HOPE Client Readiness Checklist

For hospices using WellSky Hospice & Palliative
CMS HOPE Compliance Tool
Effective October 1, 2025

You can complete the items in this checklist on your production sites. Please note that some features may still be under development.

These items align with the upcoming CMS HOPE Tool requirements and will help ensure compliance, quality care, and efficient documentation for your agency.

For more information, go to **Help** > **Reference documents** in the solution, and search for HOPE. See the *Prepare for HOPE* document for detailed information.

This checklist will be updated as needed.

Software Setup

Step 1: Review HOPE Documentation in the Solution

- Go to **Help** > **Reference documents** or **Client Resource Center**, search for *HOPE*, and then review related documents.
- Monitor the release notes for HOPE updates.
- Watch for and review other HOPE communications.

Step 2: Assign Permissions

Assign these HOPE permissions to the appropriate roles:

- **HOPE Dashboard Alert** (to receive dashboard alerts)
- **Hospice Item Set/HOPE Records** (work with HOPE records)
- **Symptom Impact Reviews** (to use in Encounter Charting)
- **View HOPE Operational Dashboard** (Dashboards category) (centralized location to track and batch HOPE records)

Step 3: Set up Encounter Type Templates

- Use the WellSky-created HOPE encounter type templates or create new ones from your existing templates. Include the HOPE fields to capture required information specified by CMS.
- Create templates for each HOPE timepoint: Admission, HUV 1/2, and SFV.
- Review your internal workflows to determine which encounter type templates best align with your organization's needs.

Training Plan

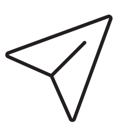
Step 1: Train Staff - Clinical Data Flow | HOPE Operational Dashboard

- Help clinicians see how the information they document—such as Pain, Respiratory, or GI assessments—shows up in the HOPE record.
- Review HOPE-related dashboard alerts with clinical staff.
- Show admin staff how to track HOPE records using the new HOPE Operational Dashboard.

Step 2: Stay Connected and Updated

- Review the CMS HOPE guidelines and timelines.
- Plan for operational adjustments and staff training as new features are released (see the timeline below).
- Keep up with updates via WellSky webinars and release notes.
- Continue to monitor CMS.
- Set up your iQIES account for record submission on October 1.

Timeline: What's Coming in WellSky Hospice & Palliative



Use the WellSky-created HOPE encounter type templates.
.Zip file generation enabled for test file submission to the CMS HOPE Validation Utility Tool.

September 11

Priority enhancements in HOPE Records and the HOPE Operational Dashboard are available in production.

September 25

CMS HOPE is Effective
HOPE AI-Powered Symptom Impact Screening and HOPE data incorporated in CareInsights and Value-Based Insights.

October 1

HOPE VUT-Validations and additional enhancements as completed.

Post-October 1