Wellsky Consolidation Project Q&A

1. **Will users be able to utilize rosters or claim services until the consolidation starts?**
   Yes, users will still be able to update rosters, routes, and any other service delivery information prior to the consolidation.

2. **Are agencies still going to have Admin Users?**
   Yes, agencies can have multiple admin users based on agency needs. Agencies will review user lists and access roles with Wellsky during the consolidation period.

3. **What/Where is the sandbox in the system?**
   The Sandbox is a non-production environment for training and testing. You will have access to the Sandbox and access information will be sent out prior to consolidation start dates. The sandbox can be accessed for validation through the Wellsky Customer Portal under Application Links.

4. **Will users have access to create subservices after the consolidation?**
   No, users will need to email Lauren Gautier, GOEA, to review and receive HCBS approval as part of the request process. Once approved, Lauren Gautier will create the new subservice and notify users of its completion.

5. **Should users refrain from entering data into Wellsky?**
   No, please continue daily operations as usual as long as it does not include updating/adding administrative level data such as; services, subservices, sites, etc. from December 19th until after the consolidation as this data will not migrate into the consolidated database. There will be no pause in access.

6. **How will this affect mobile assessments?**
   The consolidation will not impact mobile assessments and users will not need to validate Mobile Assessments. If a user was provisioned for Mobile Assessments in their current portal, they have new Mobile Assessment links for the consolidated sandbox and production databases.

7. **How long will it take for GOEA to approve subservice requests?**
   Compliance and Planning and HCBS are working on process details and will notify agencies once an approval timeline is in place.

8. **How will users separate routes other than subservices?**
   There is a Routes feature in Wellsky that we will be utilizing to identify routes. A subservice should not be used to identify a route; it is a subset of a service. For example, a home-delivered meal service may have subservices of frozen or hot meals.

9. **How many accounts will have access during the Consolidation Period?**
   All current users will have access to their AAA database for the first week of the consolidation grouping, and then when Wellsky is preparing the user access to the consolidated database, Wellsky will provision the users based on the users that were identified in Step 1 and will review with each AAA. This SHOULD be the same users, so each user should have access to both databases (sandbox and production) when they need it with the exception of the Final Conversion weekends.

10. **When recreating a roster will users still have subservices after the consolidation?**
    You will have to recreate all of your rosters in the consolidated database but you will still have subservices in the system. Once the consolidation is complete, subservice options will only be added in the system by GOEA after HCBS approval.

11. **If users move to using the "Site" function instead of using the site as a subservice will the function to claim as a site be available on the rosters?**
    Yes, the sites exist on the roster and users will be able to report them and break those up to show what each site provided.

12. **Will there be additional costs to add additional users?**
    Yes, one user per license. Nothing will change with the licensing model.

13. **We claim our Assessments by the person who performed that task. Is there a function to show that?**
    Yes, that will be subproviders or service deliveries. Users will not need to make any changes or adjustments to subproviders at this time. Wellsky will be showing users the new structure and how to enter data for them.

14. **Will the consolidation start immediately and is this permanent?**
    The consolidation will start based on the schedule that was previously sent out beginning January 3, 2025. The consolidation is permanent.

15. **Will the consolidation be done online or in-person?**
    The consolidation will be done online via phone call or email. Wellsky will not be visiting any sites. Zoom is recommended for screen sharing capability.

16. **Will subservices in the database prior to December 19th migrate into the consolidated database?**
    The subservice component will not migrate into the consolidated database because it will align as it should be reported in the new statewide admin structure which aligns with the OAAPS reporting and statewide reporting needs.

17. **Will multi-parish agencies have security access to add/update COA system users that fall under their umbrella?**
    Yes and Wellsky will assist agencies with the access feature and permissions at the time of the consolidation. Agency Administrators will have access to manage users for their organization(s).

18. **Will agencies be charged additional costs for Wellsky assistance during and after the consolidation?**
    No, agencies will not be charged additional costs for Wellsky consolidation project assistance.

19. **Will the Multi-Parish AAA Admin Structure change in regards to the COAs that fall under their umbrella?**
    The Multi-Parish AAA Admin Structure will not change in regards to their affiliated COAs. COAs will need to continue following procedures and protocol as outlined by Multi-Parish AAAs.

20. **Will agencies be able to have multiple contacts to lead communication with Wellsky during the consolidation process?**
    Yes, agencies will submit a primary and backup contact, which will need to be submitted to GOEA via survey that was sent out by Kayla Doyle, GOEA, on December 19th.

21. **Will the consolidation be discussed during the 2025 Subgrantee Conference?**
    Yes, the consolidation and reporting information is an intended topic at the conference.

22. **Can agencies utilize any internet browser during and after the consolidation? Is it correct that this will be the same process as now where Microsoft EDGE with IE MODE must be setup?**
    At this time, users will not be able to use any internet browser during and after the consolidation. There is parallel work ongoing with the Wellsky Solutions team to upgrade the deployments of A&D for the entire customer base, which will allow the use of other browsers beyond MS Edge and alleviate the need for Silverlight. However, we do not have a timeframe on this so current usage of the browser and system will remain the same as it is now.

23. **Will the Area Agencies on Aging or AAAs maintain control of user logins, passwords, lockout issues, resetting passwords, terminating users and adding users?**
    The Administrator for the AAA will have access to maintain user information.

24. **During the consolidation process, Wellsky indicates Rosters, Report Definitions and the Consumer Table will not be converted and will have to be re-created once consolidation is complete, how much time will be allowed for re-creation of the reporting structure?**
    The Consumers Table is a part of the consolidation. Due to the updates in the administrative structure, Roster and Report definitions will be obsolete and will need to be re-created in the consolidated environment. During the transition to consolidated environment, AAAs should have time to create their Rosters and Report Definitions. If assistance is needed, please contact GOEA. If additional help is required, GOEA will contact WellSky Professional Services.

25. **Will subservices convert to the new database?**
    GOEA's HCBS team conducted a comprehensive review of the subservices used by all AAAs across the aging network. They found that these subservices were used to capture additional details about service delivery, which could be recorded in other fields within Aging & Disability more efficiently and appropriately. Based on the team's feedback, WellSky Professional Services created a mapping table, similar to the NAPIS Map in Aging & Disability, to map historical combinations to the consolidated administrative structure. This will be further discussed during the consolidation process and documented in the Aging & Disability Database Consolidation Reference Guide.

26. **Will exemptions be made should an agency not be able to fulfil GOEA's required reporting? (Monthly, Quarterly)**
    Any and all exemption requests will require approval from GOEA and will be determined on an as needed case by case basis.

27. **What is the Consumer Table and will agencies have to re-enter every client in their database?**
    AAAs will not need to manually re-enter all the participants. Here's the bullet point from the executed scope of work: Consumer data migration is limited to migration of all WellSky A&D Consumer Demographics (WellSky A&D Consumer Demographics equates to the Consumer table), three (3) years of Service Deliveries and Service Orders, active Service Plans, Activity records, and one (1) most recent Consumer Assessment for each Consumer.

28. **Will Wellsky consolidation include an ALERT that will not allow "Saving" unless the required fields are entered?**
    No, the consolidation will not include a required fields alert.

29. **Will Wellsky consolidation remove the "don't know" and "unknown" fields from drop down menus?**
    No, those fields will not be removed in the consolidation.

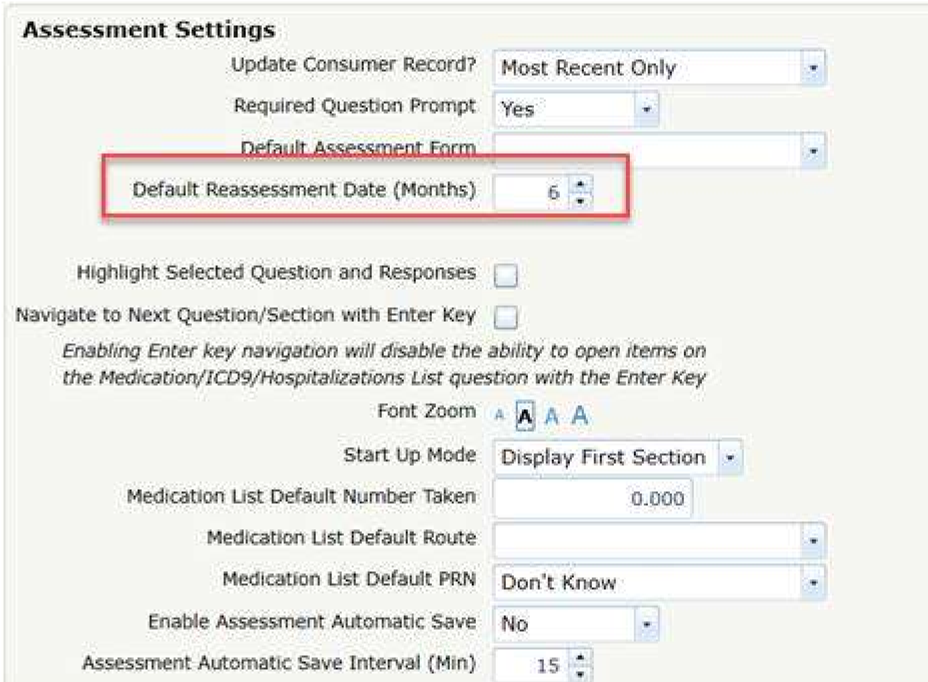
30. **Is there a way we can print the report definition we use for each report in Reports? For rosters, can we print the roster definitions in Rosters?**
    It will not be necessary to print out report definitions or roster definitions, as they will need to be updated to align with the updated administrative structure in the consolidated database that was implemented based on GOEA's taxonomy. With that being said, here are a few tips that I hope will help. If the AAA would still like to reference their historical report definition parameters as they create new report definitions, they may select "Yes" under Printer Parameters in the Report Settings.

For Rosters, it is recommended to take screenshots of the historical roster definitions to use as references when creating new definitions.

31. **During the sandbox validation, is there any specific report criteria that would be helpful for agencies to use while generating Agency Summary Reports?**
It would be helpful for agencies to Group by Care Program and to Subgroup by Fund Identifier.

32. **How do users change the default assessment date?**
    - Click on the user icon in the upper right on the Aging & Disability navigation bar.
    - From the dropdown, click on My Settings.

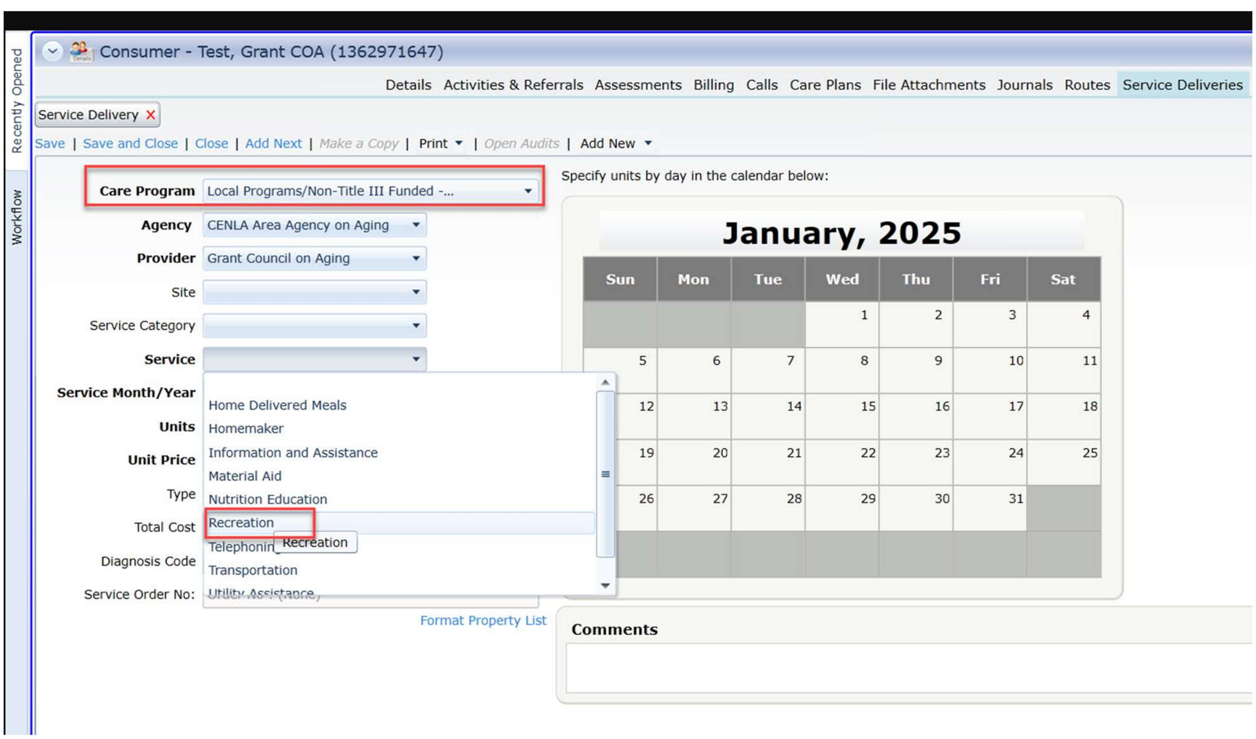
    - Scroll down to Assessment Settings and update the Default Reassessment Date (Months) to 12.



- Click Save and Close.

33. How can local programs (Non SPR reportable services) be entered in the consolidated database?

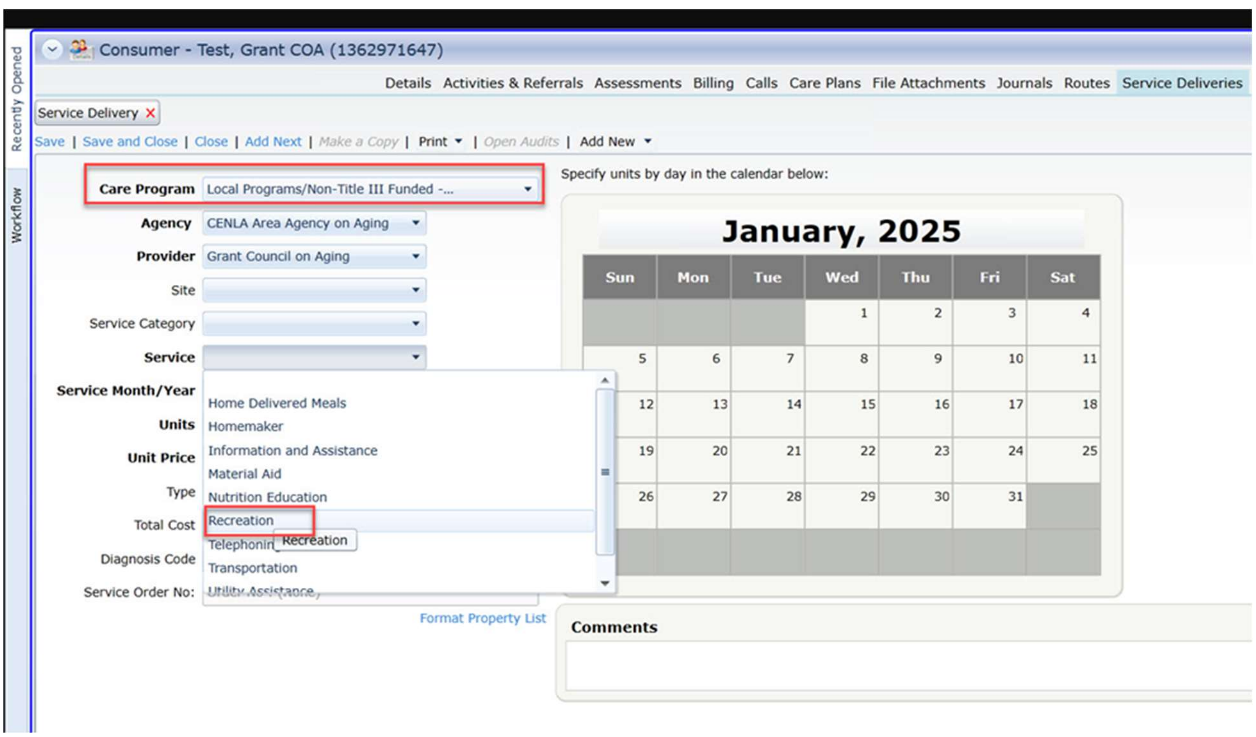
Users will be able to track local programs or other non-title III funded programs similar to the example below. Please see example below to see that there is a care program option you can select to track local programs.



34. **Will users still be able to use rosters with non-registered services?**
Yes, users will still be able to use rosters to add service deliveries for both registered and nonregistered services. All rosters will have to be recreated in the consolidated environment to align with the new admin structure. Once users recreate them, the process will be very similar to the way they were being used prior to the consolidation.

35. **If agencies do not utilize routes, will users need to recreate them in the consolidated database?**
No, this is an optional feature available only if users need it.

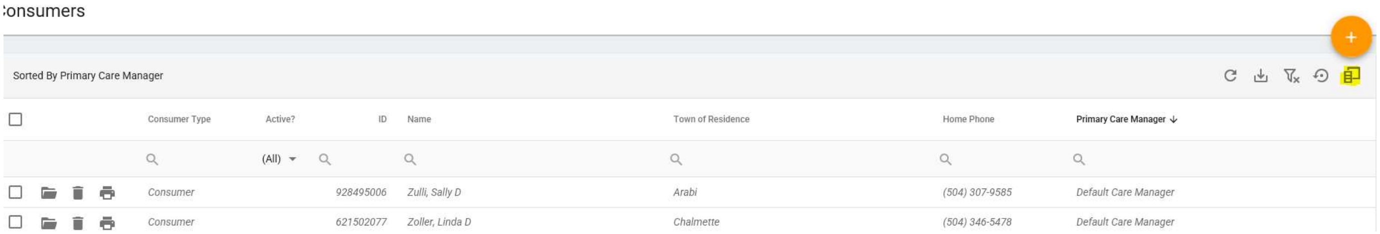
36. **Why is Recreation not showing up as a Title III service option when updating service deliveries or generating reports?**
Recreation is not a NAPIS Title III service. This service is available under the Local Programs/Non-Title III Funded Care Program. Please be reminded to ensure the consumer is enrolled in this program on their Details page and to select Local Programs/Non-Title III Funded from the Care Program dropdown in the service delivery. Please see screenshot below for additional details.



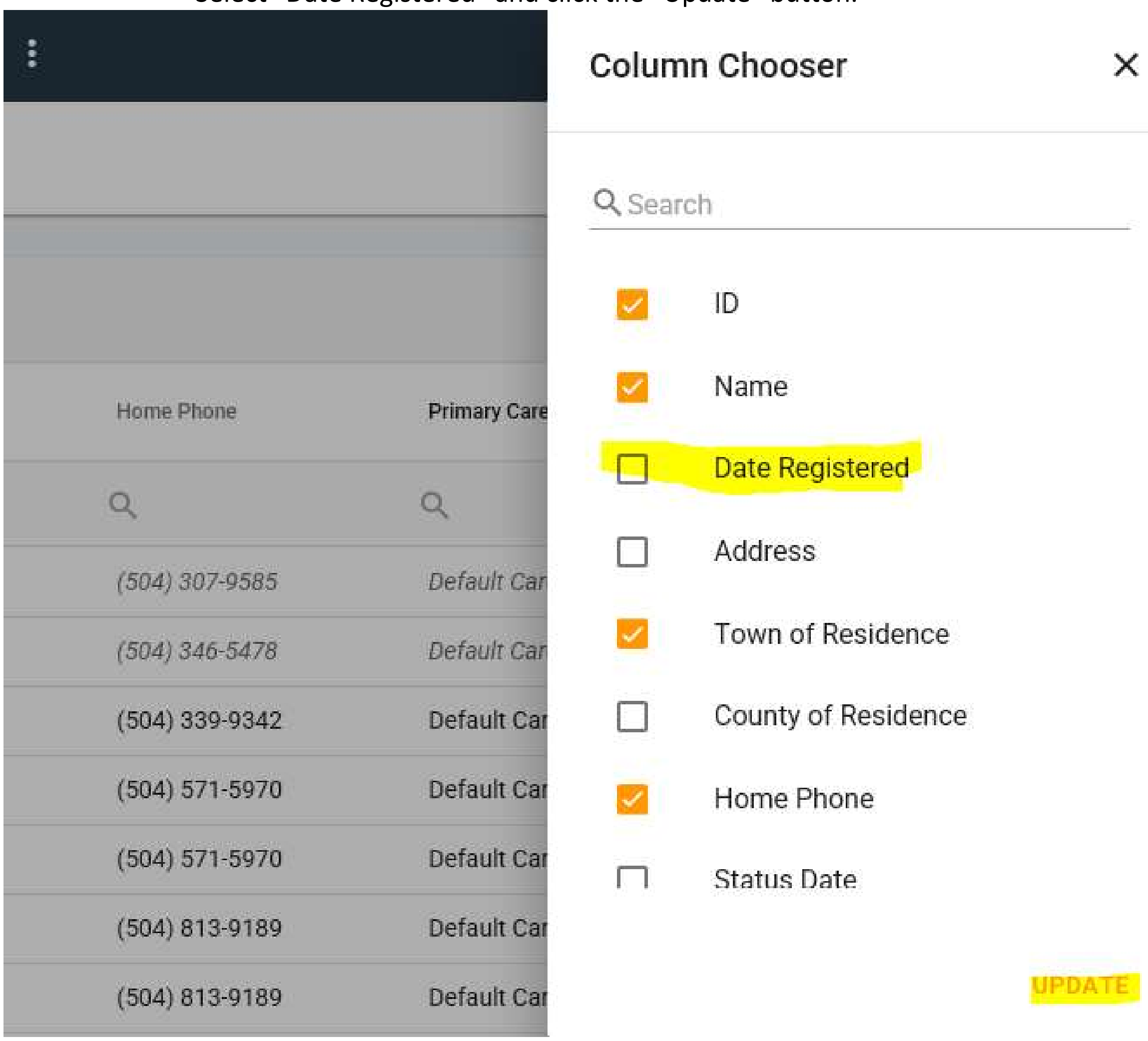
37. **When utilizing the search function in the consolidated database, should users from one agency be able to see clients from another agency?**
Users should be able to search clients and see if the client name is in the system across all agencies. This will be a read-only record.

38. How can users sort consumers by the date/year of enrollment?

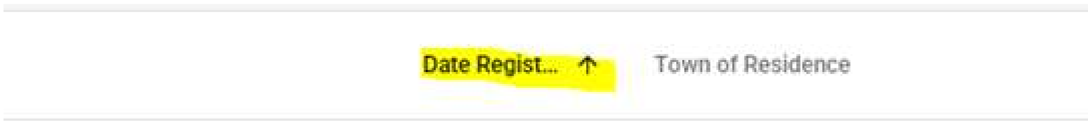
- Users can sort consumers by date/year of enrollment by selecting the highlighted button below to customize the displayed grid columns.



- Select "Date Registered" and click the "Update" button.

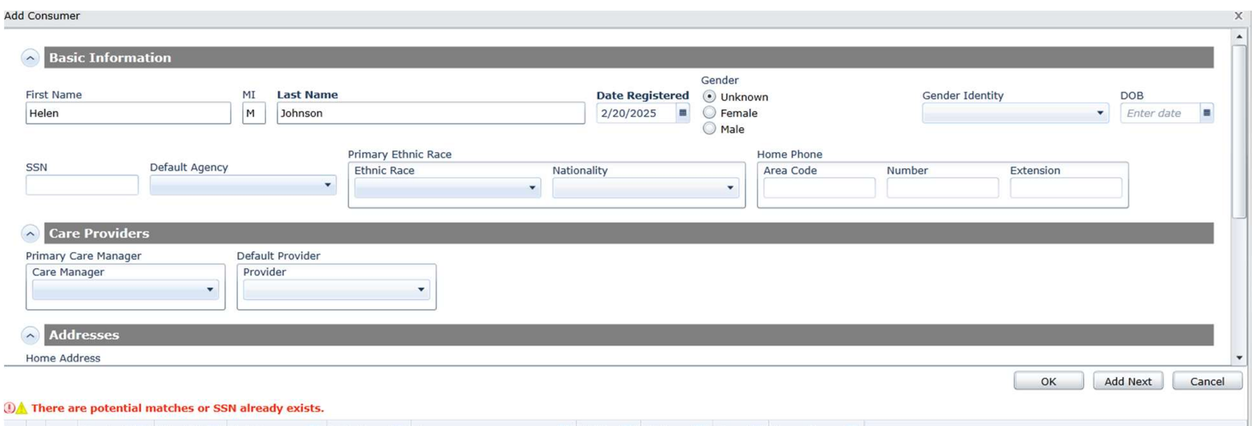


- This will allow users to sort “Date Registered” by clicking the new Date Registered Column. If the arrow next to it is pointing down, it will sort it by most recent to oldest. You can change this by clicking the Date Registered Column.



39. If users enter in a client and they are already in the system, will users receive a duplication warning message?

Yes, users will receive a duplication warning message indicating the client is already in the system. When attempting to add a new client, users will need to verify the client’s information to ensure that the client is not being re-added in the database. This will avoid duplicating clients.



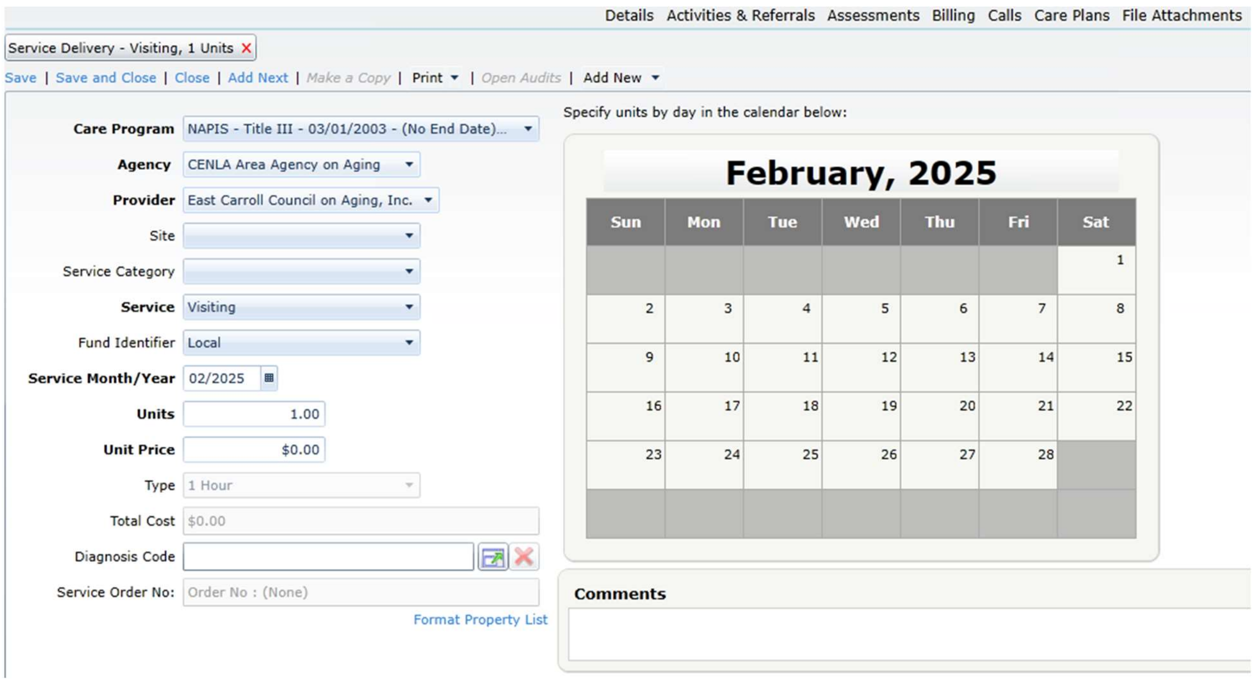
40. How can Administrators update/associate fund IDs to provider records when it is not showing up as an option?

- From Aging & Disability, click on Administrator.
- Go to Organizations/Providers and open the Provider record that needs to be updated. Let’s use Richard Council on Aging, Inc. as an example.
- From the provider record, scroll down to Services and open the service that needs the Fund ID association.
- From the Service window, click Add New/Rate.
- From the Rate window, select the Fund Identifier from the drop-down menu. If the unit rate is known, it may also be entered here.
- If the Fund ID is not available in the drop-down menu, the AAA will need to reach out to the GOEA team to add the Fund ID to the appropriate Service Program.
- Click OK from the Service Rate window.

- Click OK the Service window.
- Click Save and Close from the Provider window.

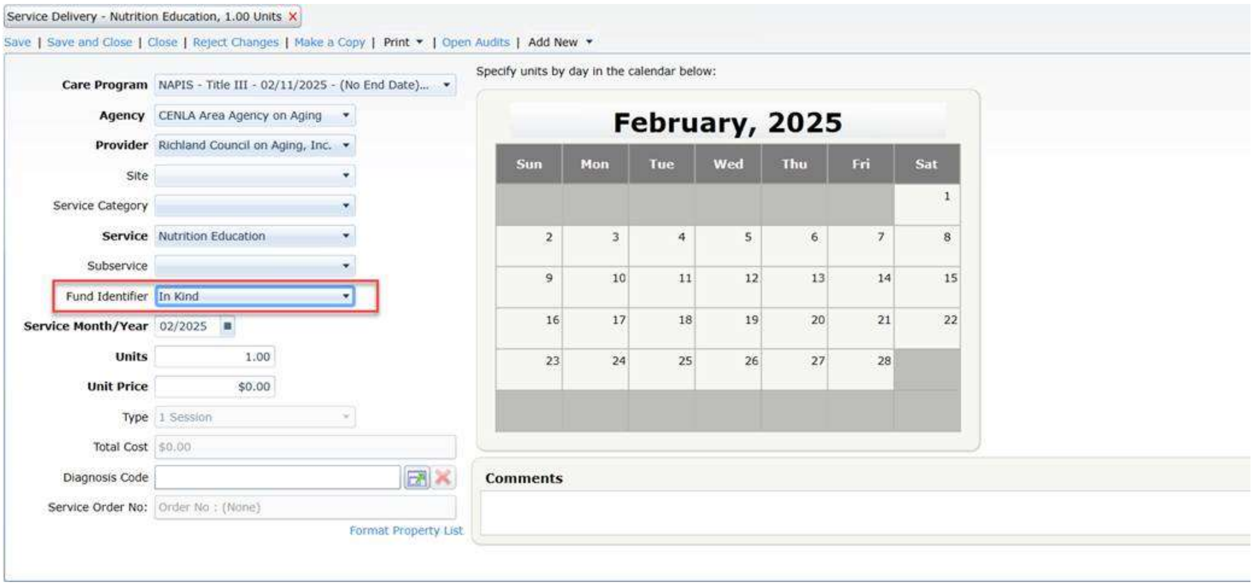
41. How do users enter local Fund Identifiers for Visiting?

Visiting is listed under Napis Title III because it is a Title III reportable service. If a service is being funded locally then users will need to enter it in and be sure to include the fund identifier of local as shown in the example below. User will need to make sure they are correctly selecting the appropriate fund ID if entering a Title III Reportable Service that is not being funded with Title III funds. Please see example below.



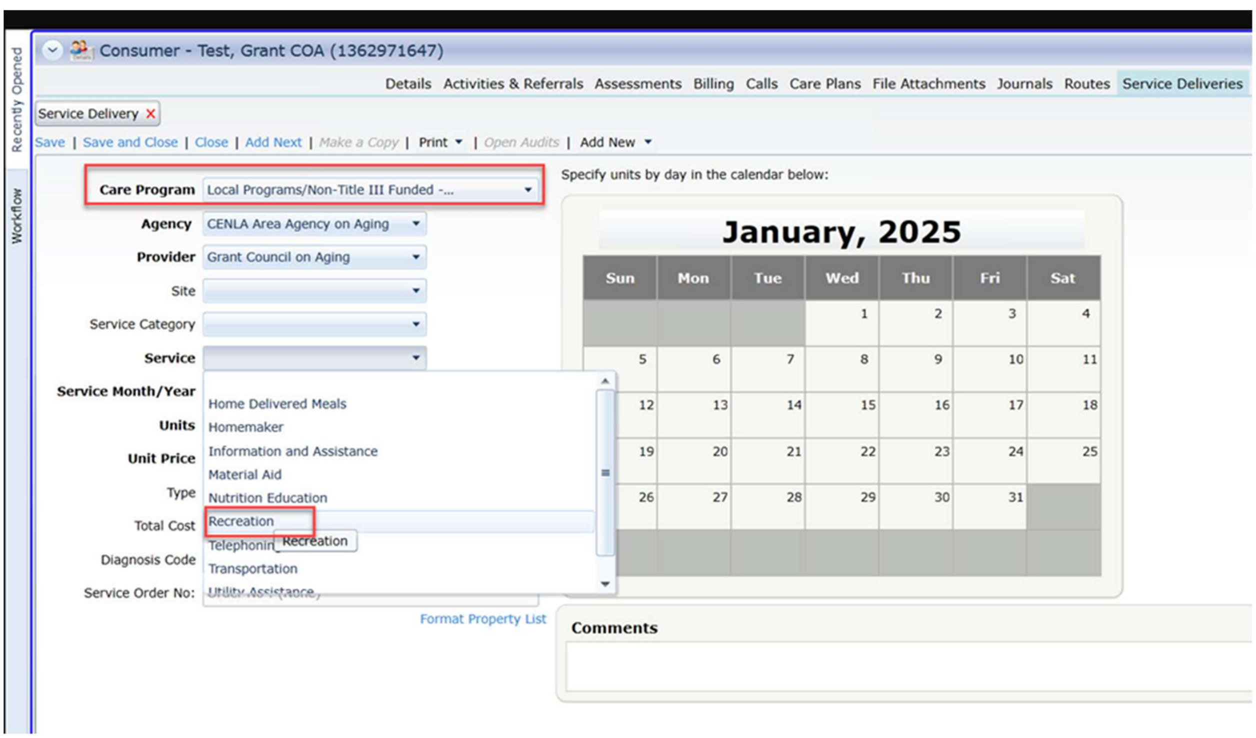
42. How do users enter in Nutrition Education that is not being provided with Title III funding?

Nutrition Education is a Title III reportable service no matter the funding being used. If users are providing Nutrition Education with funds other than Title III then they will select the appropriate fund ID. User will need to make sure they are correctly selecting the appropriate fund ID if entering a Title III Reportable Service that is not being funded with Title III funds. Please see example below.



43. How will users enter Recreation in the consolidated database?

Recreation is no longer a Napis Title III service. This service is available under the Local Programs/Non-Title III Funded Care Program. Consumers receiving Recreation will need to be enrolled in the Local Programs/Non-Title III Funded Care Program and Recreation will need to be selected per the screenshot below.



44. Why is Sitter Service or NFCSP Sitter Service not listed as a service option in the consolidated database?

Formerly known as Sitter Service or NFCSP Sitter Service it is now Companion Service or NFCSP Companion Service. Please refer to the GOEA Taxonomy posted on the GOEA Website on the HCBS webpage for more information.

> 18. **Companion Service** *(formerly Sitter Service)* **(IH)** - A supervisory and companionship service provided in an in-home setting to ensure the health and safety of an individual. It includes observation[1], conversation, offering nutrition / medication reminders and light exercise guidance for the individual.

> 43. **NFCSP Companion Service** *(formerly Sitter Service)* **(S)** – A complementary supervisory and companion service for Caregivers provided in a home setting to ensure the health and safety of the Caregiver's qualifying individual. It includes observing, conversing, providing food for the qualifying individual, etc.

45. Will all available reports in the new database be exportable in Excel?

The newly consolidated database will have the same standard reports in A&D that the AAA databases have. In addition, agencies that call out a custom report that was developed for them in their AAA database will have that same custom report available in the consolidated state database. If the custom report was designed and developed to format for export to MS Excel, then there should be no difference to the way it functions in the new database. Please report any custom reports you may have to Lauren Gautier and Kayla Doyle.

46. If an agency is utilizing the custom fields such as Map Code in the old database, will this be brought over in the new consolidated database?

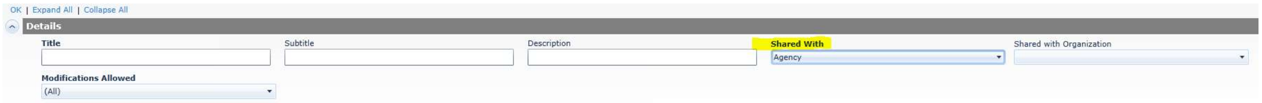
Yes, custom fields will be brought over into the new database.

47. Will only two of the most recent assessments be exported to the new database?

The plan is to bring over the past two years of assessments, not the most current two assessments per client.

48. Users from one agency are seeing report definitions created from another agency. How do users fix this?

Any saved report definitions that are shared with (All) will be visible for ALL other agencies statewide to use and update. **The appropriate recommendation is to not use the Shared With (All) option.** Users should be either setting to share with their Agency/Provider, or if it's only a report that users need access to, can be shared with (None). (State unit) would allow only GOEA to view it.



49. Will agencies have access to the sandbox after moving into production?
Sandbox access will be removed once an agency moves into production. Admins can add access if they wish to test more.

50. Are care plans required in the consolidated database?
No, care plans are optional and are not required in the consolidated database.

51. Will care plans be brought in from the old database into the new consolidated database?
No, care plans will not be brought over into the consolidated database. New care plans created in the consolidated database will remain intact.

52. What is a Fund Identifier?
Fund Identifiers in Aging & Disability may be used to identify and track information about the funding sources of the home and community-based services received by consumers. If agencies have a need for a Fund ID and it is not showing up in Wellsky, please let reach out to Lauren Gautier and Kayla Doyle and they can walk users through how to add them. If users have questions about approved fund identifiers, please reach out to your HCBS Program Monitor.

53. What is a VAC Fund Identifier?
VAC stands for the Covid vaccine fund identifier.

54. How do users add service deliveries to a client that is being served by multiple agencies?
The default agency should be set to the agency for which a client actually resides. If more than one agency will serve the same client they will just add the service delivery to the clients record via service delivery section. This is how both agencies would be able to enter units for the same client they serve. Agencies do not need to change the default provider or default agency unless it is an address change/move type situation. Service deliveries will only be tied to the agencies that provided the service. This will not impact reporting in any way as all services provided by one agency will still show on their report and are only allowed to be edited by the agency that provided the service.

55. **Now that agencies are under one statewide database and have access to confidential client data for other agencies – could this cause a possible HIPPA violation?**
    No, the WellSky Aging & Disability Solution is a fully HIPAA compliant system and provides multiple layers of security protection with login access and provides the ability to filter visibility of data for consumers with multiple administrative controls. Only users that have been identified to have the professional responsibility to provide care and management of the client records will be provisioned access to the system. In addition, organizational privileges have been configured to control data entry across a user's provisioned COA/AAA.

56. **If a client lives in one parish but prefers to travel to another COA/AAA in a different parish and receives services, do they HAVE to track those units in Wellsky (or in general) for serving the client that lives in a different parish?**
    Any Title III Napis reportable services should be entered into the WellSky Aging & Disability database in order to be included in our federal report. The default agency should be set to the agency for which a client actually resides. If more than one agency will serve the same client they will just add the service delivery to the clients record via service delivery section. This is how both agencies would be able to enter units for the same client they serve. Agencies do not need to change the default provider or default agency unless it is an address change/move type situation. Service deliveries will only be tied to the agencies that provided the service. This will not impact reporting in any way as all services provided by one agency will still show on their report and are only allowed to be edited by the agency that provided the service.

57. **What is the window of time users have to recreate rosters, routes, and care plans in the consolidated database?**
    There is no set time limit for users to recreate rosters, routes, and care plans in the consolidated database. However, it is recommended to set them up as soon as possible in order to resume normal daily operations.

58. **Will agencies have access to the old Sams database once they move into production?**
    No, once users move into production they will no longer have access to their old database. This will occur as soon as access to the consolidated database has been granted.

59. **Will the consolidated database still use Silverlight?**
    Wellsky will do away with Silverlight and transition to Web Assembly after the consolidation is complete statewide. Once all agencies have moved into the production environment, this will make for a smoother transition to Web Assembly.

60. **Can users begin adding data into the consolidated environment prior to the scheduled consolidation start date?**
    No, we do not want to provision users access to multiple environments in an attempt to try and prevent agencies from entering data into the wrong environment. This could potentially create huge issues.

61. Why do the client IDs in olds Sams not match the client IDs in the consolidated database and where do these new client IDs come from?

Client IDs are randomly generated once a consumer record is created in Aging & Disability and are randomly generated for privacy purposes. If an agency's business practice is to complete an intake on paper before entering the data into Aging & Disability, the user can leave the Client ID section blank on the paper form. If a user needs it for future reference, they may add it to the form after the consumer is entered into the database.

62. Is there a deadline to have your rosters, routes, and care plans recreated in the consolidated database?

There is not a set time or deadline on when agencies have to have everything recreated in the consolidated database. GOEA is aware that this will require some time to get setup in the new database. However, GOEA does not want agencies to delay their daily operations and/or business processes so it is recommended to get this data entered in as soon as possible.

63. How do users filter reports to only see their agency reports in the Reports tab?

In the Reports Tab, under Service Delivery, select the appropriate agency under the Agency attribute.

64. What is a Custom Field and how can users hide them?

Custom Fields are user-defined fields that store consumer data that is not otherwise captured in A&D. Please see instruction below to hide Custom Fields that agencies do not need.

- Navigate to any consumer record in Aging & Disability.
- Click Open to the left of Basic Information.

Scroll down and click on Format Property List.

For FFS and any other Custom Fields that they are not using, uncheck "Show".

- Click OK. The changes will be applied the next time a Consumer record is open

65. Will agencies have access to their old Sams database?
Yes, AAA Admins will have read-only access to their old agency databases. Agencies will have read-only access for the remainder of the Wellsky Consolidation project.