Family Room Training Packet

This packet contains four documents to help your office staff prepare to roll out the Family Room Portal and ensure that each of your clients and their family members understands how to use the portal.

1. Family Room Training Guide for Administrators

It is important that your administrators understand how the Family Room operates so that they can communicate it clearly to your clients and their family members. This document provides an overview of the setup required for the Family Room, as well as an outline of each of the available features in the Family Room so you can decide how to tailor the experience to your clients and their family members and train them on how to use it.

2. Client and Family Member Handout

This document can be used as a marketing tool, or you can send it to your clients and their family members when you are ready to begin sending invitations to the Family Room. Each page is dedicated to a separate tab in the Family Room to allow you to pick and choose which sections you would like to feature.

3. Family Room Marketing Tips

Read this document to learn how to leverage the Family Room and gain a competitive edge over other agencies in your area.

4. Family Room Setup Checklist

This checklist reviews key items that should be completed prior to rolling out the Family Room. Use it to make sure you have completed each necessary step, and as a review to ensure you are ready to begin inviting clients and their family members to the portal.

Have any additional questions about the Family Room? You can learn more about WellSky Personal Care's Family Room in our Support Hub. To access the Support Hub, hover your mouse over the "Need Help?" tab in the upper right-hand corner of your WellSky Personal Care site and click on "Consult Our Community."

Family Room Training Guide for Administrators

WellSky

What is the Family Room?

The Family Room is a feature in WellSky Personal Care that provides family members with real-time transparency into the care of their loved ones. You have the power to choose whom you invite to use it, as well as how much access those family members have to the portal. The Family Room can also be used as an excellent marketing tool when presenting your agency to new clients and referral sources.

What do your agency administrators need to know before rolling out the Family Room?

Review the items below and/or watch this video to learn everything you need to know:

How do I establish settings related to the Family Room? Go to the “Family Room Options” section of your Agency Settings to choose which tabs to hide from your clients and their family members. Here is also where you can opt to allow family members to be able to see all comments left by caregivers, whether those comments are for an incomplete task or a change in condition, as well as to display caregiver contact information.

1. **How do I invite clients and family members to the Family Room?** Clients and family members can be invited either directly from the “Clients” tab by clicking the “Invite” link under the “Family Login” column, or from their individual profiles. To invite the client from their profile, go to “Edit Profile” and select the “Login” tab. Check the box to allow them to log in to WellSky Personal Care and click “Save.” To invite a family member from the client profile, go to the “Payers and Other Contacts” section and select that family member. Again, select the “Login” tab and check the box to allow them to log in to WellSky Personal Care. Once you save, they will receive an invitation email with a link that will take them to a login page where they will create their own password. After that, they will be able to log in at any time by going to your agency’s WellSky Personal Care site using their email as their username and the password they created for themselves.
2. **How do I log in to a client’s Family Room portal?** You can log in to any of your clients’ Family Rooms at any time to view what people are posting there by clicking directly on the “Clients” tab to view your list of clients. Click on the “Login” link under the “Family Login” column next to any of your clients’ names.
3. **How do I communicate to my clients and their family members the correct way to use each of the tabs we are displaying in the Family Room?** It is important that your clients and their family members understand what they can and cannot do with each of the tabs within the Family Room. Review each of the features within the tabs on the following pages so you can be sure to communicate clearly to your users how to operate within the Family Room.

   Dashboard Tab: This is the main feed that will update with any recent items, such as new care logs (if you are displaying the “Care Logs” tab) and new invoices (if you are displaying the “Invoices” tab). This is also where individuals can post a message for other members in the “What’s on your mind?” field. This message will be posted on the Dashboard and will be forwarded to *all* administrators set to receive alerts unless the individual clicks the down arrow next to "Post" to select a specific administrator to forward the message to prior to posting their comment. The selected administrator(s) will receive an email alert informing them that they have a new message in a particular client's Family Room.

Care Logs Tab: This is where family members can see in-progress and completed shifts scheduled for the client. They can see if the caregiver has clocked in, which tasks they completed for the shift if any tasks were assigned, and if the caregiver clocked out. If you have chosen to display any messages left by the caregiver over Telephony, the family members will be able to listen to those messages here.

Calendar Tab: The calendar tab enables the clients and family members to view when caregivers have been scheduled with shifts for the client (appearing in **teal**). You also have the option here to allow individuals to add their own events to the calendar (appearing in **orange**).

> It is important to note that these family events will not update on your administrator version of WellSky Personal Care, and thus are intended for family use only to mark occasions such as birthdays and visits to the client; they will not be added as shifts to the client shift calendar. This ability can be restricted per individual through the "People" tab.

Invoices Tab: Displaying this tab in the Family Room is a great way to give multiple individuals access to the client's invoices. As soon as the invoice is created, it will be available for the client and family members to download. This ability can be restricted per individual through the "People" tab.

Medications Tab: If your medication management settings have been enabled and you choose to display the "Medications" tab in the Family Room, family members will be able to see which medications have been added through the client's assessment. Additionally, they will be able to add new medications through this tab, which will automatically update the client's assessment when they save that new information.

> It is important to note that if an individual adds a new medication to the client's assessment through the Family Room portal, no alert is generated to any of the administrators. If you are uncomfortable with their ability to do this, it is recommended to hide this tab completely through the "Family Room Options" section of your Agency Settings.

To Do Tab: Through this tab, clients and their family members can assign tasks to any administrator in your office. For example, if they would like a shift to be scheduled or a new task to be added to a shift, they can click the "+" button in the top left and submit the request as a task. The administrator they assign the task to will receive an alert that a task has been assigned, and they will be able to log in to WellSky Personal Care to view the task on their main Dashboard under the "Administrator Tasks" section.

People Tab: This tab will display each of the contacts invited to the Family Room for this client. Each family member will be able to see each other's information here. This is also where administrators can adjust the permissions of each individual to their Family Room. When an administrator logs in, there is a pencil icon to the top right of each individual that they can click on to adjust the member's access. For example, you have the option here to remove the individual's ability to view invoices through the "Invoices" tab, or their ability to schedule events on the calendar through the "Calendar" tab.

Be There with <Agency_Name>'s Family Room Online Care Portal

Insert your agency logo in this table cell

<Agency_Name> Gives You the Option to Monitor Your Loved One's Care Online

We understand how stressful it can be to have a loved one that needs help living independently. At <Agency_Name>, we want to alleviate some of those stresses by giving you real-time transparency to the care process by helping to ease some of the logistical burdens with our online Family Room portal.

With the Family Room (available to you at <no extra cost / $X per month>), you will be able to access records of care online from any device with internet access.

Additionally, you and other family members can use a shared calendar to coordinate between yourselves and track visits scheduled by your caregivers, as well as to track invoices <and enter payments >.

How does this work?

Once you receive an emailed invitation giving you access to our online Family Room portal, you will be able to do the following:

a. Keep live track of caregiver status updates
b. Coordinate and schedule events with other family members
c. View your invoices <and enter payments> online

With the Family Room, not only will you be able to keep track of the financial aspects of caring for your loved one, but you will also be able to track the care provided for your loved one whenever and wherever you have internet access.

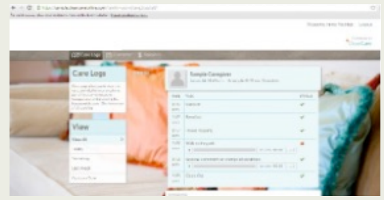
Additionally, whether or not you wish to access our online Family Room portal, you can choose to have invoices sent to you by email. Invoices will be sent in PDF form and can easily be saved to your computer for record keeping purposes.

As mentioned above, these services come at <no extra cost / $ per month> to you. They are a part of our mission to provide the best possible care to your loved one and to empower you with the ability to care for them as well.

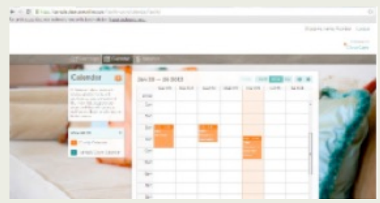
Sincerely,

<First> <Last>
<Title>
<Agency_Name>
<(XXX) XXX-XXXX
<email >
<Address>
<City>, <ST> <Zip>

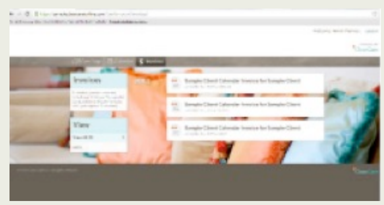
Our Online Family Room



Keep track of status updates in real time, listen to caregiver comments, and know that your loved one is in good hands



Coordinate events with family members



Access your invoices online

"... track the care provided for your loved one whenever and wherever you have internet access."

Be There with <Agency_Name>'s Family Room Online Care Portal (cont.)

Insert your agency logo in this table cell

If you are interested in accessing our Online Family Room, receiving invoices by email, or both, please fill out the following form and mail it in the return envelope provided with this letter.

Your Name: ______________________________ Client Name: __________________________________

(Check all that apply)

❑ Yes! Email me all future invoices!   ❑ Yes! Send me an invitation to the Online Family Room!

Email address: ____

❑ Please also send invitations to the Online Family Room to the following people:

Name	Email address

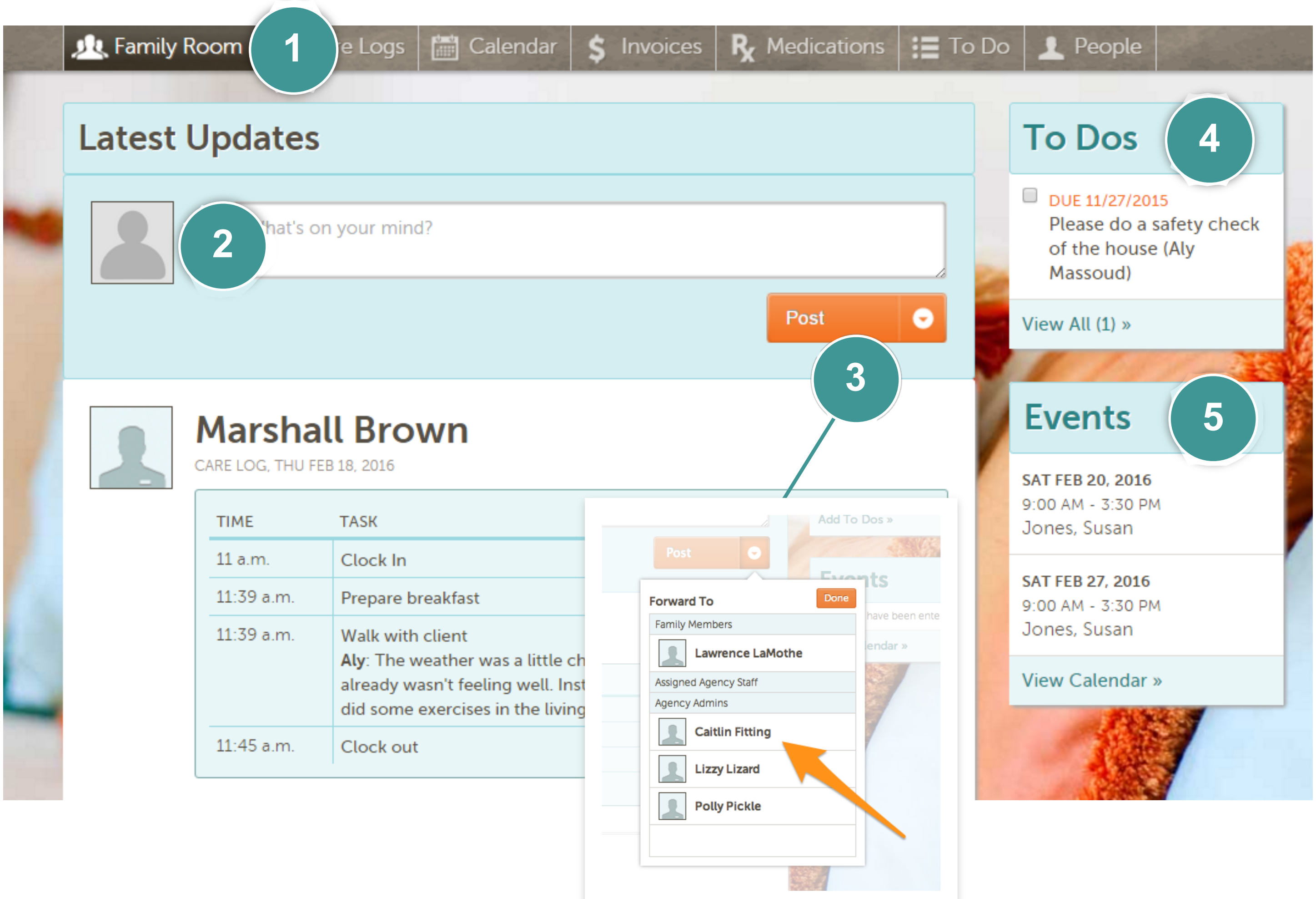
Be There with <Agency_Name>'s Family Room Online Care Portal (cont.)

Insert your agency logo in this table cell

The Family Room Tab

The Family Room tab is a feed of all the information in the Family Room. In this area you can post a comment publicly or direct it to a specific administrator.

1. To access this area of the Family Room, click on the tab in the top left-hand corner of the menu bar labeled "Family Room".
2. In the text box, you can write out a post to the feed. These posts will only be displayed in this section of the Family Room.
3. If you would like to direct your post to a specific agency staff member, you can click on the small button with the downward-facing arrow. You'll be able to select an administrator from a drop-down menu (pictured below). This will also deliver your post to them via email.
4. The "To Dos" section displays any recent to-do items.
5. The "Events" section features any new items on the "Family Calendar".



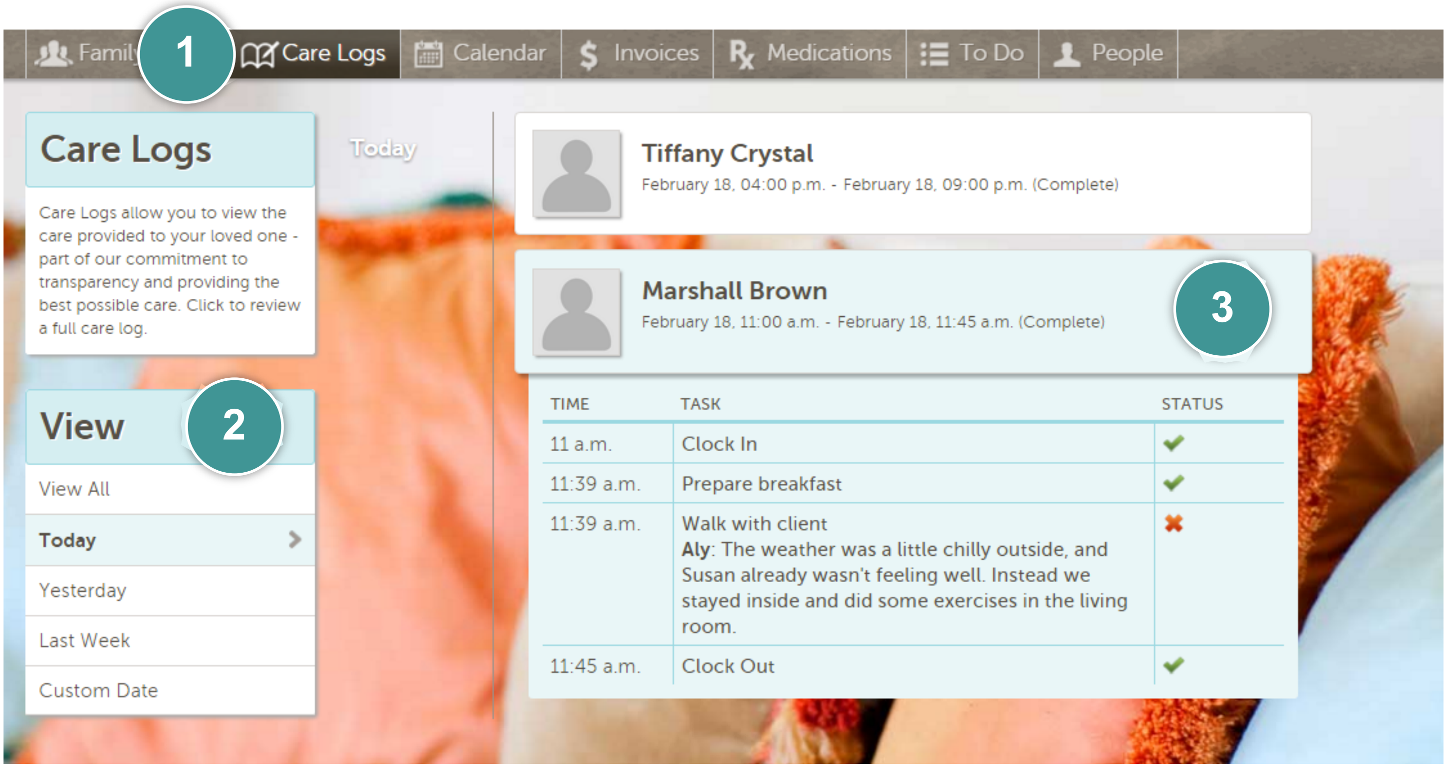
Be There with <Agency_Name>'s Family Room Online Care Portal (cont.)

Insert your agency logo in this table cell

The Care Logs Tab

The Care Logs tab is comprised of completed shifts and the tasks that occurred during each visit. By clicking on the shift, you can see what happened at the point of care in real time.

1. To access this area of the Family Room, click on the tab labeled "Care Logs".
2. To navigate to the visits that occurred in the past, use the options found in the "View" section to pick a day in the past or to select a specific period of time.
3. Once you have selected the time period you are interested in viewing, click the specific shift to see what was done during that visit. This information is updated in real-time and shows the task, the time it was completed, and whether or not it was completed.



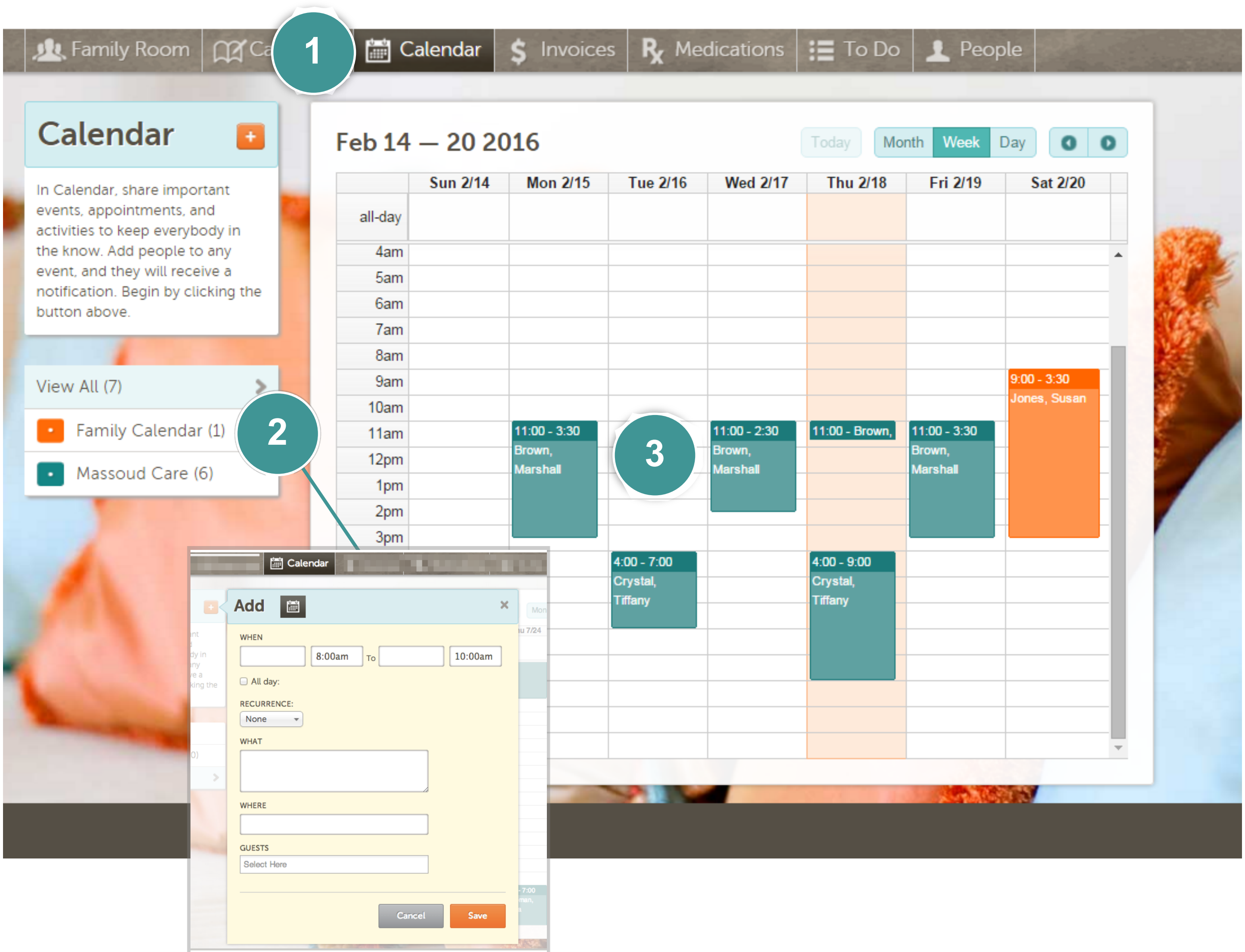
Be There with <Agency_Name>'s Family Room Online Care Portal (cont.)

Insert your agency logo in this table cell

The Calendar Tab

The Calendar tab is a place to view upcoming caregiver visits and to coordinate with family members. You cannot add caregiver visits to this calendar, but you can coordinate information, such as birthdays or visits, with other family members.

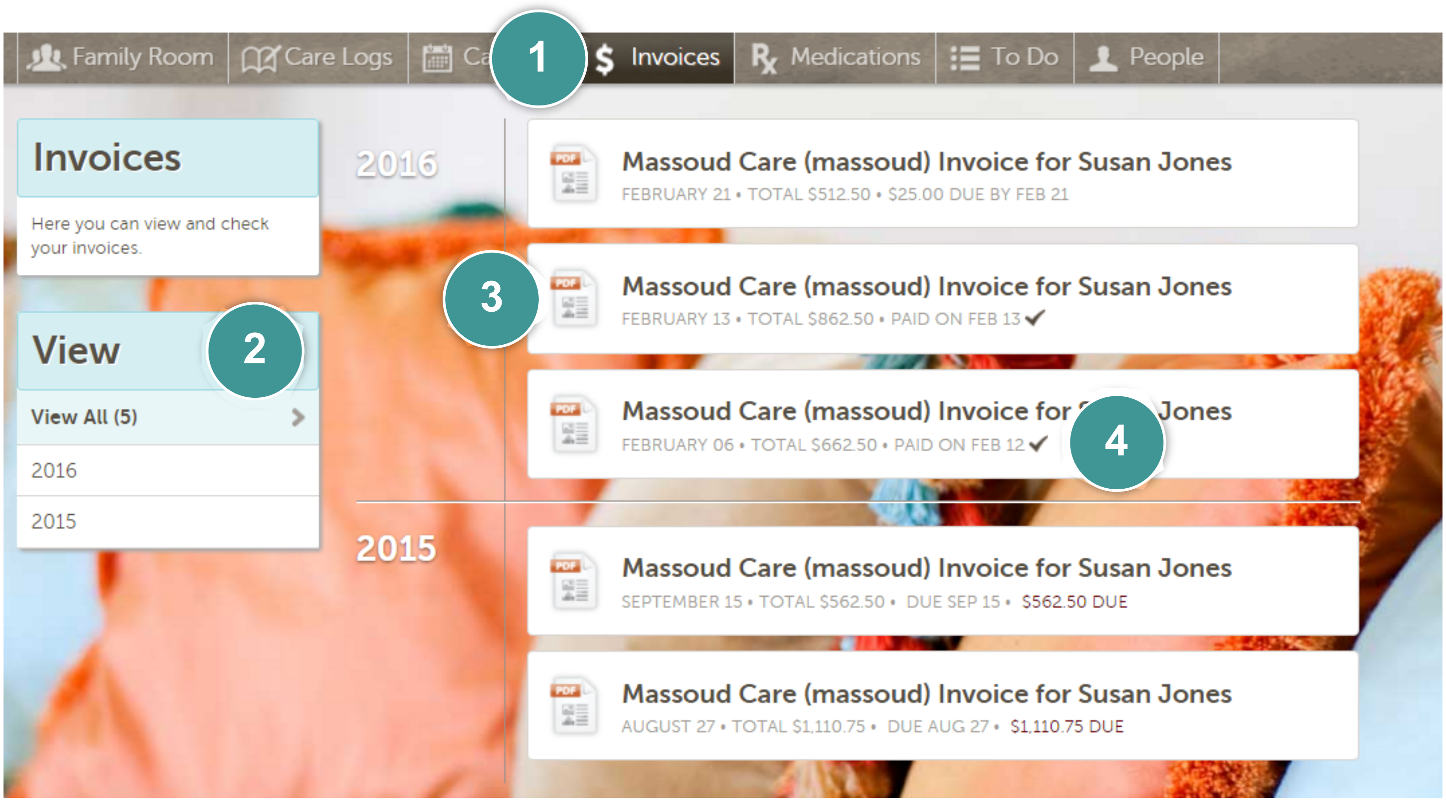
1. To access this area of the Family Room, click on the tab labeled "Calendar".
2. To add an event to your Family Calendar, click the orange "plus" sign on the left-hand side of your screen. These events are for coordinating between family members. This information will not be communicated to <INSERT AGENCY NAME HERE>.
3. The teal calendar on your screen represents scheduled caregiver visits. These cannot be edited. Please contact <INSERT AGENCY NAME HERE> to request changes to the schedule.



The Invoices Tab

The Invoices tab is where you can view a history of all invoices generated by <AGENCY NAME>. You can also track which invoices have been paid and which remain outstanding <and pay for those invoices online>.

1. To access this area of the Family Room, click on the tab labeled “Invoices”.
2. You can choose to view all invoices or select the year you wish to review.
3. Click on the invoice of interest. It will open as a PDF in a new tab illustrating all care logs, rates, amounts, and the total due. If the invoice has been paid it will show a ‘PAID’ stamp at the top of the invoice.
4. If a payment has been made and applied to an invoice, a small check mark will appear at the end of the description of the date and total. If the invoice is outstanding, it will reflect the total dollar amount due.



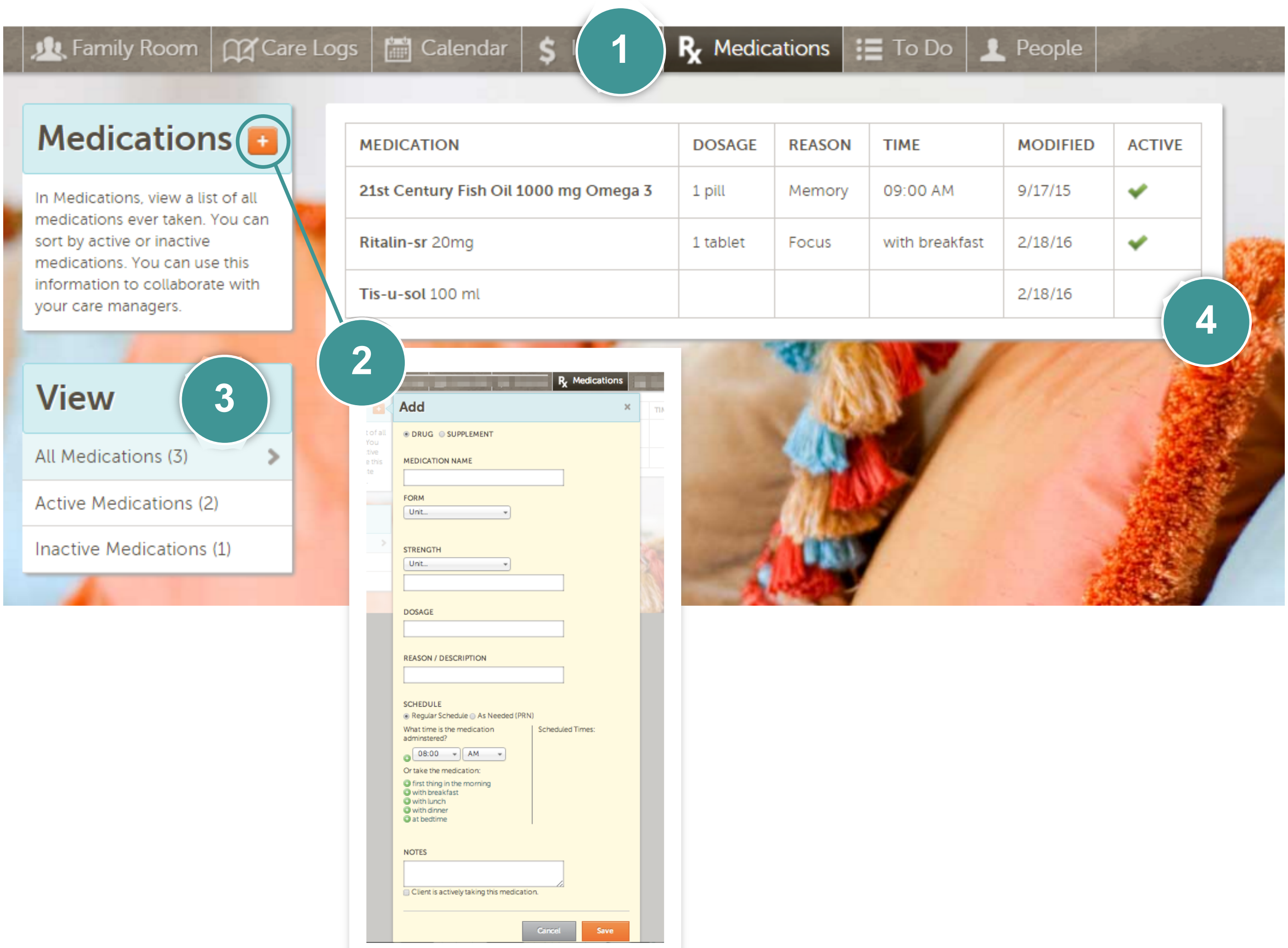
Be There with <Agency_Name>'s Family Room Online Care Portal (cont.)

Insert your agency logo in this table cell

The Medications Tab

The Medications tab is where you can view a list of all medications taken by your loved one. You can use this information to collaborate with your care managers and add new medications or supplements as they change.

1. To access this area of the Family Room, click on the tab labeled "Medications".
2. To add a new medication or supplement, you can click on the orange "plus" sign in the top left corner. You can select a medication or supplement and choose the form, strength, dosage, reason/description, and schedule, as well as include additional notes. Medications added through the Family Room will be added to your client's assessment or plan of care.
3. You can use the "View" option to sort by all, active or inactive medications and supplements.
4. Once you have selected your view, the list of medications will appear on the main section of the page.



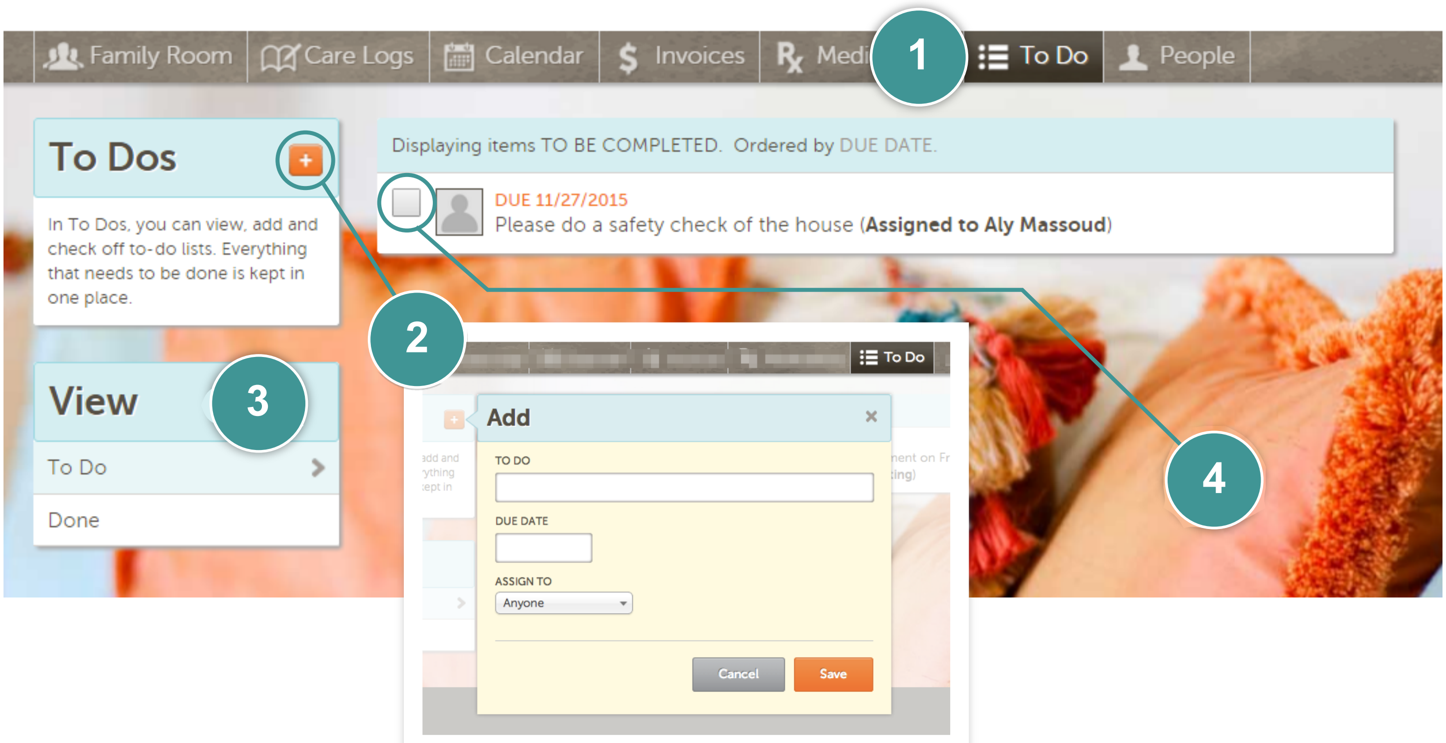
Be There with <Agency_Name>'s Family Room Online Care Portal (cont.)

Insert your agency logo in this table cell

The To Do Tab

The To Do tab is where you can view, add, and check off to dos. The To Dos can also be assigned directly to an office agency staff member.

1. To access this area of the Family Room, click on the tab labeled "To Do".
2. To add a to do, click on the orange "plus" sign next to where it says "To Dos". You can enter the description of the task, due date, and even assign the task to a specific agency staff member.
3. Once you add the to do, you can choose to sort by those that need to be completed, those that have been completed, or both.
4. To mark a task as "complete," simply check the box to the left of the description. The task will move from the "To Do" section to the "Done" section.



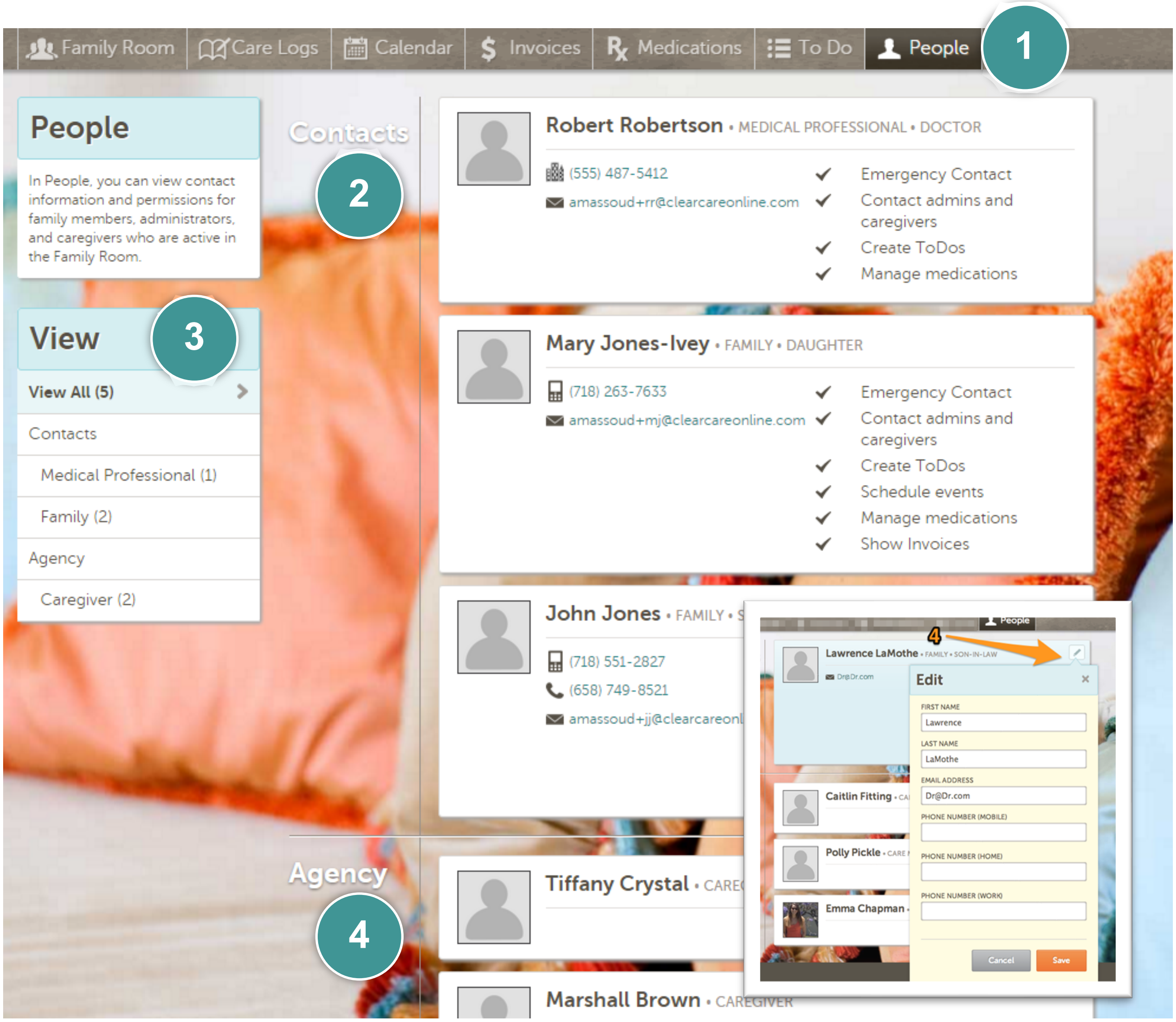
Be There with <Agency_Name>'s Family Room Online Care Portal (cont.)

Insert your agency logo in this table cell

The People Tab

The People tab is where you can view contact information for family members, agency staff members, and caregivers who are active in the Family Room.

1. To access this area of the Family Room, click on the tab labeled "People".
2. The Contacts section of the People tab is where all client contacts are listed.
3. Under the "View" section, you can sort by contacts (family members, doctors, etc.) or agency staff members (care managers, caregivers, etc.).
4. The Agency section shows contact information for agency staff, care managers and caregivers. Click on the profile to view additional contact information such as email addresses and phone numbers.



Family Room Marketing Tips

WellSky

Transparency and Comfort for Families and Loved Ones

Whether your client has a son who lives next door, a daughter in a different state, or a friend who lives overseas, WellSky Personal Care's Family Room portal allows you to give family, friends, medical professionals, and others a chance to see into the home and care of the people they care about most. This offering will give your agency the competitive edge it needs to stay ahead in an industry being driven more and more by technology. When meeting with potential clients, be sure to share the benefits of the Family Room with them and let them know that signing up with you will allow approved individuals to remain up-to-date about the well-being of their loved one with this great real-time, on-demand feature. You can use this video during in-home visits and also host it on your agency's public website: https://clearcare.wistia.com/medias/b5a9l8t5ln

Reduce the Number of Visits to the Doctor's Office

When working with health professionals who could refer new prospects to your agency, be sure to point out the availability of the Family Room. In addition to being able to log in remotely to track the health and well-being of clients, through the "Medications" section, health professionals can update existing medications, inactivate medications that no longer need to be taken, as well as add new medications. Adjustments made to medications automatically update the client's care plan and assessment so that caregivers can ensure clients are taking the right medicine at the right time and in the proper dosage. The ease of being able to do this remotely not only helps doctors react more immediately to the changing health of their patients, but it allows your clients to remain in the comfort of their own home without having to shuttle them back and forth to the doctor's office.

Make Payments

Through the Family Room, clients and their payers can easily log in to pay for the cost of care with a credit card or ACH with WellSky Personal Care's Payment Processing feature, the first of its kind in the industry. Not only does this ensure that you get paid faster, but payers have the ability to review invoices, manage their own payments, set themselves up for autopay, as well as to easily and seamlessly split the cost of care across multiple individuals without you having to create multiple invoices for a single client.

Centralized Communication

Why have multiple channels of communication to keep people in the loop when the Family Room allows for centralized communication around a loved one? The Family Room allows users to communicate back and forth around a client, to schedule To Do items they'd like the agency to accomplish with the client, as well as to schedule events on the Family Calendar so that everyone can remain current with where the client is, what they're up to, and any other pertinent details that family and loved ones care to share.

Family Room Setup Checklist

Settings	☐ Family Room Options are properly set up
For Office Staff	☐ Office staff know how to change the Family Room settings ☐ Office staff know how to send Family Room invitations ☐ Office staff know how to troubleshoot sent invitations if a client or family member is having trouble logging in • How to resend invitations • How to manually create a login for a client or family member ☐ Office staff know how to log in to individual client portals ☐ Office staff know how to communicate the Family Room to clients and family members ☐ Office staff know how to review messages left on the Dashboard ☐ Office staff know how to check assigned tasks ☐ Office staff know how to modify individual permissions to the Family Room
For the Clients and Their Family Members	☐ Clients and family members know how to create their own password ☐ Clients and family members know how to use each of the tabs available to them

Completed By: _____