be blank
02. Clinical chart sections legacy chart teaching learning topic ids ClearValidation: Teaching And Learning Assessment teaching learning topic ids may not be blank
03. Bereavement Assessment: Other is required for this encounter type
04. Bereavement Assessment: Comments is required for this encounter type
05. Bereavement Assessment: Risk Level of Complications to Normal Grief Process is required for this encounter type
06. Teaching And Learning Assessment: General Comments is required for this encounter type
07. Patient time out date must be after Date and Time in.
08. Patient time out time must be after Date and Time in.

- b. The right panel displays up to five recent chart entries for the discipline selected in your chart draft. It also shows the tagged initial comprehensive assessment.
 - To view prior documentation while you chart, select a chart section on the left panel. Then on the right panel, do either of the following:

- Click the  icon to open the chart view on the encounter charting screen.
- Click the  icon to open and view that same section on the right panel.
 - If there are no matching sections, you will receive a message stating that.
 - You will only see chart sections for which you have appropriate permissions.
- c. To change the recent charts that display, click the  icon in the upper right. On the **Chart Search Options** screen, do one of the following, then click **SEARCH**:



The screenshot shows a dialog box titled "Chart Search Options" with a close button (X) in the top right corner. The dialog contains the following elements:

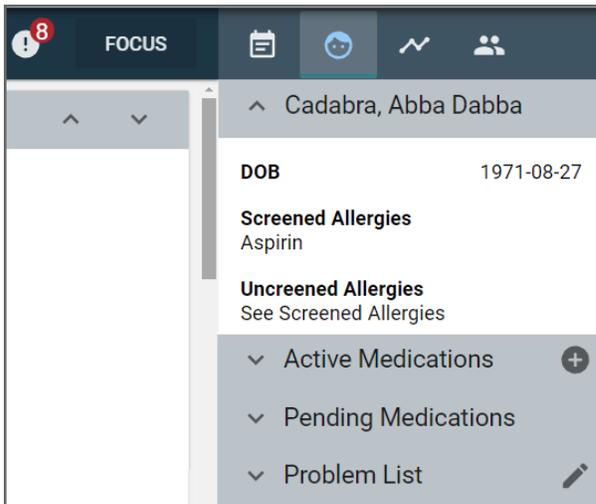
- Discipline:** A dropdown menu currently showing "Bereavement".
- Chart Owner:** A text input field.
- Has Signature:** A checkbox that is currently unchecked.
- Buttons:** "CANCEL" and "SEARCH" buttons located at the bottom right of the dialog.

- Select a different option from the **Discipline** drop-down list to view that discipline's recent charts.
 - If needed, enter a chart owner to narrow the results for that discipline. Begin typing a name, then select an option from the list.
- Select the first option (blank option) from the **Discipline** drop-down list to clear the display and search for the recent charts of all disciplines.
- Select the first option (blank option) from the **Discipline** drop-down list to clear the display, then enter a chart owner to search for charts specific to that user.
- If needed, select **Has Signature** to further limit the results to only signed charts.

Patients Tab

The Patients  tab (formerly known as Problem List) now includes the patient's DOB, allergies, current medications, pending medications, and problem list to reference while documenting.

- Click the  arrow to display the information in a specific section.
- Click the  icon to open the New Medication entry screen in a new tab, then enter a new medication.
- Click the  icon to open the Problem List screen in a new tab, then enter a new problem.



Other Releases Since Version 5.127 on 9.15.21

Claims Documentation

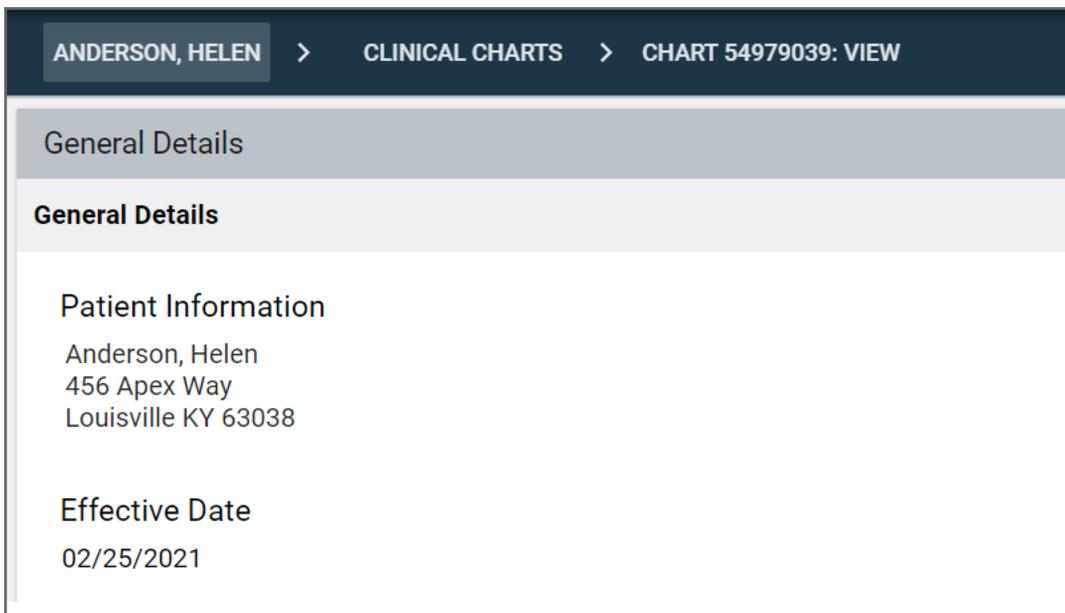
The *CSG Cost Report Guide* was updated and its name changed to *CMS Hospice Cost Report*.

WellSky Mileage (iOS) Release 1.125

Version 1.125 of the WellSky iOS Mileage app was released to the App Store on 9.15.21 and is available for you to update on your devices.

Chart Audit Report and Clinical Summaries View Update

When viewing a chart from the Chart Audit Report or Clinical Summaries on the patient's home page, the chart display has been updated.



New Features and Enhancements 9.29.21

Release 5.127.0 v3

These updates will be released to your production site on 9.29.21 unless otherwise noted. They are currently on your staging site for review.

There is no expected downtime with this release.

Payroll Report – New Filter Option

If you run the Payroll Report by *Line Item Breakdown*, there is a new filter called *Timesheet Export*.

The screenshot shows the 'Payroll Report' interface with the following elements:

- Date Range:** Two input fields and a trash icon.
- Offices:** Three checkboxes: 'Consolo Demo' (Default Area, Default Region), 'PC Tin A' (Default Area, Default Region), and 'PC Tin B' (Default Area, Default Region). A blue button labeled 'Select No Offices' is below.
- User Time Reporting:** A dropdown menu currently set to 'Line Item Breakdown'.
- Timesheet Export:** A checkbox, which is highlighted with a red box in the image.
- Approved?:** Three buttons: 'Any', 'Yes', and 'No'.

If you select this filter, it produces a report that matches the columns on a user's time sheet.

User ^	Office ^	Employee ID ^	Default Role ^	Time Type ^	Care Type ^	Start Date ^
Derrow III, Robbie	PC Tin B		Admin	On call time		09/13/2021
Derrow III, Robbie	PC Tin B		Admin	Patient time		09/14/2021
Derrow III, Robbie	PC Tin B		Admin	Patient time		09/15/2021

Palliative Social Worker Provider Billing – Not being released at this time

To allow palliative billing for social workers, there is now a **Social Worker** option to select when you create or edit the provider's details from **Services > Physicians/Providers**.

The screenshot shows the 'Create a new Physician/Provider' form. The breadcrumb trail is 'Dashboard / Physicians/Providers / Create a new Physician/Provider'. The section is titled 'General Physician/Provider Details'. It contains several input fields: 'First Name' (required), 'Middle Name', 'Last Name' (required), 'DOB' (with a calendar icon), 'Gender' (dropdown), 'Race' (dropdown), 'Physician Assistant?' (checkbox), 'Social Worker?' (checkbox, highlighted with a red border), and 'Supervising Physician' (with a calendar icon).

Once that option is selected, you can connect the provider's profile with their user profile in WellSky Hospice and Palliative (if they have one). Create or edit the user's details from **Admin > Users**, then enter their name in the **Physician NPC** field (begin typing the provider's name, then select an option from the list).

The screenshot shows the 'User System Information' form. It includes a 'Roles' dropdown menu with options: RN, Skilled Nurse, Social Worker, and Speech Pathologist. Below it is the text: 'This field is required. Hold the Control or Command key to select multiple values'. Other fields include 'Default Role' (dropdown with 'Social Worker' selected, required), 'Rows Per Page' (dropdown with '75' selected, required), and 'Physician NPC' (text input with a calendar icon, highlighted with a red border).

Once these are connected, the social worker charges can be billed in Physician/Provider Charges.

Physician Order Text Display Updated

When you add a list of information in the **Orders** box of a Physician/Provider order (first picture), it displays in the same format when you fax or print the order (second picture).

Read Back/Non-Verbal

Read Back to Physician Non-Verbal Order

Orders

- 1. text
- 2. text
- 3. Text

Physician's Order Details

User	Patient	Order Date	Time of Event
[Redacted]	Jackson, Jax	08/17/2021	15:50
Physician	Nurse	Oversight	
Humble, Doctor	[Redacted]	No	
Orders			
1. text			
2. text			
3. Text			
Read Back	Non Verbal Order		
Yes	No		

Bereavement Coordination Documentation

The Community Bereavement Coordination Guide was combined with the Bereavement Coordination Guide. The Community Bereavement Coordination guide will be removed on 9.29.21.