How to Create a Roster in WellSky

Get to the Main Menu in WellSky

=	Q Search.	ADMINISTRATOR CONSUMERS REPORTS	UNIT DISTRIBUTION CONTRACTS TOOLS ACTIVITIES RO	ISTERS ROUTES	59:55 😫
=	Q search	ADMINISTRATOR CONSU	IMERS REPORTS UNIT DISTRIBUTION CONTRA		
			Main Menu Bar Settings	×	
			Administrator	= ^	
			Consumers	=	
			Reports	=	
			Unit Distribution	=	
			Contracts	=	
			Tools	=	
			Activities		
			Rosters		
			Routes	=	
			[More]		
			My Dashboard	= -	
			Invoices	=	
			Paymente	OK CANCEL	
			nese i	or or or or other	

Use drop down to rearrange Main Menu if needed

Click on Roster

1 🖌	Q Search	ADMINISTRATOR C	ONSUMERS R	EPORTS UNIT DISTRUBUTIO	N CONTRACTS TO	OLS ACTIVITIES	ROSTERS ROUTES		59:56 😫
Roster	r Definitions								Switch To • -
Sorted By P	Provider (Filtered)					Add time Open	Record Roster Delete Copy Print	Permat Columns Print Grid Rel	fresh Expert Grid Open Au
Row Actions	Name	Service Fillers Based On S	Тура 🌱	Agency	Provider *	T Care Program	Y Service	😵 Subprovider 🎖	
	MOW Sharonville Congregate	Service Delivery	Specified Service	1_Council on Aging of Southwestern	OF MOW of SW OH & NRCY	Traditional OAA	Congregate Meals		
	COVID Shell Stable 14-day box Sharonville	Senrice Delivery	Specified Service	1_Council on Aging of Southwestern	OF MOW OF SWICH & NKY	Traditional OAA	Home Delivered Mnail	i - Rate 3	
	MOW Trimity Manor Congregate	Service Delivery	Specified Service	1_Council on Aging of Southwestern	OF MOW of SW OH & NKY	Traditional OAA	Congregate Meats		
	COVIO Sheet Statue 14-itay box - Maple Towers	Stervice Delivery	Specified Service	1_Council an Aging of Southwestern	OF NOW OF SW OH & NKY	Predbonel OAA	Home Delivered Mean	- Rate 3	
	M P DOVID Frazen/Daily Meats - 55 Nonth	Service Delivery	Specified Service	1_Council on Aging of Southwestern	OF MOW & SW OH & NKY	Traditional QAA	Home Delivered Meal	I - Rate 2	
	KOW West Chesser Congregola	Service Delivery	Epecties Service	1_Council on Aging of Southwestern	DI MOW OF SWICH & NRY	Traditional OAA	Congregate Meets		
	MOW MdPointe Library, Monroe Congregate	Service Delivery	Specified Service	LCouncil on Aping of Southwestern	OF MOW of SW OH & NKY	Itadbonal QAA	Congregate Meats		
	K MOW Booth Congregate	Service Delivery	Toeched Service	1_Council on Aging of Southwestern	DI MOW of SW OH & NKY	Traditional OAA	Congregate Meets		
	COVID Shell States 14-day box - MameCeves	Service Delivery	Specified Service	1_Council on Aging of Southwestern	OF MOW of SW OH & NKY	Fradbonal OAA	Home Delivered Meal	- Rate 3	
2 - 1	MOW Anderson Congregate	Service Delivery	Ipecified Dervice	1_Council on Aging of Southwestern	OF MOW 6FSW OH & NRY	Traditional GAA	Congregate Meats		

Click on Add New

=	E A Search	ADMINISTRATOR	CONSUMERS	REPORTS	UNIT DISTRIBUTION	CONTRACTS	т
nal	tin Roster Definition -						
il upe	Save Save and Close Close Print - Open Audits She	ow Preview					
кеселлу орелеа	OK Expand All Collapse All					Services	
MOI N IOM		Type Multi-Service		-			
4	Care Program	Agency 1_Council on Aging of Southwester	rn Ohio	•			
	Provider	Site		-			
	Based On (Any)						
	Roster Filters (2/15)						
	Service Filters (0/17)						
	✓ Route (0/1)						

Setup Roster,

Roster Filters

Service Filters

Q Search	ADMINISTRATOR CONSUMERS	REPOR	TS UNIT DISTRIBUTION CONTI	RACTS TOOLS A	CTIVITIES	
Roster Definition -					Rosters	Ì
ave Save and Close Close Reject Cl	hanges Print • Open Audits Show Preview					
OK Expand All Collapse All			Services		Routes	1
Roster			📴 🛪 Congregate Meals	Title III-C1	My Dashboard	
Name	Туре				2	
	Specified Service	•			Invoices	
Care Program	Agency					
Traditional OAA	 1_Council on Aging of Southwestern Ohio 	•			Payments	
Provider	Site				100000000000000000000000000000000000000	
	•	•			Saved Searches	1
Based On						
Service Delivery	÷				Menu Settings	

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

Roster Definition -		Ang dang						Switch To •
rve Save and Close Close Rej	ect Changes Print •	Open Audits Show Preview						
OK Expand All Collapse All				Services			Add N	lew Open Delete
Roster				😂 🛪 Congregate Meals	,	fitle III-C1		
Name		Туре						
Beensering and		Specified Service	•					
Care Program		Agency						
Traditional OAA			• •					
Provider								
			1.1					
Based On Service Delivery		÷.						
ster Definition -								Switch To
oster Definition -	Changes Print •	Open Audits Show Preview		11				Switch To
Server Astronomical Contraction	Changes Print +	Open Audits Show Preview Consumer						Switch To
Save and Close Close Heject (Roster Filters (2/15)	Changes Print •		a ×					Switch To.,
Save and Close Close Heject (Roster Filters (2/15) Name Is Like	Changès Print +	Consumer						Switch To
Save and Close Close Heject / Roster Filters (2/15) Name Is Like Program (Not Enrolled)	Type specified Service 1_Council on Aging of Southwestern Ohio Site Set Changee: Print + Open Audits Show Preview ect Changee: Print + Open Audits Show Preview ect Changee: Print + Open Audits Show Preview ect Changee: Print + Open Audits Show Preview	Switch To						
Save and Close Close Heject / Koster Filters (2/15) Name Is Like Program (Not Enrolled)		Consumer (Any) Default Agency (Any)	₩ *					Switch To
Save and Close Close Reject / Koster Filters (2/15) Iame Is Like Program (Not Enrolled)) It Provider) 🗠 ×	Consumer (Any) Default Agency (Any) Consumer Provider	₩ *					Switch To
Save and Close Close Reject / Koster Filters (2/15) kame Is Like Program (Not Enrolled)) It Provider) 🗠 ×	Consumer (Any) Default Agency (Any) Consumer Provider (Any)	- ×					Switch To
Save and Close [Reject / koster Filters (2/15) warne is Like Program (Net Enrolled)) is Provider) ry Care Manager	» × ۵ ×	Consumer (Any) Default Agency (Any) Consumer Provider [(Any) Consumer Care Manager	- ×					Switch To
Save and Close [Reject / coster Filters (2/15) Varme Is Like Program (Net Enrolled)) it Provider) ry Care Manager)	» × ۵ ×	Consumer (Any) Default Agency (Any) Consumer Provider (Any) Consumer Care Manager (Any)						Switch To
Save and Close [Close] Heject / Koster Filters (2/15) Name Is Like Program (Not Enrolled))))))))))))))	а х а х а х а	Consumer (Any) Default Agency (Any) Consumer Provider (Any) Consumer Care Manager (Any) Residential ZIP Code						Switch To
Save and Close [Close] Heject / Koster Filters (2/15) Name Is Like Program (Not Enrolled))))))))))))))	а х а х а х а	Consumer (Any) Default Agency (Any) Consumer Provider (Any) Consumer Care Manager (Any) Residential ZIP Code (Any)						Switch To
Sover and Clove [Reject : koster Filters (2/15) arme is Like Program (Net Enrolled)) the Provider) ry Care Manager) ential Town) ential County		Consumer (Any) Default Agency (Any) Consumer Provider (Any) Consumer Care Manager (Any) Residential ZIP Code (Any)	- x					Switch To
Save and clove [clove] #riject : koster Filters (2/15) warne is Like Program (Net Enrolled)) it Provider) ry Care Manager) ential Town) ential County)		Consumer (Any) Default Agency (Any) Consumer Provider (Any) Consumer Care Manager (Any) Residential ZIP Code (Any) Residential Municipality (Any)	- x					Switch To
Save and clove [clove] #riject : koster Filters (2/15) warne is Like Program (Net Enrolled)) it Provider) ry Care Manager) ential Town) ential County)		Consumer (Any) Default Agency (Any) Consumer Provider (Any) Consumer Care Manager (Any) Residential ZIP Code (Any) Residential Plunicipality (Any) Include Consumer Group	- x					Switch To
Save and Close Close Heject (Roster Filters (2/15)		Consumer (Any) Default Agency (Any) Consumer Provider (Any) Consumer Care Manager (Any) Residential ZIP Code (Any) Residential Plunicipality (Any) Include Consumer Group						Switch To

Care Program			Care Program/Service	
(Any)		🛁 📂 ≍	(Any)	😂 ×
Service Agency			Service	
(Any)		😂 🛪	Congregate Meals	🛶 💌
Subservice			Provider	
(Any)		😂 ×		😂 🗙
Subprovider			Site	
(Any)				🔛 🛪
Service Fund Identifier			Day Range	
(Any)			Within last six months.	*
Start Date			End Date	
Enter date			Enter date	
Care Plan Status			Care Plan Reason	
(Any)			(Any)	-
Service Plan Status			Service Plan Reason	
(Any)		-	(Any)	-
Place Of Service				
(Any)				



Select Services

Select Provider Name



Select Site

	nanges min	* 1	Open Audits Show Preview		_
No		-	No		
Consumer Fund Identifier					
(Any)		×			
Service Filters (4/17)					
Care Program			Care Program/Service		
(Any)		×	(Any) 📴 🛪		
Service Agency			Service		
(Any)		×	Congregate Meals		
Subservice			Provider		
(Any)		×			
Subprovider			Site		
(Any)		×	🛁 🖌		
Service Fund Identifier			Day Range		
(Any)	🕒 📄	×	Within last six months.		
Start Date			(None)		
Enter date			Within the current service roster month.		L
Care Plan Status			Within the current service roster month and the month prio	r. 😑	
(Any)		-	Within last three months.		
			Within last four months.		
Service Plan Status (Any)		•	Within last five months.		1
(Arry)			Within last six months.		

Select Day Range

Save

Close