

# Self-Service Order Form Instructions

## How do I request WellSky Summarize?

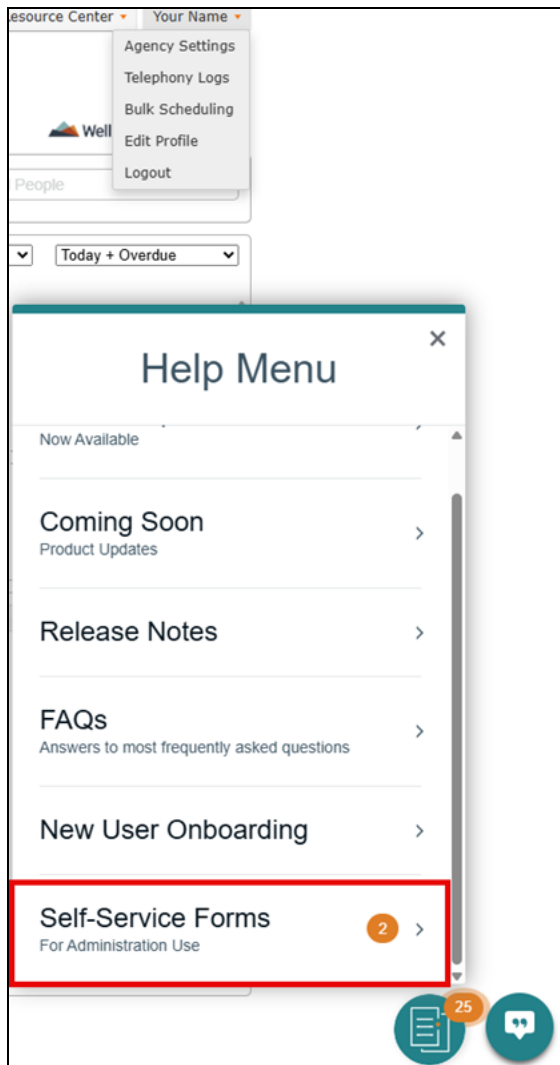
Agency Owners and Super administrators can request WellSky Summarize for their agencies.

1. Log in to WellSky Personal Care on a desktop computer.
2. Select the **Help Menu** icon (📄) in the bottom-right corner of the Dashboard.
3. Select **Self-Service Forms**.

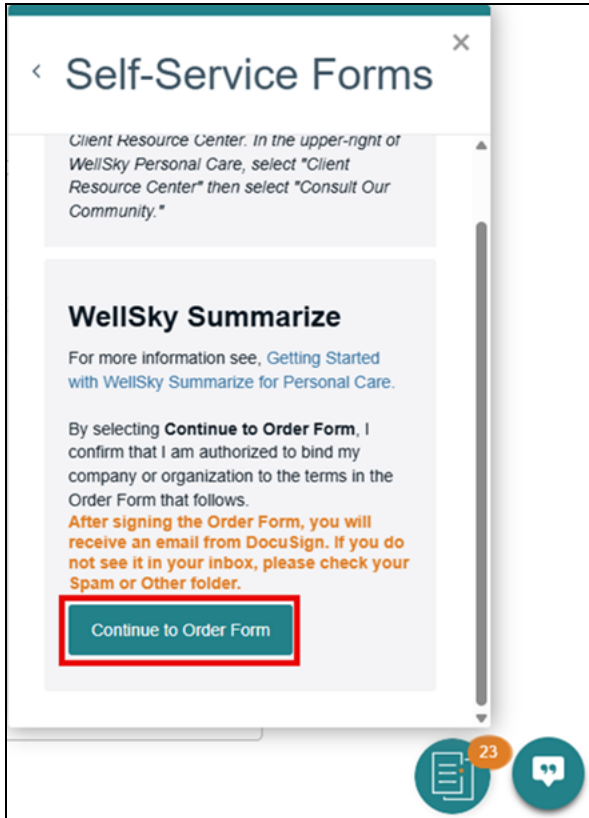


### NOTE:

Users who do not have access to agency settings when they hover over their name will not have access to Self-Service Forms and will need to work with their agencies Authorized Signer. If the Authorized Signer does not have access to the Help Menu, please contact support.



4. Review WellSky Summarize and select **Continue to Order Form**. The WellSky Summarize for Personal Care Agreement Order form opens in a new tab.



5. Select **Start**.



6. Enter the required information about the person authorized to sign contracts on behalf of your agency, and select **Next**.

7. Review the Summary and select **Next**. Upon submitting the Order Form, you will receive an email from DocuSign with the subject "WellSky Summarize for Personal Care Order Form". If you do not see it in your inbox, please check your Spam or Other folder.

8. From the email, select **Review Documents**. The Order Form and Advance Technologies Addendum will opens in a new tab.

9. Select **Continue**.

**WellSky**

**Review and continue**

**Message from Contract Administrator, WellSky Corporation**

Please review and sign this Order Form and Advanced Technologies Addendum. Once complete, WellSky will review and queue for activation.

Please read the [Electronic Record and Signature Disclosure](#).

I agree to use electronic records and signatures. \*

Change Language - English (US) ▾

Other Options ▾ **Continue**

- Finish Later
- Assign to Someone Else
- Decline to Sign
- Session Information

10. Review and Sign documents. Select **Finish**. WellSky Summarize for Personal Care will be turned on within one week.

## Post WellSky Summarize Activation

You will receive a welcome pop-up once WellSky Summarize is activated. Then, enable WellSky Summarize for your clients in Agency Settings.

**WellSky**  
Personal Care  
formerly ClearCare®

Client Resource Center ▾ Your Name ▾

Dashboard Clients Caregivers CareFind

**Dashboard**

**Recent Items**

**Open Shifts**

View in Calendar

**Key Documents**

+ Add Document

**ACTIVATION SUCCESSFUL**

Welcome to WellSky SkySense AI™!

Congratulations! You can now navigate to **Agency Settings > General Settings > Personal Care AI** and enable **Client Summarization** for your agency.

**Personal Care AI**

Personal Settings

- Enable Personal Care Artificial Intelligence (AI) Features

**AI Summarization**

Enable Client Summarization AI for Agency

Upon activation of the Agency Setting, accessing a client profile will reveal an AI icon in the upper-right corner of the screen. Selecting this icon will launch WellSky Summarize.

For an overview of WellSky Summarize, view the article [Getting Started with WellSky Summarize for Personal Care](#)

Remind me in 2 hours Close

\*To view the articles, you must log into the Support Hub. In the upper right corner of WellSky Personal Care, click "Need Help?" then click "Consult Our Community."

Learn more by reading the article [Getting Started with WellSky Summarize for Personal Care](#) in the WellSky Client Resource Center.

**NOTE:**

You must open the WellSky Client Resource Center (CRC) to view this article. Detailed instructions on how to access the CRC please go [here](#).