

# Wellthy Vendor Referral Guide

In this guide, you'll learn how Wellthy can offer relief to family caregivers by guiding them through our complex healthcare system and taking administrative tasks off of their plate. When you meet a team member who appears to be struggling to balance caregiving responsibilities with their work and personal life, follow this guide to refer them to Wellthy so we can provide them with care coordination support.

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## About Wellthy

Wellthy connects families with dedicated care professionals to help them tackle the logistical and administrative tasks of caring for the ones they love, including themselves. We understand how challenging caring for a loved one can be because at Wellthy we are caregivers ourselves. Our Co-Founder and CEO, Lindsay Jurist-Rosner, went through the difficult journey of caring for her mother with a chronic condition for 18 years, and founded Wellthy when she realized her experience is by no means unique. We are daughters, sons, mothers and fathers leveraging our professional and personal experiences to help families manage the complex healthcare system, and give them back time to focus on what's important.



### What is Wellthy?

Wellthy provides personalized support to help families tackle tasks related to complex, chronic, ongoing care and childcare needs. We use a thoughtful combination of technology and human support to guide employees through tricky caregiving situations and ensure nothing falls through the cracks.

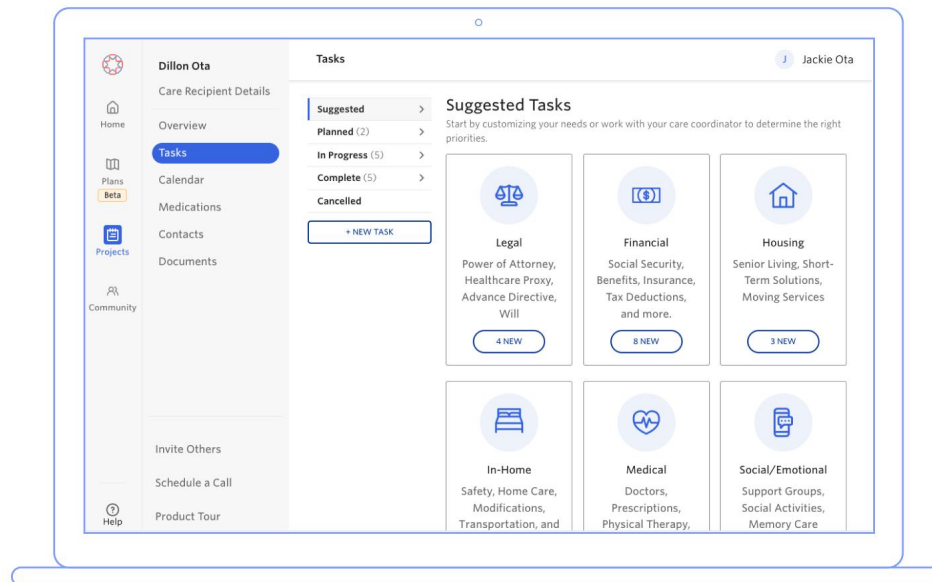
### How does Wellthy support families?

With Wellthy, employees get the help they need to manage the financial, medical guidance, legal, in-home, housing childcare, and emotional support needs of their loved ones. We're here to help team members find caregiving solutions for their loved ones who are aging, ill, diversely abled, as well as their children. And unlike other care companies, we aren't just resource providers or researchers, we are doers. We're here to help caregivers check things off of their to-do lists.

### Who is a Care Coordinator?

Wellthy's Care Coordinators are masters level social workers, nurses, psychologists and other professionals who get to understand their family's unique situation, guide them through a plan, and take on those tricky tasks all through a modern online experience. Care Coordinators can help manage everything from the small daily tasks like scheduling appointments or arranging transportation, to the bigger ones, such as vetting an in-home aide and evaluating insurance options like Medicare, Medicaid or veterans' benefits.

## Everything in one place — for whenever a family needs it



Wellthy's Care Dashboard provides employees and their families with a centralized and secure place to plan, organize, and manage care activities. The platform makes it simple to invite family and friends and keep everyone that's involved in a loved one's care informed.

**Tasks:** Access a personalized to-do list that considers it all, and create new tasks at any time

**Messaging:** Communicate directly with a dedicated care professional who gets stuff done on the family's behalf

**Calendar:** Coordinate schedules, add notes or reminders, and keep track of appointments

**Medication and Contacts:** Store and manage prescriptions and contacts with ease

**Documents:** Centralize important documents and information

**Community:** Join a peer-to-peer space for family caregivers to find support, share experiences, and gain knowledge across a range of care topics

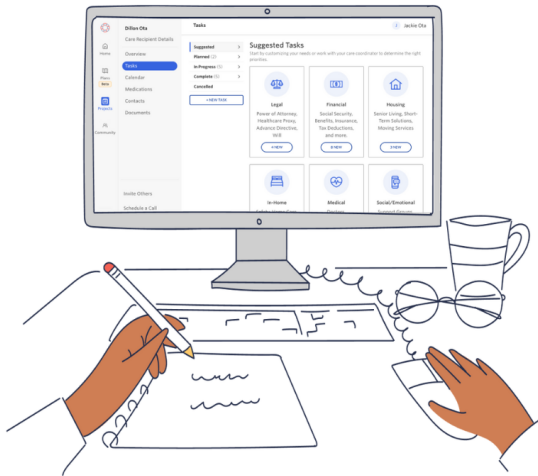
## How it works for WellSpan Health team members

Wellthy provides caregiving support for US-based team members and their loved ones as a covered benefit

Here at Wellthy, we don't define what a "loved one" means to team members. If caring for someone is impacting their day-to-day life, Wellthy will step in to take the load off of their plate.

There is also no limit to the number of Care Projects team members can open,

or how many hours Wellthy care experts will devote to supporting them. However, it is important to note that team members must be the ones to create the Care Project on the Wellthy platform. They can then invite as many family members as they'd like to join.



## How Wellthy can help families in each care domain

At Wellthy, we understand that every family's caregiving journey is unique.

We offer personalized caregiving support across various domains, and all stages of life, to help unburden families from whatever logistics they may be dealing with.

This way, caregiving employees and those they love can focus on what matters most to them.

### Aging



- Finding the right in-home aide or organizing a move into a facility
- Recommending local socialization programs
- Setting up in-home modifications, meal delivery, and transportation
- Helping a family find the right legal resources
- Navigating Medicare, Medicaid, Social Security and veterans' benefits

## Veteran Support

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- Helping veterans and caregivers gain access to benefits and providers
- Navigating benefits and coverage offered through the VA and privately
- Helping with a veteran's financial benefit application
- Finding the right emotional support programs
- Smoothing the transition from the military to private citizenship

## Special Needs

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- Managing and sourcing aides and therapists
- Navigating state and employer-sponsored benefits and coverage
- Assisting with school decisions and transitions of care
- Tracking down insurance approvals

## Financial Support

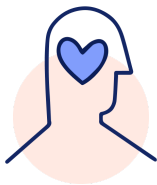
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- Advocating on appeals, bills, and financial aid applications
- Exploring community-based resources and programs
- Helping with a Medicaid or veteran's benefit application
- Finding alternative payment options, medication discounts & waiver programs

## Mental Health

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- Finding the right provider or in-patient/out-patient program
- Navigating in-network and out-of-network options
- Exploring alternative therapy options
- Ongoing check-ins and support

## Health Conditions

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- Finding providers, scheduling appointments, contesting insurance bills
- Navigating alternative treatment, clinical trials, and top research centers
- Handling the transfer of medical records and tracking down referrals
- Sourcing support groups and therapists



## Case study: Supporting Jennifer and her husband

Jennifer's husband, Ron, was recently diagnosed with type 2 diabetes in addition to a pre-existing health condition. The couple was enrolled in Jennifer's employer's health plan, and they were having trouble assessing treatment options considering Ron's new diagnosis. Due to the complexities of his dual diagnosis, the couple's insurance case manager suggested they open a Care Project with Wellthy, another benefit offered by Jennifer's employer that is separate from their insurance.

By visiting her employer's dedicated Wellthy landing page, Jennifer created an account and shared background about Ron's situation to start a Care Project. She then invited Ron onto the platform, and got instantly matched with a dedicated Wellthy Care Coordinator who began supporting Ron's care needs.

### Here's how Wellthy helped Jennifer and Ron:

- ✓ Turned their healthcare to-do list into a comprehensive plan within their online Care Dashboard
- ✓ Found in-network medical specialists and secured appointments to explore treatment options
- ✓ Uncovered an insurance reimbursement policy they didn't know was available to them
- ✓ Compiled a list of all of Ron's medical providers, contact information, and prescriptions so that everything was up-to-date, secure, and all in one place

## Trigger scenarios

Here are some examples of where Wellthy's support would benefit team members:



- ✓ Employees are caring for a loved one with complex or chronic care needs — regardless of relationship, dependent status, or household, so long as care needs are impacting a loved ones day to day
- ✓ Employees caring for a vulnerable child or child with a complex medical condition, where care coordination is needed to manage their complex care.
- ✓ Employees caring for a loved one with special needs and seeking care coordination support. For example: navigating state resources, school and transitions of care support, sourcing and vetting an in-home aide, etc.
- ✓ Employees seeking assistance with immediate or long-term planning for aging loved ones. For example: transition to a living facility, hiring in-home support, Medicaid, Medicare, and Social Security guidance, etc.
- ✓ Care scenarios where there are family employees involved, and would benefit from one point of contact and central hub to organize family's needs



**"Wellthy has taken the 'guesswork' out of finding the best possible care for our son which has allowed us more time to focus on what's most important in life."**

-Wellthy Member

## Trigger words

Here are some words to listen out for from team members that can trigger a referral to Wellthy:

<b>Aging</b>	Eldercare	In-home care	Power of Attorney
	Alzheimers / Dementia	Living facility	Will, living will
	Memory care		
<b>Veteran Support</b>	Veterans Affairs (VA)	Survivor benefits	VA burial / memorial
	Spousal support	Disability	Mental health
<b>Special Needs</b>	Autism	ABA therapy	Alternative therapies (music, equine, art, etc)
	Down syndrome	Disability	
	ADD/ADHD	IEP / 504 Plans	
<b>Financial Support</b>	Social Security	Disability	Financial assistance programs
	Medicare	Financial Resources	
	Medicaid	Waiver Programs	Community-based programs
<b>Mental Health</b>	Behavioral health	Substance abuse	In-patient facility
	Anxiety	Addiction	Out-patient facility
	Depression		
<b>Health Conditions</b>	New diagnosis	Medical providers	End-of-life
	Ongoing condition	Out-of-network	Prior authorization
	Surgery	Medical records	Hospital discharge



## Frequently asked questions

### **What are the costs associated with Wellthy's services?**

Wellthy's services are covered by WellSpan Health, which means their support is available to their employees at no cost. When Wellthy sets up services and professionals (i.e., transportation, an in-home aide) that are not covered by the employee's insurance, the family is responsible for covering the cost. But Wellthy will always provide transparent information and options when there are out-of-pocket fees involved.

### **Can team members use Wellthy to support more than one family member?**

Yes. To provide support to multiple family members, we suggest opening up a specific Care Project for each individual to ensure their unique needs are met. We will do our best to have the same Care Coordinator work with each separate Care Project.

### **Can Wellthy be used to help someone not living in the same state as the employee?**

Yes. The Care Project will be centralized on the virtual care dashboard and managed by a member of the coordination team, which operates completely remotely and is distributed nationwide. This means that no one associated with the Care Project needs to be living in the same home, or even the same state.

### **Does the employee need to be the primary caregiver to use Wellthy?**

No. Here at Wellthy, we do not define what "loved one" means. If caring for this person is impacting the employee's day-to-day in any way, Wellthy can help. We note that the person setting up the care project needs to be a WellSpan Health team member, but the employee will then be able to invite as many people to the care project as they'd like.

### **What health conditions will Wellthy help with?**

Wellthy is willing to help out with any health condition, physical or mental. While we are not doctors, we will help with the logistical and administrative tasks associated with caregiving duties such as finding the right resources, scheduling appointments, answering billing questions, and more.

## How to refer WellSpan Health team members to Wellthy

Connecting team members with a Wellthy Care Coordinator is simple! Follow the steps below to assist them in creating an account on the Wellthy platform, and from there they will be matched with a dedicated Care Coordinator who is an expert in the individual's area of need. They will map out, prioritize, and tackle tasks on team members' behalf so they can focus on spending quality time with the ones they love.

- 1 Refer team members to WellSpan Health's dedicated landing page: [join.wellthy.com/wellspan](https://join.wellthy.com/wellspan)
- 2 Direct them to click Get Started where they'll create an account using their WellSpan Health email address, and share background on their care situation
- 3 Using that information, Wellthy will match them with a dedicated care expert based on their unique needs. The Care Coordinator then maps out and prioritizes tasks so they can start getting the important things done on the team members' behalf



**Wellthy's customer support team is available to answer questions about the sign-up process.**

Reach us by calling (877) 588-3917 or chat with us live by visiting [join.wellthy.com/wellspan](https://join.wellthy.com/wellspan)