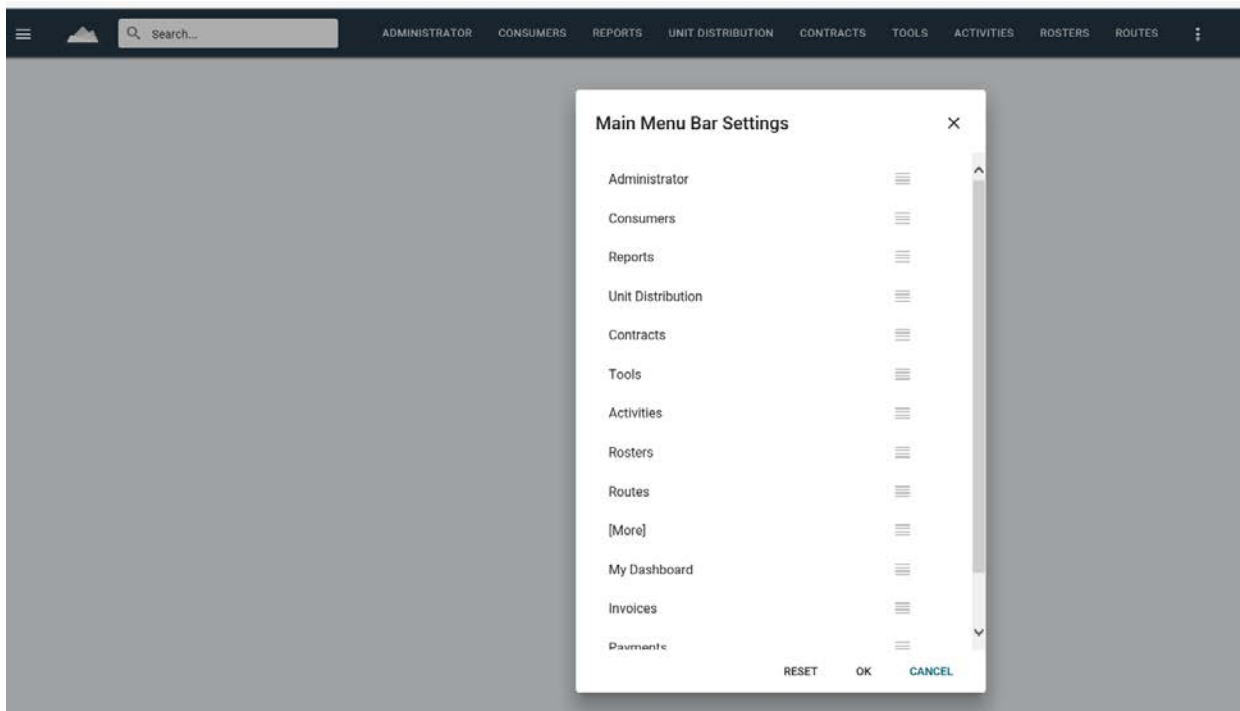


# How to Create a Roster in WellSky

Get to the Main Menu in WellSky



Use drop down to rearrange Main Menu if needed

Click on Roster

[illegible]

Click on Add New

**Roster Definition -**

Save | Save and Close | Close | Print | Open Audits | Show Preview |

OK | Expand All | Collapse All

**Roster**

Name:  Type: Multi-Service

Care Program:  Agency: 1\_Council on Aging of Southwestern Ohio

Provider:  Site:

Based On: (Any)

Roster Filters (2/15)

Service Filters (0/17)

Route (0/1)

**Services**

Setup Roster,

Roster Filters

Service Filters

**Roster Definition -**

Save | Save and Close | Close | Reject Changes | Print | Open Audits | Show Preview |

OK | Expand All | Collapse All

**Roster**

Name:  Type: Specified Service

Care Program: Traditional OAA Agency: 1\_Council on Aging of Southwestern Ohio

Provider:  Site:

Based On: Service Delivery

Roster Filters (2/15)

Last Name Is Like:  Consumer

**Services**

Congregate Meals Title III-C1

Dropdown Menu:

- Rosters
- Routes
- My Dashboard
- Invoices
- Payments
- Saved Searches
- Menu Settings

Setup Roster, Roster name is important for identification and location. Start name with PSA1 Provider Name Site

**Roster Definition -**

Save | Save and Close | Close | Reject Changes | Print | Open Audits | Show Preview |

OK | Expand All | Collapse All

**Roster**

Name:  Type: Specified Service

Care Program: Traditional OAA Agency: 1\_Council on Aging of Southwestern Ohio

Provider:  Site:

Based On: Service Delivery

**Services**

Congregate Meals Title III-C1

**Roster Definition -**

Save | Save and Close | Close | Reject Changes | Print | Open Audits | Show Preview |

**Roster Filters (2/15)**

Last Name Is Like:  Consumer: (Any)

Care Program (Not Enrolled): (Any) Default Agency: (Any)

Default Provider: (Any) Consumer Provider: (Any)

Primary Care Manager: (Any) Consumer Care Manager: (Any)

Residential Town: (Any) Residential ZIP Code: (Any)

Residential County: (Any) Residential Municipality: (Any)

Include Inactive Consumers: No Include Consumer Group: No

Consumer Fund Identifier: (Any)

**Service Filters (4/17)**

**Service Filters (4/17)**

Care Program (Any)	Care Program/Service (Any)
Service Agency (Any)	Service Congregate Meals
Subservice (Any)	Provider [REDACTED]
Subprovider (Any)	Site [REDACTED]
Service Fund Identifier (Any)	Day Range Within last six months.
Start Date Enter date	End Date Enter date
Care Plan Status (Any)	Care Plan Reason (Any)
Service Plan Status (Any)	Service Plan Reason (Any)
Place Of Service (Any)	

ADMINISTRATOR   CONSUMERS   REPORTS   UNIT DISTRIBUTION   CONTRACTS

Select Service

(All)	Description	OK
AB	***Wait List: Alzheimer's Respite	Select All
CD	***Wait List: Care Coordination Program	Deselect All
EF	***Wait List: Family Caregiver Program	Cancel
GH	911 Cell Phone	
II	AAA Administration	
KL	AAARD/LD	
MN	Access Assistance (HIE)	
OP	ACCOA Membership	
QR	Administration	
ST	Adult Day Service	
UV	Adult Day Service - Basic	
WX	Adult Day Service - Enhanced	
YZ	Adult Day Service - Intensive	
	Adult Development	
	Adult Development - County	
	Age Friendly Home Repair	
	Alz Core Care Community Coaching	
	Alz Core Care Consultation 1	
	Alz Core Care Consultation 1 - Rate 2	
	Alz Core Care Consultation 1 - Rate 3	
	Alz Core Care Consultation 1 - Rate 4	
	Alz Core Care Consultation 2	
	Alz Core Care Consultation 2 - Rate 2	

Number of selected items: 1/456

☐ Selected items only  
☐ Hide inactive records

Select Services

Select Provider Name

Select Site

(All)	Description	OK
AB	#110 Home-Delivered	Select All
CD	#111 Londontown	Deselect All
EF	#113 Georgetown Village	Cancel
GH	#116 Rainbow Apartments	
II	#117 Sunbury Park	
KL	#118 Park Avenue Senior Center	
MN	#119 Senior Enrichment Center	
OP	#120 Ashley Villa	
QR	#121 St. Michael's Community	
ST	#123 Ross Street Community Center(SWC)	
UV	#124 SourcePoint Cafe at White Lily Chape	
WX	#200 Sister Lucille's Place (Olivedale)	
YZ	#201 Amanda	
	#202 Samaritan Center	
	#203 Windsor	
	#204 Baltimore (Walnut Creek Village)	
	#205 Pleasantville	
	#207 Bremen (St. Mary's)	
	#211 Mt. Pleasant Place	
	#212 Fairfield Center for Disabilities	
	#213 Pleasant View	
	#214 Grand Haven	
	#215 Livingston Arms	

Number of selected items: 1/1542

☐ Selected items only  
☐ Hide inactive records

Select Site

Details

Roster Definition - [REDACTED]

Save | Save and Close | Close | Reject Changes | Print | Open Audits | Show Preview |

No

No

Consumer Fund Identifier

(Any)

Service Filters (4/17)

Care Program

(Any)

Service Agency

(Any)

Subservice

(Any)

Subprovider

(Any)

Service Fund Identifier

(Any)

Start Date

Enter date

Care Plan Status

(Any)

Service Plan Status

(Any)

Place Of Service

(Any)

Care Program/Service

(Any)

Service

Congregate Meals

Provider

[REDACTED]

Site

[REDACTED]

Day Range

Within last six months.

(None)

Within the current service roster month.

Within the current service roster month and the month prior.

Within last three months.

Within last four months.

Within last five months.

Within last six months.

Within last seven months.

Within last eight months.

### Select Day Range

Save

Close