

WELLSKY

# Point of Care app

## Clinician User Guide

*Best practices for using the mobile app in the field — from sign-in to submit.*

Home Health · Phone edition · v1.0 · 2026

WellSky Point of Care app · Clinician User Guide · v1.0 · 2026

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The WellSky Point of Care app brings the clinician’s daily field workflow into one mobile experience. The app combines the visit schedule, patient details, EVV-compliant check-in and check-out, documentation activities, progress to goals, wound care workflows, agency communication, WellSky Scribe, WellSky Extract, and WellSky SkySense AI capabilities. It is integrated with the WellSky Home Health platform clients already use today.

This guide is intended for clinicians transitioning from the standalone Scribe app to the integrated WellSky Point of Care app experience, where visit planning, documentation, AI-supported review, and field follow-up are completed in one mobile workflow.

## 1 · Starting Your Day

The WellSky Point of Care app is designed to support the full visit day from start to finish. A brief device check each morning can help avoid delays once you arrive at the patient's home.

1. Username and Password — use your same WellSky login information. This information is required on first sign-in and after a full sign-out.
2. Face ID or other biometric login unlocks the app if you've locked it during the day. Turn it on in **Settings** once and you will not have to retype your password between visits.



### BEST PRACTICE — MORNING DEVICE CHECK

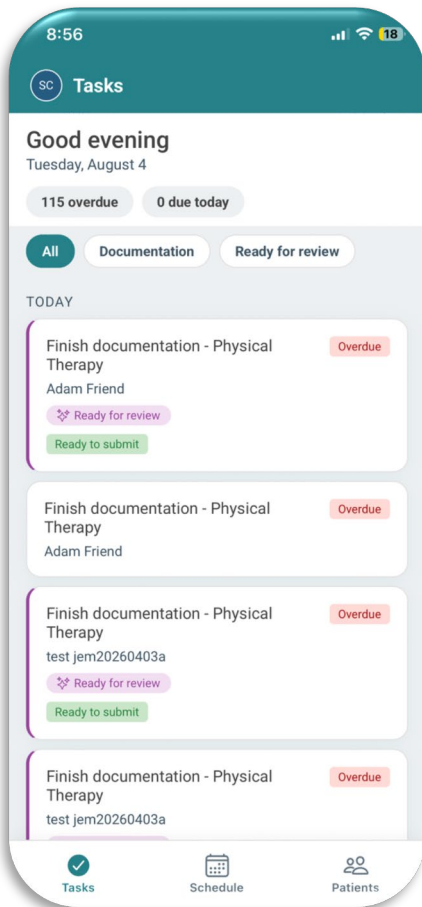
Before heading out, take a quick moment to make sure your device is ready for the day. Confirm the battery is above 50% or bring a charger, sign in and make sure the "Offline Mode" banner is not showing, and review your tasks so you know what still needs attention.

## 2 · Planning Your Day — Tasks, Schedule & Route

Each morning, three screens help you prepare for the day: **Tasks** for outstanding follow-ups, **Schedule** for today's visits, and **Patients** for quick reference and access.

### The Tasks Screen

1. The top banner shows the number of tasks that are overdue and due today.
2. Filter tasks by type (All, Documentation, Ready for review) to easily find what you are looking for.

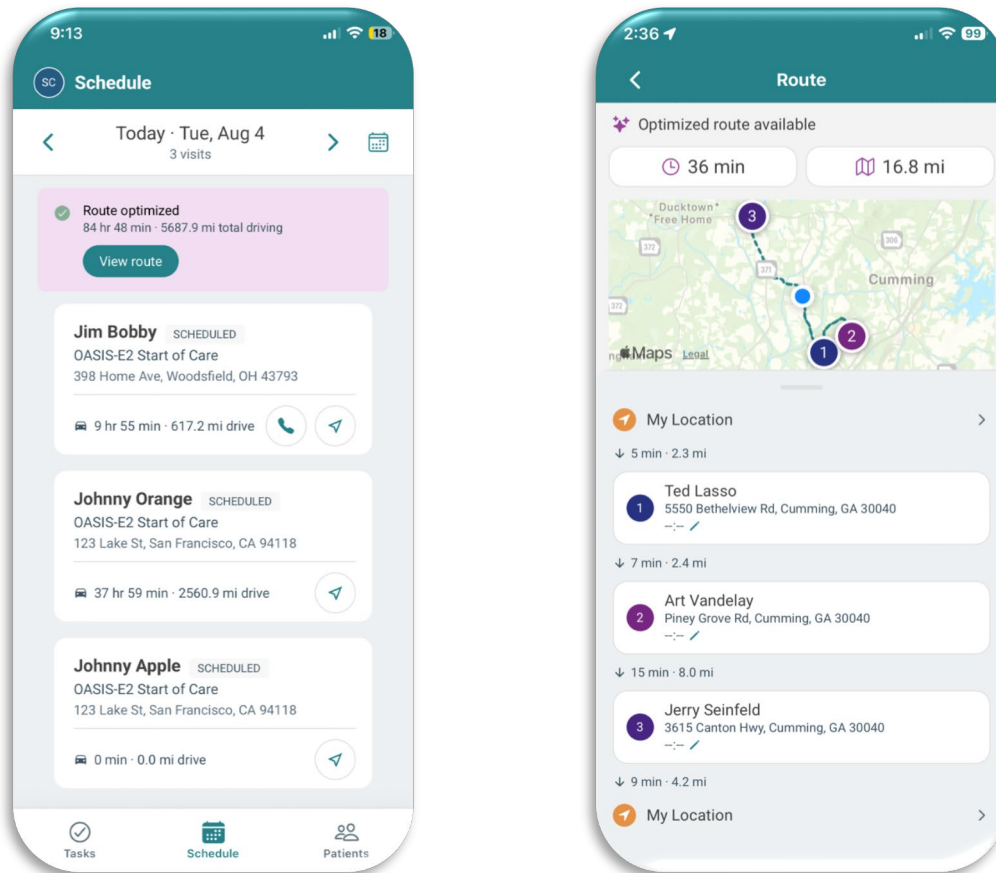


#### BEST PRACTICE — TASKS BEFORE SCHEDULE

When possible, review overdue and due-today tasks before your first visit. Taking care of urgent items early gives you a cleaner view of the day and may reduce follow-up reminders later in the morning.

## Schedule & Route Optimization

1. You can see your visits and visit types for today or quickly jump to another day by using the arrows or tapping the date to select a day from the calendar.
2. When WellSky sees a shorter drive order, an “**Optimized route available**” banner appears with the reduced time and miles.



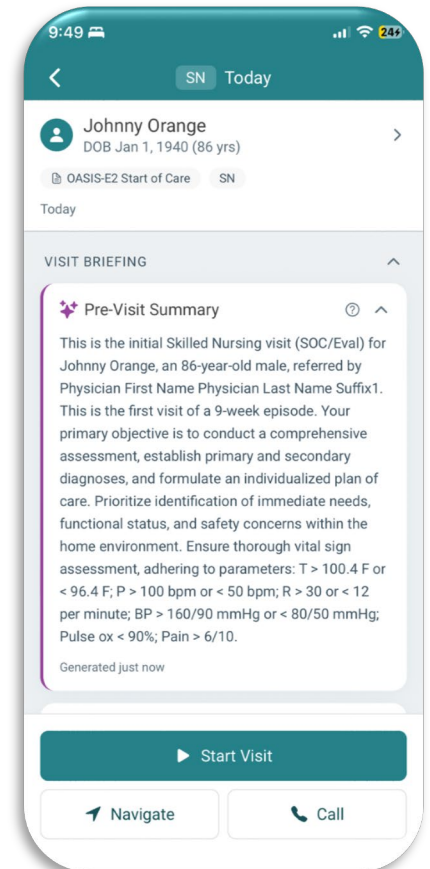
### BEST PRACTICE – TRUST BUT VERIFY THE ROUTE

The optimized route is a helpful starting point, but your clinical judgment and local knowledge still matter. If a patient needs an earlier visit, a caregiver is only available at a certain time, or you know road conditions may affect travel, adjust the visit sequence as needed before you head out.

### 3 · Visits in the WellSky Point of Care app

When you open a patient's visit tile, the app brings together the information and tools you may need before, during, and after the visit. Some features help you prepare with key patient context, while others support documentation and follow-up within the visit workflow.

1. Patient banner — this is persistent across every screen. If you ever want to confirm you are in the right chart, glance at the banner before continuing.
2. Visit Briefing Section
  - a. AI Pre-Visit Summary — 3–5 lines synthesized from recent records. Use it for orientation, then confirm clinically important details in the source record as needed.
  - b. Current Episode — shows where you are in the patient's certification period.
  - c. Last Visit — you can see who most recently saw the patient and what type of visit they completed, in case you need to contact them quickly.
  - d. Analytics — this provides details about the patient's hospitalization risk and hospice suitability, provided by Care Insights.
  - e. Medications — you can review the patient's medications at any time, as well as add additional medications using Med Extract.
  - f. Primary Provider — if your device has telephony abilities, you can call the patient's provider directly from this screen for easier communication.
3. Visit Activities — after you start the visit, use this section to document the skilled care provided to the patient. You can move in and out of these activities while Scribe is recording. These items are explained in more detail below.
  - a. Progress to Goals
  - b. Wound Care
  - c. Visit Documentation
  - d. WILA Post-Visit Documentation
  - e. Documents
  - f. Orders
  - g. Start Visit



**ABOUT THE AI SUMMARY**

**For SOC / First Visits:** The summary is generated from the referral packet — referral source, referring physician, referral and SOC dates, face-to-face date, primary/secondary diagnoses, caregiver info, and initial orders. It also includes episode info (payer, cert period).

**For Follow-up Visits:** The summary is generated from up to 5 previous visits within a 2-week lookback window, including clinician note summaries and missed-visit flags. It also includes episode info (cert period, visits used vs authorized), diagnoses, and care plan goal progress. The referral packet is not included.

The AI Pre-Visit Summary is a helpful starting point, but anything clinically critical, such as current medications or code status, should still be confirmed against the source record before acting.

**BEST PRACTICE — 3-MINUTE PRE-VISIT REVIEW**

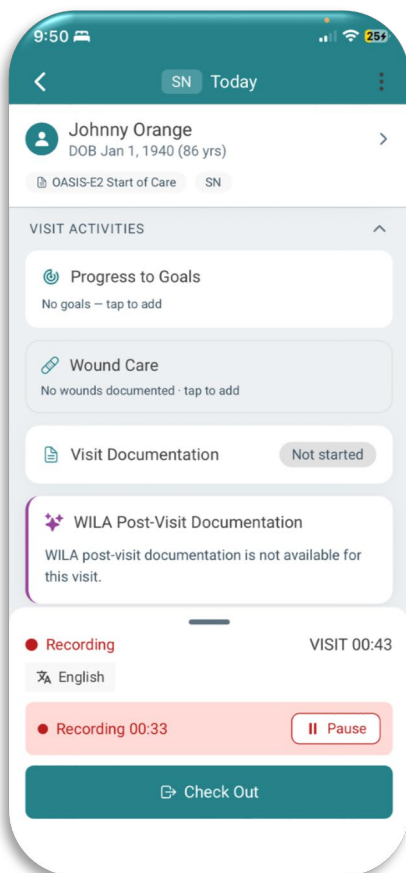
A short pre-visit review can make the visit feel smoother. Before checking in, take a few minutes to review alerts, skim the AI summary, and look over open orders or medication items so you can walk in prepared and ready to see your patient.

## 4 · Completing Visits

A visit begins with two key steps: Check In when you arrive at the patient's door, then Start Recording after you introduce yourself and explain the recording. Waiting until you are at the door helps keep the visit time accurate.

### Starting a Visit

1. Persistent recording strip — the red bar stays across every screen while the recording is occurring. If the recording is paused, you will see the strip change color and let you know the recording is paused.
2. Visit Timer — remains visible so you can see exactly how long the visit has been running. This supports billing and EVV accuracy.



#### BEST PRACTICE — RETURN TO THE PATIENT'S VISIT SCREEN

When moving between activities, returning to the main visit screen can help keep the workflow organized. It brings you back to the right patient context and helps ensure the recording continues as expected.

## WellSky Scribe (Ambient Listening)

WellSky Scribe is built into the WellSky Point of Care app—no separate sign-in is needed. It listens during the visit and creates draft responses for the relevant documentation sections. Treat all AI-generated content as a draft and review it before sending it to the EHR.

### Before You Start

1. Follow your agency's recording-consent process. Explain that ambient listening will help create a draft of the visit documentation, then obtain the required consent.
2. Select the visit language from the menu above **Start Recording**.
3. Place the device where it can hear you and the patient, reduce background noise, and turn on **Do Not Disturb** to avoid incoming calls if you are using a mobile device, that could interrupt the recording. If you need to accept a call, the recording will automatically pause; you will need to resume the recording when the phone call is complete.

### How to Talk During the Visit

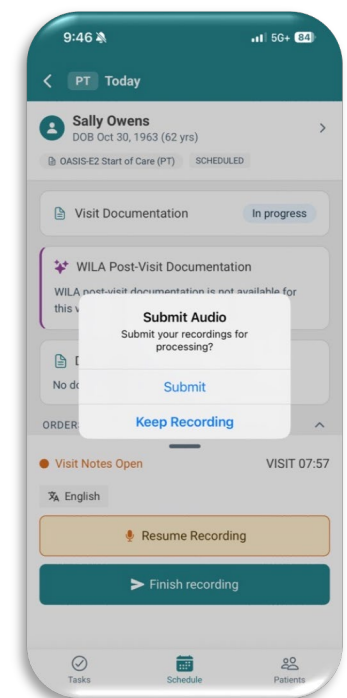
1. Speak naturally but say clinically important observations aloud so Scribe can capture them. Ambient listening supports documentation; it does not replace your clinical judgment or required assessment techniques.
2. Narrate objective findings while guiding the patient. For example: "Please stand and walk toward the bathroom using your walker. I notice you need a cue to lock the brakes and are not fully clearing your right foot."
3. If a finding is not natural to say during care, tell the patient you may briefly narrate observations after the activity.
4. For private observations, pause before leaving the home. In a private location, resume and dictate the remaining findings.

### Record the Visit

1. **Start:** Tap **Start Recording**. The recording strip stays visible as you move through visit activities.
2. **Pause:** Pause for private conversations or information that should not be recorded. Resume when you are ready.
3. **Stop and submit:** When finished, tap **Stop**, submit the recording, and confirm submission.

### For a Clear Recording

1. Use a strong Wi-Fi or cellular connection and keep the device close enough to hear both clinician and patient.
2. Reduce background noise and prevent calls from ringing on the recording device.
3. Use speakerphone when a provider or pharmacy call should be included in the recording. Note: you will only be able to record calls if you are using a separate device for recording than the device used to make calls.



4. Before leaving the workflow, confirm the recording is stopped and submitted.

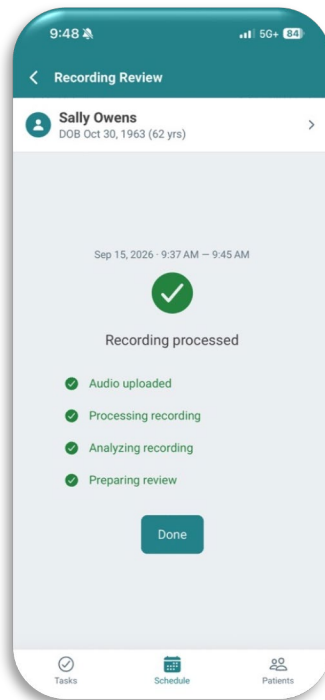
### After Submission

Scribe analyzes the recording and places draft responses in the relevant documentation sections. Processing typically takes about three minutes but may take longer with a slow or spotty connection.

### Review the Scribe Draft

1. Review each section and confirm every AI-generated response is clinically accurate.
2. Open incomplete sections and add or correct information. Turn on **Unanswered** to quickly find missing responses.
3. Tap View Evidence to view transcript evidence. Evidence helps explain the draft but does not replace clinical review.
4. Use the back arrow to return to the section list. When required items are complete, tap **Submit to EHR**.

*It may feel unfamiliar at first. Focus on speaking clearly, verbalizing key findings, and reviewing the draft; the workflow will become more natural with practice.*



## Progress to Goals

Goals appear as ON-TRACK, BEHIND, or IN-PROGRESS badges. Each agency's library is added to allow the clinicians to select their goals and develop the Care Plan accordingly.

2:14

< Progress to Goals

**Thackery Binx**  
DOB Oct 12, 1925 (100 yrs)

+ Create goal

CARE PLAN GOALS 0 of 1 documented

Unmet 1 Met 0 Not Attained 0

**Transfers**

Mobility Long-term Not Documented

Patient will Improve ability to safely transfer from Bed to Chair with Supervision to allow patient to Reduce burden on caregivers

0 performed of 2 interventions

Started: Sep 12 - Target: Oct 24 (36d)

Sep 12 Oct 24

Tasks Schedule Patients

2:14

< New Goal

Library Free form

LIBRARY GOALS (10) Search

All types Supportive Assistance Sensory Status

**(PT) Mobility - Bed Mobility**  
Patient will Improve / Stabilize ability to safely complete bed mobility with Enter Level of Assistance to Enter Functional Activity within Enter Time Frame

**(PT) Locomotion - Gait Capacity**  
Patient will Improve / Stabilize gait capacity as evidenced by the ability to ambulate with Enter Device and Assistance for Enter Distance to allow patient to Enter Functional Activity within Enter Time Frame

**(PT) Mobility - Transfers** Already assigned to patient  
Patient will Improve/Stabilize ability to safely transfer from Enter Surface to Enter Surface with Enter Level of Assistance to allow patient to Enter Functional Activity

**(PT) Balance / Fall Risk - TUG**  
Patient will Improve/Stabilize mobility as evidenced by a TUG Score of Enter Time seconds using Enter assistive device for in-home mobility without fall risk

Cancel Save & Exit Save & Continue

Tasks Schedule Patients

## Wound Care

1. Wounds can be added directly from the POC app, including taking photos and storing them in the WellSky Home Health EHR.
2. Because some wound fields are required, take a moment to confirm those sections are complete before moving on.

The image displays three sequential screenshots of the WellSky Point of Care (POC) app interface for wound care documentation.

**Screenshot 1: Wound Care Overview**  
 The screen shows the patient profile for Jim Bobby (DOB Feb 1, 1970, 56 yrs). Below the profile is a '+ New wound' button. Underneath, there are tabs for 'Active 0', 'Discontinued 0', and 'Deleted 0'. At the bottom, a medical bag icon indicates 'No wounds'.

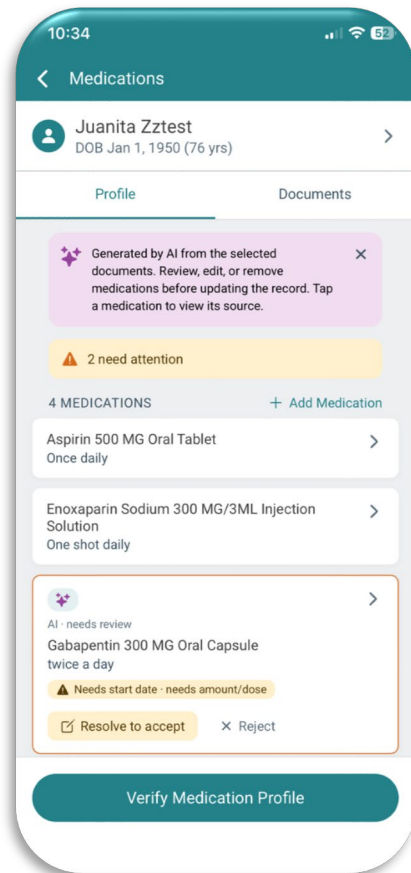
**Screenshot 2: New Wound Form (Part 1)**  
 This screen is titled 'New Wound'. It includes the following fields:  
 - **Pressure Injury Stage \***: Radio buttons for Stage 1, Stage 2, Stage 3, Stage 4 (selected), Unstageable, and Suspected Deep Tissue Injury.  
 - **Location \***: A text field with the placeholder 'Location (e.g. Left heel)'.  
 - **Onset date**: A date picker with the label 'Select onset date' and a calendar icon.  
 - **Present on admission**: A toggle switch.  
 - **Body diagram \***: Two anatomical diagrams of a human figure (front and back views) with 'L' for Left and 'R' for Right markers.  
 - **Required fields note**: 'Required: Location, Onset date or present on admission, Body diagram. Tap a name to jump to it.'  
 - **Buttons**: 'Cancel', 'Save & Exit', and 'Save & Add Care'.

**Screenshot 3: New Wound Form (Part 2)**  
 This screen continues the 'New Wound' form with the following fields:  
 - **Size (L x W x D) \***: A checkbox for 'Not applicable' and three input fields for Length (L), Width (W), and Depth (D).  
 - **Pain \***: A section titled 'Pain (0-10)' with a numeric keypad from 0 to 10.  
 - **Thickness**: A checkbox for 'Not assessed' and radio buttons for 'Full', 'Partial', '100% Epithelized', 'Unable to determine', and 'Other'.  
 - **Drainage \***: A text field.  
 - **Required fields note**: 'Required: Size, Pain, Drainage, Odor, Wound bed, Wound edge, Surrounding tissue, Undermining, Tunneling, Treatment this visit, Patient response to treatment. Tap a name to jump to it.'  
 - **Buttons**: 'Cancel' and 'Save'.

## Medication extract with WellSky SkySense AI

WellSky Extract (part of WellSky SkySense AI) can pull medication information from documents such as a discharge summary, medication list photo, family-provided pill bottle inventory, or other medication sources. It also flags items that need clinician's review.

1. AI banner — reminds you that the results are AI-generated and still need clinician review before they become part of the record.
2. Evidence icon — tap to review the source document or page the AI used for the medication information. Confirm the details before accepting them.
3. Flags — if Extract cannot identify required details, such as start date or frequency, the app shows a red flag so you can add or confirm the missing information.



### REVIEW SOURCE DETAILS BEFORE SUBMITTING

Review flagged medication items and source evidence before submitting. Confirm missing details, such as start date or frequency, against the medication source whenever possible so reconciliation is cleaner in the EHR.

## Visit Documentation

Visit Documentation is where you complete the assessment fields and visit-specific documentation required for the patient encounter. The sections shown are based on the visit type, so the app presents the items that need to be reviewed, answered, or confirmed during that visit.

To move through documentation, tap the menu icon in the upper-left corner to view all sections for the visit. From there, you can jump directly to a specific section, return to a section that still needs attention, or move through the visit in order.

**Time In / Time Out** — review these fields carefully because they support visit timing and billing-related workflow. Check In and Check Out capture the EVV timestamps, while the documentation fields give you a place to confirm or complete the visit time details required for the record.

**Mileage** — enter mileage when it is required by your agency workflow. Completing this information during or shortly after the visit can help keep travel details accurate while the route is still fresh.

You can answer documentation items manually as you move through the visit. You can also use the fields as a guide during the patient conversation by speaking naturally about the assessment details you need to capture, which can help Scribe generate more complete and accurate draft responses.

After Check Out and processing the recording, return to Visit Documentation and Encounter Review to validate all AI-supported content before submitting. Treat AI output as a draft: confirm clinical accuracy and accept correct responses, edit anything incomplete or incorrect, and complete all required fields while the visit details are still fresh.

For the most consistent experience, start and complete the visit workflow in the Point of Care app when you want mobile documentation and AI-supported prefill to be available. Starting documentation elsewhere may limit what is available to review or prefill inside the mobile workflow.

When prior-visit documentation is available for a field, use it as a reference point to identify changes in the patient's status. Compare the prior response with what you observe during the current visit, then update the field to reflect the patient's current condition.

The screenshot shows the 'Visit Documentation' screen in the WellSky Point of Care app. At the top, the patient's name 'Johnny Apple' and 'Documentation - Yesterday' are displayed, along with a status 'All changes saved'. Below this is a search bar and a filter bar with options: 'All', 'Incomplete (1072)', 'AI-filled', and 'Conflicts'. The main content area is divided into two sections. The first section, 'FUNCTIONAL STATUS', contains a text description: 'Current ability to walk safely, once in a standing position, or use a wheelchair, once in a seated position, on a variety of surfaces.' and a dropdown menu labeled 'Select...'. The second section, 'MAHC 10 - FALL RISK ASSESSMENT TOOL', includes a patient age 'Age 65+' and several assessment items, each with '1: Yes' and '0: No' radio buttons. These items are: 'Diagnosis (3 or more co-existing)', 'Prior history of falls within 3 months', 'Incontinence', and 'Visual impairment'.

### BEST PRACTICE — FINISH DOCUMENTATION IN THE HOME

When time allows, complete documentation and review AI-supported responses before leaving or before ending the day. Finishing while details are fresh helps reduce rework, supports accuracy, and allows offline work to sync automatically when coverage returns.

### BEST PRACTICE — ACCURACY OVER SPEED ON OASIS

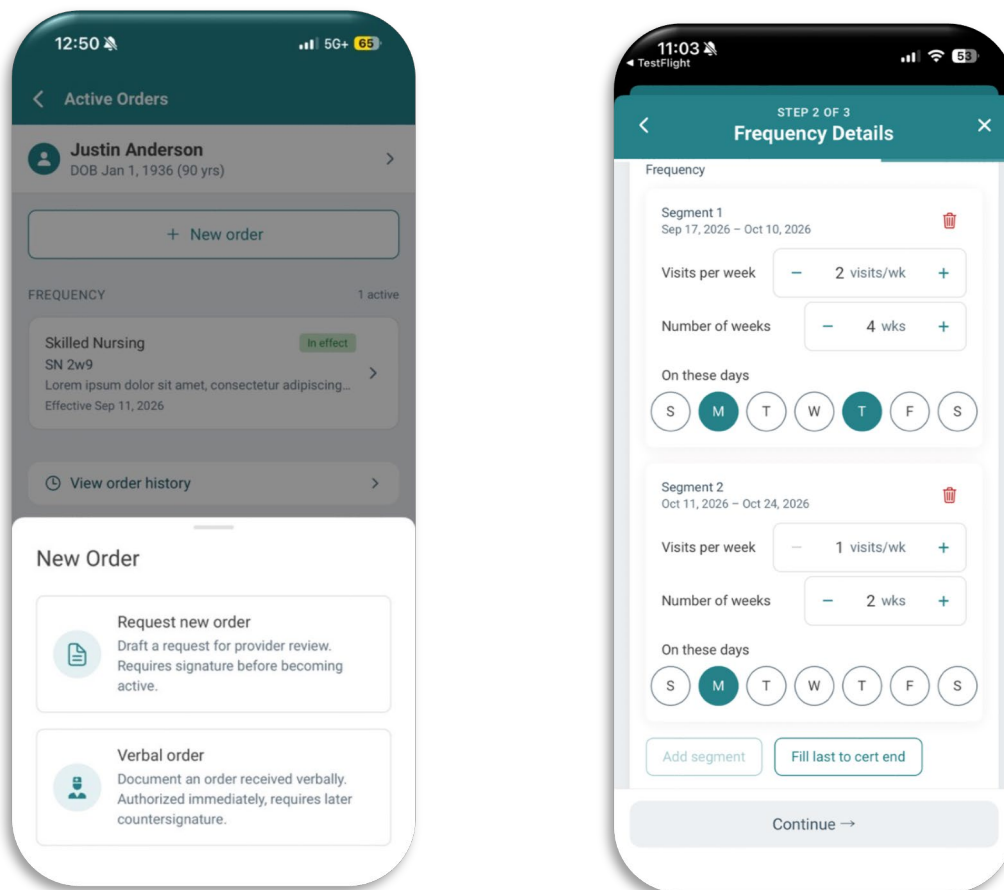
Taking a little extra time on OASIS entries can prevent rework later. Because OASIS information affects reimbursement and quality reporting, it is worth pausing to confirm key "M" item responses before moving on.

## Post-visit documentation with WellSky Intelligent Language Assistant (WILA)

After your WellSky Scribe recording has been submitted and processed, you can request a call from the WellSky Intelligent Language Assistant (WILA) to review outstanding documentation items. WILA is available only after the recording has finished processing.

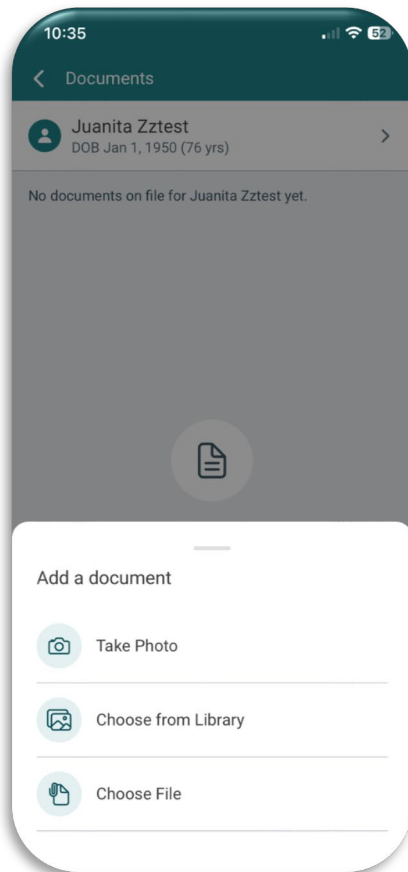
### Orders

Use Orders when you need to view an existing order or create a new one in the field, to change a frequency or add a PRN visit. If physician sign-off is needed, tap **Call Physician** so the call is placed from within the visit and captured against the encounter.



## 5 · Capturing Documents (Attachments)

Use the Documents section to capture photos or upload documents into the patient's medical record. This can include paper items such as consent forms, insurance cards, DME order slips, family-maintained medication lists, or hospital discharge paperwork.



| Option              | When to use it                                                                                           |
|---------------------|----------------------------------------------------------------------------------------------------------|
| Take Photo          | Single-page items: insurance card, consent form, one-page med list. Fastest option.                      |
| Choose from Library | Something a family member already photographed and texted you — pull it in from the phone's camera roll. |
| Choose File         | A document already saved, e.g., a PDF sent to you.                                                       |

### BEST PRACTICE — CAPTURE ON VISIT ONE

If documents are available during the first visit, capturing them right away can save time later. Insurance cards, consent forms, HIPAA acknowledgments, and advance directives are easier to collect while you are already with the patient or family.

### RENAME BEFORE YOU LEAVE

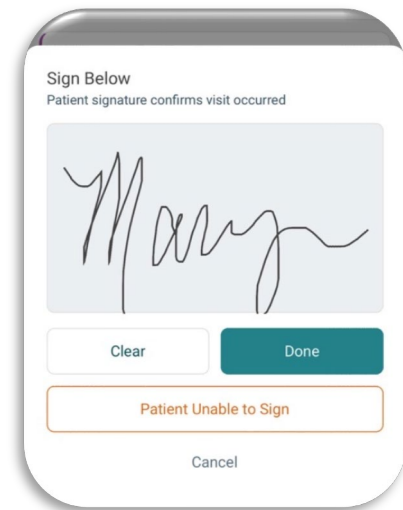
Clear file names are much easier to understand later than default photo names. When you capture a document, take a moment to rename it while the context is fresh, such as "Consent — signed," "BCBS front," or "Discharge packet Banner Estrella 7/10."

## 6 · Wrapping Up the Visit

Close the visit in this order: capture the patient signature, check out, stop and submit the recording, review the AI-generated answers, then submit the completed visit to the EHR.

### 1. Capture the Patient Signature

1. Tap **Capture Signature** and have the patient sign. The app automatically includes the patient's name and date.
2. If the patient cannot sign, select **Patient unable to sign** and document the reason.



### 2. Check Out

Tap **Check Out** when the visit is complete. This stops the EVV clock, so confirm Check Out before moving to the next visit.

### 3. Complete and Submit the Recording

1. Stop the recording, then submit and confirm it.
2. The app creates a transcript and draft answers in the background. You may move on and return when notified that processing is complete.

### 4. Review AI Answers and Submit to the EHR

1. Open Encounter Review when processing is complete.
2. Review each AI-generated answer, correct anything incomplete or inaccurate, and complete required fields.
3. When the visit is complete, tap Submit to EHR to send the documentation to the EHR.

#### COMPLETE CHECK OUT BEFORE MOVING ON

Check Out stops the EVV clock and triggers the next billing-related step, so it is important to complete before moving on. If the phone dies before Check Out, sign in on another device when available, open the visit, and complete Check Out as soon as you can.

## 7 · Working Offline

Rural routes, patient basements, and apartment dead zones can interrupt cell service. WellSky Point of Care keeps core visit functions available offline, displays an offline banner, and automatically syncs pending items when service returns. Each morning, open the app while connected so patient data is current and pre-visit summaries can be generated.

### What still works offline

| Available offline                                | Requires connection                     |
|--------------------------------------------------|-----------------------------------------|
| View today's schedule & patient records          | Real-time alerts & new physician orders |
| Document a visit end-to-end (all activity cards) | SkySense AI Med Extract processing      |
| Capture voice, photos, signature                 | Encounter Review AI analysis            |
| Check In and Check Out (EVV timestamps queue)    | WILA voice assistant                    |

1. The 'Offline Mode' banner appears whenever the app cannot reach the server. If you see it unexpectedly indoors, toggling airplane mode on and off may help reset the connection.
2. **Sync Status** shows how many changes are queued. When you are back in coverage, confirm the count returns to zero. If it appears stalled, force-closing and reopening the app may help restart sync.

#### BEST PRACTICE — STAY AWARE OF SYNC STATUS

When working offline, continue documenting as usual but watch the Sync Status count. Once service returns, confirm the queued changes sync back to zero before relying on the record as fully updated.

## 8 · Getting Help

Contact Home Health Support for technical issues. For workflow or training questions, start with your clinical supervisor.

### Home Health Support

| Contact | Detail                            |
|---------|-----------------------------------|
| Email   | homehealth.support@wellsky.com    |
| Phone   | 877-399-6538                      |
| Hours   | Mon–Fri · 7 a.m. – 7 p.m. Central |

### Where to Get Help

| Situation                                                | Where to go                                                                                     |
|----------------------------------------------------------|-------------------------------------------------------------------------------------------------|
| App lost data                                            | Call support — 877-399-6538                                                                     |
| Sync stuck for more than 2 hours                         | Call support — 877-399-6538                                                                     |
| 'How do I do X?' or 'I'm not sure which button to press' | Start with your clinical supervisor; if the question remains unresolved, contact email support. |
| 'I have an idea for a new feature'                       | Email support with subject line 'Feature request'                                               |

## Appendix A · Quick Field Reminders

*Consider keeping this one-pager nearby until the workflow feels familiar.*

| Helpful habits                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                  | Use extra care with                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                |
|-------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------|----------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------|
| <ul style="list-style-type: none"> <li>✓ Review the Pre-Visit Summary before you arrive</li> <li>✓ Check In once you are at the patient's door</li> <li>✓ Explain the recording and obtain verbal consent first</li> <li>✓ Include a ruler in wound photos when capturing measurements</li> <li>✓ Review each flagged medication item before submitting</li> <li>✓ Rename photos and documents while the context is fresh</li> <li>✓ Check tasks between visits when time allows</li> <li>✓ Complete documentation in the home when possible, even offline</li> <li>✓ Review the Encounter Review summary the same day when possible</li> </ul> | <ul style="list-style-type: none"> <li>! Avoid checking in before you reach the patient's door</li> <li>! Explain the recording before starting it</li> <li>! Confirm clinical details instead of relying only on the AI summary</li> <li>! Resolve medication questions or missing details before submitting</li> <li>! Complete Check Out as soon as possible, even if you need another device</li> <li>! Try not to leave all notes until the end of the day</li> <li>! Capture available insurance and consent documents during the visit whenever possible</li> <li>! Return to the Visit hub to stay in the right patient context</li> </ul> |