

# HOPE Client Readiness Checklist

For hospice clinicians using WellSky Hospice & Palliative  
CMS HOPE Compliance Tool | Effective October, 1, 2025

Beginning July 31, 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.

This information will be updated as needed.

## Timeline: What's Coming in WellSky Hospice & Palliative



All HOPE fields for encounter type templates and the HOPE Operational Dashboard will be available in production.

July 31



Batching and submission updates released. Priority HOPE enhancements are available in production.

September 25



**CMS HOPE is Effective**  
AI-Powered HOPE 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

## 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

- Create new encounter type templates that include the HOPE fields to capture the required information specified by CMS.
- New templates may include an RN Initial Assessment, an SFV encounter chart, an HUV-specific chart, and more.
- 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.
- Look for updates on how to connect with iQIES.