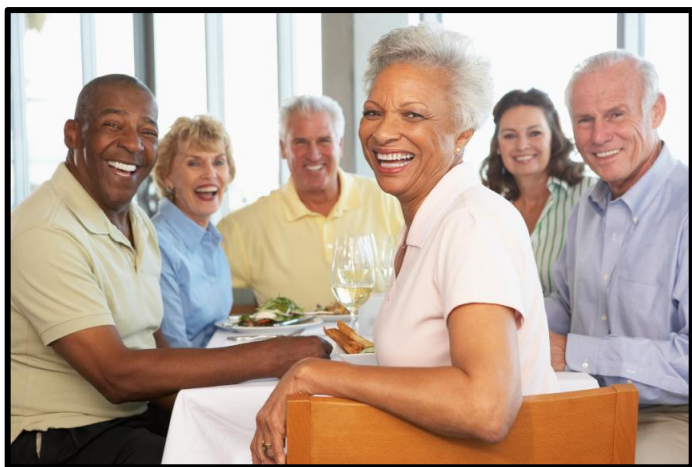


# Welcome / CLS Programs / Reporting / AGNES & A&D

## New Directors Training 2020

Day 1 - Session 1 (1/8) - November 2nd

### *Aging Division Community Living Section*



Hathaway Building  
2300 Capitol Avenue, 4th Floor  
Cheyenne, WY 82002  
Main Office: (307) 777-7995  
Toll Free: (800) 442-2766  
Fax: (307) 777-5340

Email: [wyaging@wyo.gov](mailto:wyaging@wyo.gov)  
WellSky A&D/Data Requests: [aging-sams@wyo.gov](mailto:aging-sams@wyo.gov)  
Website: [health.wyo.gov/aging](http://health.wyo.gov/aging)  
Social Media: [facebook.com/agingdivision](https://facebook.com/agingdivision)

# Introduction from Lisa Osvold - Senior Administrator for the Aging Division



**Lisa Osvold**  
**Senior Administrator - Aging Division**  
**(307) 777-8938**  
[lisa.osvold1@wyo.gov](mailto:lisa.osvold1@wyo.gov)

# Welcome Message

- **Introduction and a brief biography**
- **The Aging Division's Mission Statement**
- **How this mission statement relates to Senior Center Directors.**
- **The Importance of Independence for Older Adults.**

# **Objectives**

## **Day 1 - Session 1 (1/8)**

- **Understand key facts and statistics on aging for Wyoming**
- **Comprehend all the different aspects of the Aging Division WDH**
- **Outline all the Older American Act Title III programs including; B (Legal), B (Support), C1, C2, E (NFCP), E (ORCP)**
- **Briefly outline additional programs handled by the Community Living Section including; Centenarian, NSCP, Ombudsman, POLST and WyHS programs**
- **Review general reporting processes, SAM and CGS procedures**
- **Understand the AGNES form and how to use it**
- **Understand WellSky A&D and how to read PDF reports it creates**

# Aging Division Overview

- One of four divisions within the Wyoming Department of Health
- 205 employees
- Consists of five separate entities:
  - Community Living Section (CLS) with 9 full time employees
  - Healthcare Licensing and Surveys (OHLS)
  - Veteran's Home of Wyoming
  - Wyoming Pioneer Home
  - Wyoming Retirement Center

# Statistics on Aging

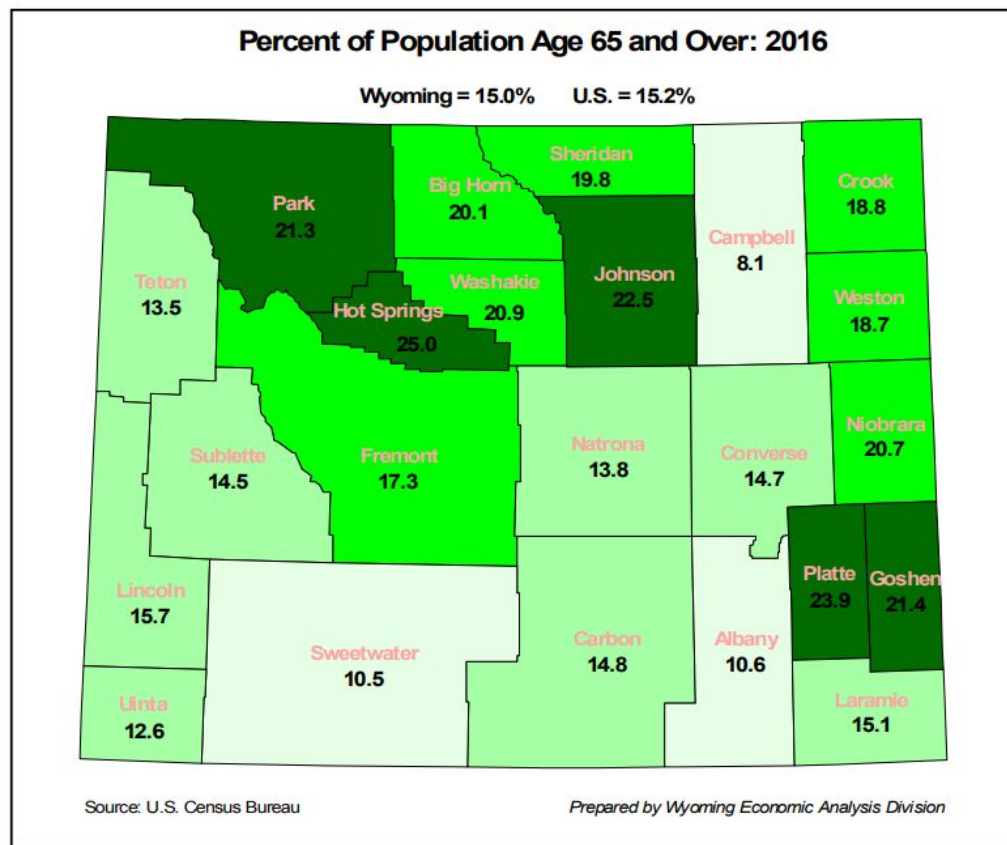
## *Aging Division Community Living Section*



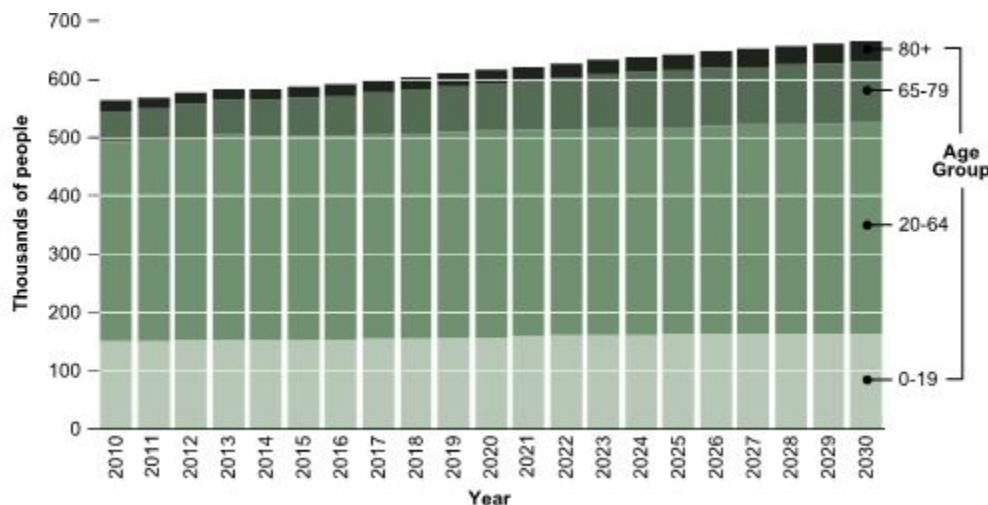


# Wyoming's Aging Population

- **Wyoming's Counties are quite disparate in their population composition.**
- **Oldest county:**
  - Hot Springs (48.7)
- **Youngest**
  - Albany (27.0)



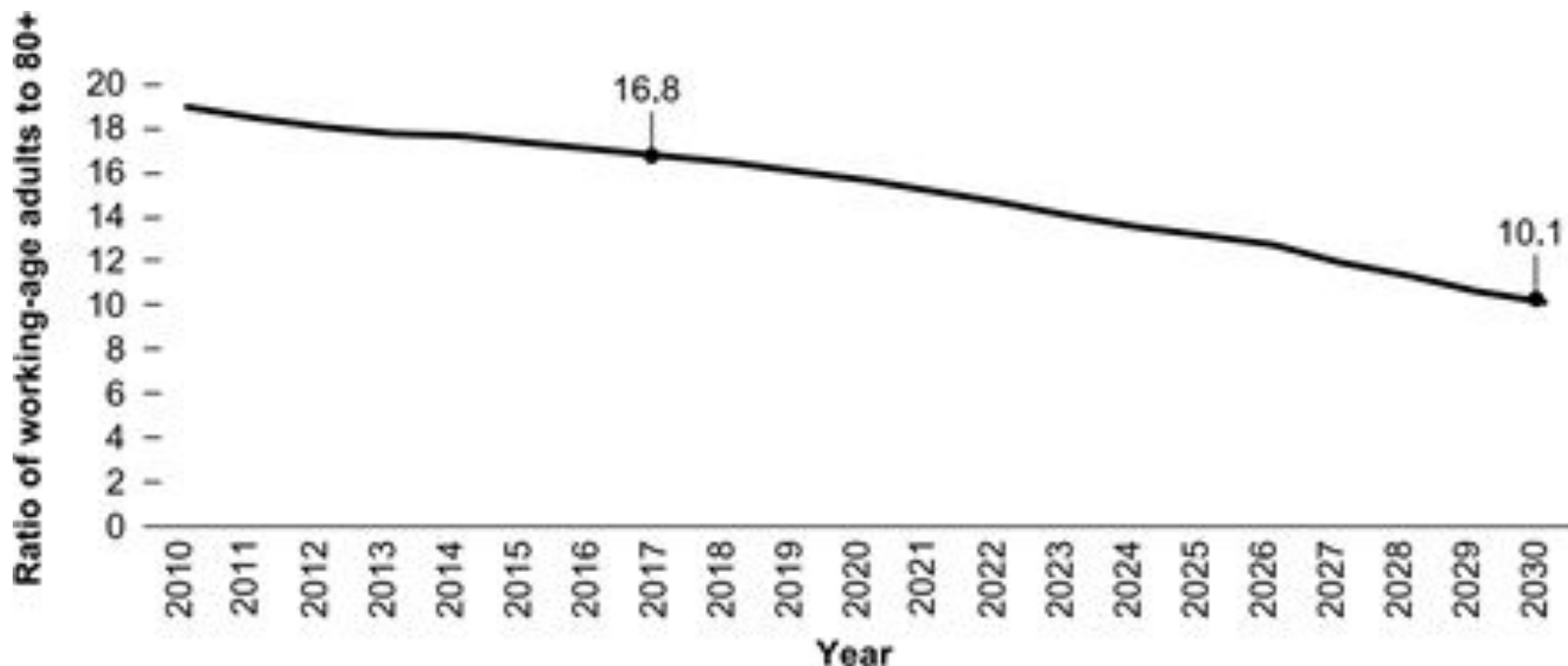
# Wyoming's Demographic Projections 2010 - 2030



- The expected annual average growth rate of people between ages 65 and 79 will be approximately 3.3% per year and the rate for those over 80 will be 5.6% per year.
- In 2017, the State had a projected 71,410 people between the ages of 65 and 79 years and 20,830 persons over 80 years old. By 2030, these numbers are expected to grow to 102,180 and 35,963, respectively.



## Ratio of Working Age Adults to Persons over 80 years old, 2010-2030



- Not only does this ratio indicate that there will be fewer working-age adults paying taxes to support safety net programs, but there will also be fewer adults available to provide informal, unpaid caregiving to the elderly population.

# Introduction to the Community Living Section

## *Aging Division Community Living Section*



# State Unit on Aging

- The Community Living Section is the Federally designated State Unit on Aging.
- Administers the Federal Older American's Act (OAA) Grants.
- Distribution of funds throughout state, based on demographics and other factors (formula)
- Services to people with greatest needs
- Advocate for older individuals – review, comment, and provide technical assistance
- Planning, policy development, administration, coordination, priority setting, and evaluation of all state activities related to the objectives of the Older Americans Act ([OAA](#)).

# Purpose

- To increase the self-sufficiency, safety, health, and wellness of Wyoming's older adults and adults with disabilities.
- To provide support for the caregivers of; older adults, adults with disabilities or young children.
- To prevent premature institutionalization of Wyoming's older adult population.
- To increase the scope and quality of services provided.
- To increase the total number of participants served.

# Older Americans Act

## History

Originally created in 1965, the Older Americans Act ([OAA](#)) latest amendment was signed into law in 2020.

## Titles

- ☐ I – Declaration of Objectives; Definitions
- ☐ II – Administration on Aging
- ☐ III – Grants for State and Community Programs on Aging
- ☐ IV – Training, Research, and Discretionary Projects and Programs
- ☐ V – Community Service Employment for Older Americans
- ☐ VI – Grants for Native Americans
- ☐ VII – Vulnerable Elder Rights Protection Activities

# OAA Programs for Older Adults

***Aging Division  
Community Living Section***







Wyoming  
Department  
of Health

# Title III-B Legal Services



Betty Sones  
Program Manager  
(307) 777-6321

[betty.sones@wyo.gov](mailto:betty.sones@wyo.gov)

## Title III-B Legal Services Summary

**Title III-B Legal Services identifies and serves the civil legal needs of those older adults, particularly those who are most vulnerable due to social and/or economic circumstances, who are frail, isolated and/or direct minorities.**

**The goals of the program are to provide, on a statewide basis, the protection and rights of vulnerable older persons through education, training, networking, and advocacy.**

# Title III-B Support Services



**Betty Sones**  
**Program Manager**  
**(307) 777-6321**

[betty.sones@wyo.gov](mailto:betty.sones@wyo.gov)

# Title III-B Support Services Summary

## **Based on national statistics:**

- **More than 1.7 million Americans die of a chronic disease each year.**
- **80% of older adults have at least one chronic condition;**
- **50% have at least two chronic conditions.**
- **95% of health care spending for older adults is attributed to chronic health conditions.**

# Title III-B Support Services Summary, Continued

**The Title III-B Supportive Services program provides services to support state and community agencies serving older individuals, 60 and over.**

## **Goals of this program:**

- 1. Enable older adults to:**
  - a. access services,
  - b. remain independent,
  - c. be active members of their communities.
- 2. Provide health education and information to:**
  - a. Increase the quality of life of older Americans.
    - i. These services are especially geared towards those who have the greatest economic needs and those with limited proficiency in English.
- 3. Promote physical activities and healthy lifestyles to:**
  - a. Prevent premature institutionalization.
    - i. Such services may include; health, socialization, support, transportation, information, and a wide variety of other supportive services that enrich the lives of seniors.

# Title III-C Nutrition Programs



**Kaitlyn Johnson, RD**  
**Program Manager**  
**(307) 777-5048**

[kaitlyn.johnson@wyo.gov](mailto:kaitlyn.johnson@wyo.gov)



# Title III-C Nutrition Programs Summary

- The Title III-C Nutrition programs include
  - Title III-C1 Congregate Meal program (meals served in group settings)
  - Title III-C2 Home Delivered Meal program
- The programs provide nutrition screening, assessment, education and counseling services
- The program's purpose is to reduce hunger and food insecurity, while promoting socialization and the health and well-being of older adults
- Both programs are intended to improve the dietary intakes of participants
- Nutrition services offer participants opportunities to form new friendships and create informal support networks

# Title III-D Disease Prevention and Health Promotion



**Betty Sones**  
**Program Manager**  
**(307) 777-6321**  
[betty.sones@wyo.gov](mailto:betty.sones@wyo.gov)

# Title III-D Disease Prevention & Health Promotion Summary

**Since 2016, Evidence-based programs now require (the highest level program only) for Title III-D-funded activities. This change allowed older adults to have access to disease prevention and health promotion programs that are based on scientific evidence and demonstrated to improve their health.**

**Wyoming currently runs these three Title III-D programs:**

- **Stanford's Chronic Disease Self-Management Program (CDSMP) HealthyU Program**
- **Tai Chi and,**
- **A Matter of Balance Programs**

# Title III-E National Family Caregiver Support Program



**Jeanne Scheneman**  
**Program Manager**  
**(307) 777-8536**

[jeanne.scheneman@wyo.gov](mailto:jeanne.scheneman@wyo.gov)

# Title III-E National Family Caregiver Support Program Summary

- **Caregivers, 18 years of age and older**
- **Funding is given to local programs across Wyoming.**
- **Caregivers qualify for supportive services.**
- **Supplemental services compliment the caregivers' activities**
  - Providing caregivers with information and assistance about available services for older adults
  - Providing individual counseling and training to assist caregivers in decision making
  - Offering respite care to provide temporary relief to caregivers of their responsibilities
- **Also available to Wyoming residents, (55 years and older), who are supporting children 17 years and younger under the Older Relative Caregivers Program.**

# Additional Programs

## *Aging Division Community Living Section*





# Wyoming Home Services Program (WyHS)



**Jeanne Scheneman**  
**Program Manager**  
**(307) 777-8536**

[jeanne.scheneman@wyo.gov](mailto:jeanne.scheneman@wyo.gov)

# Wyoming Home Services Program (WyHS)

## **The goals of the program:**

- Fostering self-sufficiency
- Preventing abuse, neglect or exploitation
- Maintaining individuals in the least restrictive safe environment
- Preventing inappropriate or premature institutionalization

## **Eligibility:**

- At least 18 years of age
- Determined through an ongoing assessment to be “at-risk” of premature institutionalization
- In need of program services

# Wyoming Senior Services Board (WSSB)



**Marge Myers**  
**Board President**  
**(307) 281-0190**

[marge.myers@wyboards.gov](mailto:marge.myers@wyboards.gov)

# WSSB Overview

## **Governor Appointed Board:**

**The board, in consultation with the Aging Division, appropriates funding to eligible senior centers to provide services and to meet the needs of older adults.**



Wyoming  
Department  
of Health

# Centenarian Program



**Sharon Simpson**  
**Main Office: (307) 777-7995**  
[wyaging@wyo.gov](mailto:wyaging@wyo.gov)

# Centenarian Program

## What is the Centenarian Program?

The Centenarian Program recognizes those individuals who have reached the age of 100 or older. The Wyoming Department of Health will generate a Centenarian certificate for high level staff to sign and a letter for the Governor to sign.

## How can I be recognized?

To be recognized please send the information listed below by fax, email, or postal mail to the Aging Division, Community Living Section. These are the specific items needed:

- Name of Centenarian
- The address to mail the certificate folder with the letter and certificate
- Birthdate and year – in case of being over 100 years old



# National Senior Corps Program



**Betty Sones**  
Program Manager  
(307) 777-6321

[betty.sones@wyo.gov](mailto:betty.sones@wyo.gov)

# National Senior Service Corps Summary

- **Foster Grandparent Program (FGP):** Persons 55 years of age and over, who meet certain income eligibility requirements, volunteer in schools and other community settings to help young people with special needs to learn to their full potential. We provide match funding
- **Senior Companion Program (SCP):** Persons 55 years of age and over, who meet certain income eligibility requirements, volunteer to help frail older adults and other homebound persons who have special needs, assisting them to remain living independently in their homes. We provide match funding.

**The Wyoming Department Health, Community Living Section, in support of the National Senior Corps, provides matching funds for the Foster Grandparents and Senior Companions Programs of the National Senior Service Corps services.**

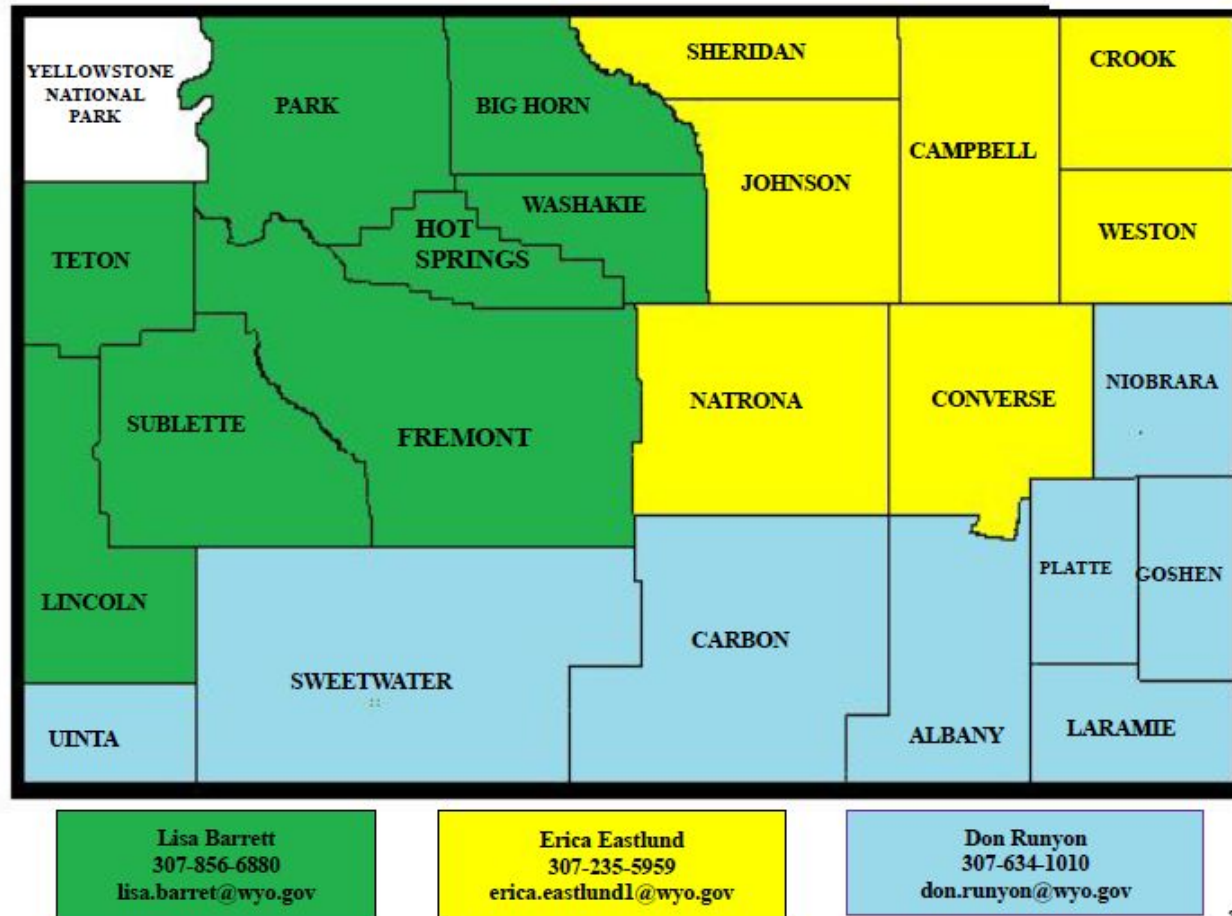
# Wyoming Long Term Care Ombudsman



Patricia Hall  
SLTCO  
(307) 777-2885

[patricia.hall1@wyo.gov](mailto:patricia.hall1@wyo.gov)

# Ombudsman Region Map



5/7/2020

# Wyoming Long Term Care Ombudsman Summary

**The Long Term Care Ombudsman Program is available for when you have concerns about the care or treatment provided in long-term care such as admissions, transfers, discharges, health services, conflicts with staff, food service, recipient funds, and billing and/or charges. Also, if there are problems related to the rights of residents of long-term care facilities as citizens and as residents.**

**The Ombudsman Program can assist you in resolving issues that pertain to your well-being, resident rights, and improving community education and awareness of quality long-term care services.**

# Provider Orders for Life Sustaining Treatment (POLST)

*Do Not Resuscitate / POLST Bracelets for*



Mark Kelly  
Program Manager  
(307) 777-7988  
[mark.kelly1@wyo.gov](mailto:mark.kelly1@wyo.gov)



# What is WyoPOLST?

- A POLST form is a medical order signed by a provider and the patient or his/her representative.
- It is an effort to take a patient's wishes and put them into a concise, actionable medical order.
- It is transferable across healthcare settings and enhances communication among all healthcare professionals.
- It is a legal document implemented in Wyoming by the legislature in 2015. It replaces the ComfortOne bracelet.
- Providers are mandated by law to accept a completed WyoPOLST form.
- It should be printed on bright gold paper to make it easy to find in the medical record.
- It is NOT an Advanced Directive.

# Provider Orders for Life Sustaining Treatment (POLST) Summary

**Providers are mandated by law to honor the orders stated in the patient's WyoPOLST form immediately, but the patient's provider is obliged to examine, assess, and review the orders any time the patient transfers to a new health care setting, as health status and goals of care may have changed. The provider may then issue new orders consistent with the most current information about the patient's health status, medical condition, treatment preferences, and goals of care.**

**POLST bracelets are now available to order through our third party partner, StickyJ Medical ID. The patient must send a copy of the signed POLST order with the DNR option selected in order to receive a bracelet. Bracelets cost \$27.90 for a surgical stainless steel bracelet. [Bracelets Sticky J](#).**



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# Important Information

## *Aging Division Community Living Section*



# Reporting Responsibilities

- **Financial Report**
  - Grant Expenditures
- **Program Reports**
  - Each form must have an original signature.
- **Failure to submit**
  - May result in payment delays or suspensions.

# Grant Applications & Contracts

## Title III Grant Application Packets

- Grant funding awarded through a competitive process.
  - New Grants
    - Public notice published in newspapers with statewide circulation
  - Continuing grant years,
    - Title III Program providers will receive notification and an application to re-apply for the continuing grant.
  - Successful grant applicants will be required to enter into a binding contract with the WY Department of Health, Aging Division, Community Living Section.

# Funding Sources

- **Grants (State and Federal Funds)**
- **Program Income**
- **Voluntary Contributions**
- **Local Match (including Cash/In-Kind)**



# Funding Sources – State & Federal Funds

- **STATE funds**, through the Wyoming Department of Health, Aging Division, Community Living Section are appropriated each biennium by the Wyoming Legislature. The funds are budgeted to specific programs, and must be used for the purposes intended by the legislature.
- **FEDERAL funds**, authorized by Congress under the Older Americans Act (OAA), are administered by the Administration on Aging (AoA)/CLS in Washington, D.C. Individual states are allocated a portion of this funding based on census data.

# Funding Sources – Program Income

- Based on information ascertained from the Administration on Aging and in accordance with CFR 45 (Code of Federal Regulation),

**Program Income will be utilized for expansion of services.**

## **92.21 PAYMENT**

92.21(f)(2) Grantees and sub grantees shall disburse program income, rebates, refunds, contract settlements, audit recoveries and interest earned on such funds before requesting additional cash payments.

### **92.25 PROGRAM INCOME**

(a) General. Grantees are encouraged to earn income to defray program cost. Program income includes income from fees for services performed, from the use or rental of real or personal property acquired with grant funds, from the sale of commodities or items fabricated under a grant agreement.

(b) Definition of Program Income. Program income means gross income received by the grantee or sub grantee directly generated by a grant supported activity, or earned only as a result of the grant agreement during the grant period.



## Funding Sources – Voluntary Contribution

What the client may contribute toward the cost of the service – this applies only to OAA programs

- **Older Americans Act (OAA) section 315:**
  - clearly inform each recipient that there is no obligation to contribute and that the contribution is purely voluntary
  - provide each recipient with an opportunity to voluntarily contribute to the cost of the service
  - voluntary contributions may be solicited for services IF the method of solicitation is non-coercive
- Do not send out Bills, invoices or demand notice of payment
- Statements are the only form that may be sent to a client requesting a contribution

# Funding Source – Local Match

- **What is Local Match?**
  - The non-federal share of cost that the grantee is required to contribute to accomplish the purpose of the grant.
- **What are limitations of local match?**
  - Local match must be from non-federal sources
  - This means, local match cannot be from any federal or state funding sources
    - **Exception: Wyoming Senior Services Board funding may be used for match**
  - The same cash, effort and /or goods cannot be used to match more than one project.
- **Matching funds may include:**
  - Non-federal public or private funds
  - Funds that are not used as match for any other federal program
  - Is either the grantee organization's own funds (general revenue) or cash donations from non-federal third parties (i.e. partner organizations).

# Funding Source – In-Kind

- **In-Kind Match Contribution**

- Form of the value of personnel, goods, and services.
- Grantees and third parties must document the contributed resource of value.
  - For Example:
    - Volunteer Services
      - » Description of the activity
      - » Date of the activity
      - » Name and signature of a volunteer
      - » Number of hours worked
      - » Market value salary for work completed



Wyoming  
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of Health

# Aging Needs Evaluation Summary (AGNES)

## *Aging Division Community Living Section*

¿Hablas Español? ☐ Si ☐ No

¿Necesitas un documento en Español? ☐ Si ☐ No

**Aging Needs Evaluation Summary (AGNES) - One Form**

This form may not be altered. Revised 6/7/19. Effective 7/1/19.





Wyoming  
Department  
of Health

# What is the AGNES?

¿Hablas Español? ☐ Si ☐ No

¿Necesitas un documento en Español? ☐ Si ☐ No

## Aging Needs Evaluation Summary (AGNES) - One Form

This form may not be altered. Revised 6/7/19. Effective 7/1/19.

- **The AGNES is the one form for data collection for all eligible participants. It is what quality assurance checks require to be filled in accurately and updated where appropriate.**
- **The AGNES is available in English and in Spanish.**
- **At the bottom of each page of the AGNES is a list of the corresponding programs that page is needed for data collection.**

Signature \_\_\_\_\_ Date \_\_\_\_\_

\*This page is for WDH, Aging Division Title III-B, C1, C2, D, E and WYHS eligible participants.





# AGNES

¿Hablas Español? <input type="checkbox"/> Si <input type="checkbox"/> No		Aging Needs Evaluation Summary (AGNES) - One Form	
¿Necesitas un documento en Español? <input type="checkbox"/> Si <input type="checkbox"/> No		This form <u>may not</u> be altered. Revised 6/7/19. Effective 7/1/19.	
<b>Basic Client Information</b>		Date of Assessment:     /     /	Nickname:
Legal First Name:		Legal Last Name:	Middle Initial:
Date of Birth:     /     /	Age:	Gender (check one): <input type="checkbox"/> Female <input type="checkbox"/> Male	Are you disabled? <input type="checkbox"/> Yes <input type="checkbox"/> No
Residential Address:		<input type="checkbox"/> Check if same as Residential Address Mailing Address:	
Residential City, State and Zip Code:		Mailing City, State and Zip Code:	
County of Residence:		Email Address:	
Primary Phone Number: (     )		Secondary Phone Number: (     )	
Primary Language (check one) <input type="checkbox"/> English <input type="checkbox"/> Other	Race (check one) <input type="checkbox"/> White <input type="checkbox"/> American Indian/Alaskan <input type="checkbox"/> Asian <input type="checkbox"/> Black/ African American <input type="checkbox"/> Other <input type="checkbox"/> Native Hawaiian/ Pacific Islander		Ethnicity (check one) <input type="checkbox"/> Hispanic or Latino <input type="checkbox"/> Not Hispanic or Latino
Are you married? <input type="checkbox"/> Yes <input type="checkbox"/> No <input type="checkbox"/> Widowed <input type="checkbox"/> Other	Do you live alone? <input type="checkbox"/> Yes <input type="checkbox"/> No	Do you live in a rural area? <input type="checkbox"/> Yes <input type="checkbox"/> No	
Are you eligible for Medicaid? <input type="checkbox"/> Yes <input type="checkbox"/> No	Are you a veteran? <input type="checkbox"/> Yes <input type="checkbox"/> No	Are you the spouse or dependent of a veteran? <input type="checkbox"/> Yes <input type="checkbox"/> No	
Is your monthly income at or below this amount? Family size 1- \$1,041     Family size 2- \$1,409     Family size 3- \$1,778     Family size 4- \$2,146		<input type="checkbox"/> Yes <input type="checkbox"/> No	
Emergency contact name:		Relationship:	Phone number: (     )
Are you working? <input type="checkbox"/> Full Time <input type="checkbox"/> Part time <input type="checkbox"/> No		Are you willing to volunteer? <input type="checkbox"/> Yes <input type="checkbox"/> No	
How did you hear about our services and what services are you interested in receiving?			
<small><b>Use of Information:</b> The information you provide on the AGNES form will be disclosed to the Wyoming Department of Health (WDH), Aging Division, Community Living Section. The WDH will only use or disclose the information as permitted by the Health Insurance Portability and Accountability Act (HIPAA). For more detailed information on how the WDH may use or disclose your health information, please see the WDH Notice of Privacy Practices found online at <a href="https://health.wyo.gov/admin/privacy/">https://health.wyo.gov/admin/privacy/</a> or you may request a copy from the WDH Aging Division by calling 1 (800) 442-2766. If you feel you have been treated inappropriately, received services that have not been of the quality expected, or you have not been provided services as stated in the service plan, you may contact the Wyoming State Long Term Care Ombudsman at 1 (800) 856-4398 or the WDH Aging Division, Community Living Section at 1 (800) 442-2766.</small>			
Signature _____		Date _____	
<small>*This page is for WDH, Aging Division Title III-B, C1, C2, D, E and WYHS eligible participants.</small>			

# AGNES - Summary by Page

Page	Program/s	Description
1	B, C1, C2, D, E, & WyHS	Personal Information for All Programs
2	C1, C2, E & WyHS	Nutrition Risk Assessment
3	C2, E & WyHS	ADL's and IADL's
4	E & WyHS	New EP and Reevaluation 1 year on ACC to be done with every AGNES document for E and WyHS only – 1 year renewal from date EP starts the program
5	E & WyHS	Quarterly Reevaluation 1 (3 months after date of AGNES started)
6	E & WyHS	Quarterly Reevaluation 2 (6 months after date of AGNES started)
7	E & WyHS	Quarterly Reevaluation 3 (9 months after date of AGNES started)

# AGNES - Summary by Program

Programs	Pages	Collection
<b>B</b>	1	Personal Information
<b>C1</b>	1 – 2	Personal Information & Nutrition Risk Assessment
<b>C2</b>	1 – 3	Personal Information, Nutrition Risk Assessment & ADL's and IADL's
<b>D</b>	<b>1</b>	<b>Personal Information</b>
E	1 – 7	PI, Nutrition Risk Assessment, ADL's and IADL's, Annual ACC and Quarterlies  <b>AGNES is only for the care receiver or loved one and NOT the EP.</b>
<b>WyHS</b>	1 – 7	PI, Nutrition Risk Assessment, ADL's and IADL's, Annual ACC and Quarterlies

# AGNES - Key Policies

Programs	Pages
<b>B</b>	1
<b>C1</b>	1 – 2
<b>C2</b>	1 – 3
<b>D</b>	<b>1</b>
E	1 – 7
<b>WyHS</b>	1 – 7

- **A highlighted program is one that requires an AGNES to be admitted to the program (please see disclaimer on next slide).**
- **A non-highlighted program does not require an AGNES, so there may be no assessment on record needed for caregiver AGNES, but there may be quarterlies for E.**
- **For D, those people who are doing D via the senior center DO need an AGNES... WyCOA they do their D program, they do not have to have their people fill out an AGNES.**

# AGNES - Key Policies

- **If the Eligible Participant (EP) does not want to fill in an AGNES they do not have to BUT the legal minimum we need is the name of person, gender and DOB in the system and on that AGNES. These will be entered as aggregates.**
- **If anyone has not filled in the AGNES, the CLS Program Managers, Database Administrators and Senior Center Directors will have a conversation, and the Program Manager will direct the process for handling non-AGNES EP's (especially for Nutrition Programs, for example)**
- **The AGNES is renewed annually.**



# **Wellsky A&D (Aging & Disability) Data Management System**

***Aging Division  
Community Living Section***



# WellSky A&D (Aging & Disability)

- WellSky A&D (mostly known as A&D or WellSky) is the Aging Division's software that is used to record client demographics, OAA service usage, and to monitor OAA funded programs.
- A&D helps your organization achieve integration of data and meaningful, comprehensive care planning.
- All providers of OAA/AoA funded programs must use the A&D software.
- The first license for each provider is paid for by the Aging Division; additional licenses can be purchased but must be paid for by the provider.
- A&D training is currently being updated – check out the Community Living Section website under Provider Resources for video tutorials.

# WellSky A&D

## Information from A&D is used by the:

- **Aging Division, for:**
  - Quality Assurance
  - Provision of information to the Legislature and other interested parties
  - Budgeting and management of funds
  - Oversight of care plans
  - Other statistical, fiscal, and management information
- **Federal Government, for:**
  - Validation of funding and services
  - Requests to Congress for funding

# WellSky A&D - The Importance of Data Accuracy

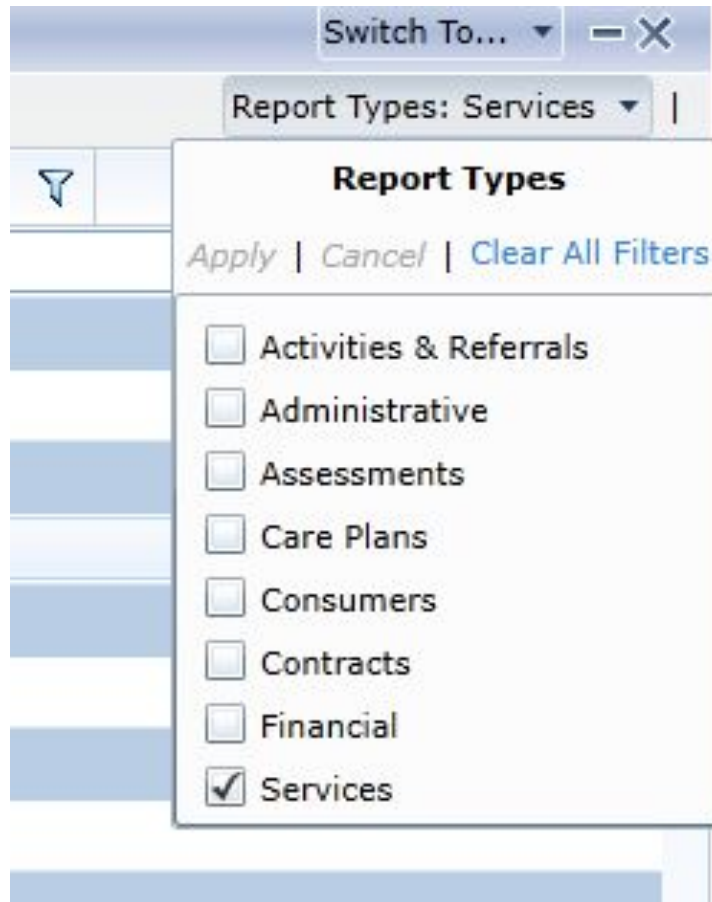
**Without good accurate information we are unable to get the figures that we need to apply for the federal grant. It is vital to keep your computer system up to date so you can use A&D.**

**It is also important to keep the data up to date, and on time, to ensure smooth flowing of funds and services.**

# WellSky A&D Report Generation

**Reports are generated in A&D using the reports tab on the main loading screen. From there you select “consumer types” as services and then “Agency Summary Report”. In the definition section, select 2021 in the title filter section to pull up all reports pre-made for the correct programs, where you can select just your provider office. These reports are manually updated every month by CLS so you never have to worry about missing the next months dates. Remember, never save anything you change on the report... that’s our job!**

# WellSky A&D Report Types



The screenshot shows a software interface for selecting report types. At the top, there is a 'Switch To...' dropdown menu and a close button. Below this is a 'Report Types: Services' dropdown menu. A 'Report Types' dialog box is open, displaying a list of report categories with checkboxes. The 'Services' category is selected with a checkmark. The dialog box also includes 'Apply', 'Cancel', and 'Clear All Filters' buttons.

Switch To... ▾

Report Types: Services ▾

**Report Types**

Apply | Cancel | Clear All Filters

- ☐ Activities & Referrals
- ☐ Administrative
- ☐ Assessments
- ☐ Care Plans
- ☐ Consumers
- ☐ Contracts
- ☐ Financial
- ☒ Services

# WellSky A&D - Agency Summary Report

Sorted By Title

Row Actions	Type	Title	Description
+	Services	Agency Summary Report	Summary Report showing Service Delivery
+	Services	Agency Summary Report - New Consumers	Summary Report showing Service Delivery
+	Services	Agency Summary Report (Totals Only)	Totals only report showing Service Delivery
+	Services	clientsites	





# WellSky A&D Report Definitions

Report Definitions		
Sorted By Last Updated (Filtered)		
Row	Actions	Title
		2020 COVID-19 Take Out and Delivery Report
		2020 Title III B Quarterly Report
		2020 Quarterly-Unduplicated counts by Care Program
		2020 Quarterly C1 plus COVID-19 - Unduplicated count by Care Program
		2020 MONTHLY IIIB - Aggregate and Unduplicated count by Care Program with COVID-19
		2020 WyHS Quarterly - Unduplicated Count
		2020 MONTHLY C1 - Unduplicated Count
		2020 IIIE ORC End of Year - Poverty Status
		2020 IIIE ORC End of Year - Live Alone Status

# WellSky A&D Reports and How To Read Them

**The typical A&D reports will be PDF files generated with the numbers of either consumers and their subsequent tallies (you will rarely if ever use this feature) and service deliveries and their tallies (the usual report).**

**Let's take some time to review how to read these reports so you are set up for success.**

# WellSky A&D Reports - Choosing a Good Title

## Agency Summary Report

10/22/2020

- 2020 MONTHLY IIIB - Aggregate and Unduplicated count by Care Program with COVID-19

Report Comments:

**Always save your PDF version (not the original report fields you got it from) as an easy to understand sentence of what the report is about. Include - Programs, Dates, Special Parameters. You should tell from the title what will be inside.**

**Also pay special note to the date generated, as it will help you see which version has the most accurate information if you pull the same report twice.**

# WellSky A&D Reports and the Parameters List

## Parameters List:

### Report:

**Print Parameters:** Selected Only  
**Sort By:** Last Name  
**Totals by Agency:** Yes  
**Group By:** No Grouping  
**Group per Page:** No  
**Sub Group By:** Service Category  
**Group and Subtotal by Service Month:** No  
**Show Consumers:** No  
**Show Client ID:** No  
**Show Monthly Details:** No  
**Show Subservice Totals:** Yes  
**Show Consumer Subtotals:** No  
**Show Daily Details:** No  
**Include Consumer Groups:** Yes  
**Service Date Details to Include:** (All)  
**Service Caregiver/Care Recipient Details to Include:** (All)

### Service Delivery:

**Service Start Date (on or after):** 09/01/2020  
**Service End Date (on or before):** 09/30/2020  
**Agency:** Wyoming State Division on Aging  
**Care Program/Service:** 20 items

You can amend these in A&D to get sortings by page for different programs, and different ways of filtering services and consumers.

Provider name will go under here.

The reason why we don't ask you save the report that everyone uses if you change something, is that we have pre-selected all the right fields for each program. B has 20, and if you don't know which 20 are the correct ones, do not save changes in A&D.

# WellSky A&D Reports and Service Delivery Types

Agency: **Wyoming State Division on Aging**

— **Service Category: Health Services**

Service: **Health Educations - Check Funding Source**

Subservice: **(No Subservice)**

Subtotal for Subservice:	79 / 0	110.00	\$0.00
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Subservice: **General Health Education**

Subtotal for Subservice:	5 / 0	13.00	\$0.00
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Subtotal for Service:	84 / 0	123.00	\$0.00
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Service: **Health Exercises - Check Funding Source**

Subservice: **(No Subservice)**

Subtotal for Subservice:	69 / 0	367.00	\$0.00
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Subservice: **Exercise Rooms**

Subtotal for Subservice:	134 / 0	852.00	\$0.00
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Subtotal for Service:	203 / 0	1,219.00	\$0.00
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Service: **Health Treatment & Preventions - Check Fund Source**

Subservice: **(No Subservice)**

Subtotal for Subservice:	171 / 0	214.25	\$0.00
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Subservice: **Clinics**

Subtotal for Subservice:	88 / 0	130.00	\$0.00
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Subservice: **Health Screenings**

Subtotal for Subservice:	5 / 0	5.00	\$0.00
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Subtotal for Service:	253 / 0	349.25	\$0.00
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Subtotal for Service Category:	513 / 0	1,691.25	\$0.00
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# WellSky A&D Reports and Grand Totals

Service: <b>Transportations</b>			
Subservice: <b>(No Subservice)</b>			
Subtotal for Subservice:	34 / 0	175.00	\$0.00
Subservice: <b>Locals</b>			
Subtotal for Subservice:	10 / 0	75.00	\$0.00
Subservice: <b>Out-of-Town Trips</b>			
Subtotal for Subservice:	15 / 0	25.00	\$0.00
Subtotal for Service:	55 / 0	275.00	\$0.00

\* Consumer counts are distinct over group totals. Grand Total represents the distinct count of consumers served.

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## Agency Summary Report

Service Period: From 9/1/2020 to 9/30/2020

10/22/2020

### - 2020 MONTHLY IIIB - Aggregate and Unduplicated count by Care Program with COVID-19

	* Consumers/ Consumer Groups	Units	Cost
Agency: <b>Wyoming State Division on Aging</b>			
Subtotal for Service Category:	93 / 0	496.00	\$0.00
Total For Agency:	6,005 / 7,721	51,218.75	\$290.00
Grand Total:	6,005 / 7,721	51,218.75	\$290.00

# WellSky A&D (Aging & Disability) Summary

- This does not supercede A&D training with Jeanne Scheneman and Mark Kelly, and if you require more in depth information contact the Aging Division to set up a training session.
- Subscribe to <https://adtrust.wellsky.com/> for updates on system wide issues and when they are resolved from the centralized WellSky offices.



# Contact Us

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