



# Presenter



Customer Success Manager

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# Today's Agenda

Why  
Where  
Who  
How  
What

## Reports can provide details that help you...

- Develop forecasts, marketing plans
- Guide budget planning
- Improve decision making
- Track progress
- Identify trends

WHY?

## You may need to provide reports to...

- Payor source
- Case Manager
- Client or family member
- Auditor/Surveyor
- Accountant
- Court



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# G.I.G.O.

“Garbage In, Garbage Out”

Remember that a computer just processes the data it is given. Bad (or missing) input will result in bad (or missing) output.

That phrase, by the way, is attributed to an early IBM programmer... George Fuechsel.

He knew what he was talking about!



## Areas in which you can generate reports:

- Client list
- Caregiver list
- Dashboard
- Many master lists
- Payroll export
- Billing export
- EVV Schedules/Calls/Audit Trail
- Audit Client Access
- Audit User Log
- Client Audit Trail
- Delete Schedules Audit Trail
- Caregiver Search

WHERE?

And, of course...

- Reports (“Canned Reports”)
- Report Writer

# Report Formats Available

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PDF

Excel

Word

RTF

Excel Data

Email

## PDF

“Portable Document Format” - Adobe Reader has a free version that anyone can use to open & read documents. Typically used to save files that don't need to be modified, but DO need to be easily shared. PDF is the default output for reports in Generations.

## Excel

Microsoft Excel format will contain most of the formatting from your report, and if data in a cell is too big to fit that cell, it merges it into more than one cell.

## Excel Data

This format does NOT merge cells... each object is added to only one cell. If your intention is to manipulate the data - calculations, summing columns, etc... this is what to use.

## Word

Creates the report in Word format - helpful if you wish to augment the report headers, or add additional information beyond the data in the report itself.

## RTF “Rich Text Format”

A universal format for text files - it can include some of the font styles, formatting, images, etc.

## Email

Some reports are designed to be easily emailed to caregivers or clients with the click of a button. ANY report you run in Generations can be emailed to anyone - all you need to know is their email address.

# Setting Up for Great Reports

- **Logo & Company Name**
- Security Considerations

The screenshot shows the 'Company Settings' page with the following fields and options:

- Company Name:** Your Agency Name (highlighted with red arrow 1)
- Tax ID:** 111554545
- Address:** 2625 Denison
- City:** Miami
- State:** FL
- Zip:** 33186
- Phone:** 9895464513
- Provider Number:** test145
- Company payroll ID:**
  - Agency ID: 231
  - Franchise ID: [empty]
  - Franchise ID: [empty]
- Logo:**
  - ☒ Default
  - ☐ No Logo
  - ☐ Custom
- ☒ Use company name on reports (highlighted with red arrow 3)

Your agency name can appear at the top of reports - IF you have it entered here!

Download your company logo to have it appear on reports, or on your caregiver badges.

There are some recommendations for size & shape of logos - check out the user documentation for more information.



# Setting Up for Great Reports

- Logo & Company Name
- **Security Considerations**

Limit access for each user based on job responsibilities.

Admin Company Settings Shift Requests 2 Messages 0 Alerts 0 Notifications 10 Active Users 1

Company Information Calendar Options Other Options QuickBooks Security EVV Online Forms Web Portal

**Global Settings**

Auto Logout users after minutes of inactivity 20 Incorrect Login attempts before the account is locked 3

Auto Logout mobile users after minutes of inactivity 20 Mask SSN for non-admin users ☒

Do not allow confirmed schedules to be edited or deleted ☒ Restrict dashboard access to Admin users ☒

Do not allow notes and closed call center records to be edited or deleted ☒ Require note when manually confirming schedules ☒

Do not allow signed schedule times to be edited or deleted ☒ Require Strong Password ☒

Enable Message Center for secure caregiver communication ☒ Password Minimum Length 6

Force password change ☐ Every 30 Days Enforce Password History ☒

Require administrator for overriding alerts ☒ Enable account lockout duration ☒

Account lockout duration (Minutes) 10

Location	Class	Groups			
Group	Description		Read	Update	Delete
Administrator	Access to Company Settings : Timesheet Weeks : Security : Holiday		<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>
Call Center	Access to Call Center		<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>
Caregiver Data	Caregiver Data Form - all tabs except payroll items : Class list : Class		<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>
Caregiver Pay Rates	Payroll Items Tab : Pay Rate on Scheduling Forms : Pay Rate on Timesheets		<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>
Client Data	Client Intake Form (except Service Orders) : Agency List : Case Manager List : Client Type List : Payors List : Physicians List : Referral Sources List		<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>
Client Service Orders and Services	Access to service order tab on client intake form : Service code list : Service order tab on edit timesheets form		<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>
Integrated Apps	QuickBooks Functions		<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>
Report - CaseManager	Access to the Case Manager Reports Category		<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>
Reports - Billing	Access to all Billing Reports		<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>
Reports - Caregivers	Access to the Caregiver Reports Category		<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>
Reports - Clients	Access to the Client Reports Category		<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>
Reports - EVV	Access to all EVV Reports Category		<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>
Reports - Mailing Labels	Access to all Mailing Label Reports		<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>
Reports - Schedules	Access to Scheduling Reports		<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>
Reports - Timesheet/Payroll	Access to all Timesheet and Payroll Reports		<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>
Scheduling	Scheduling Functions : Caregiver Search : EVV Messaging		<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>
Timesheets	Create Timesheets : Reset Timesheets : Edit Timesheets		<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>

Check to assign permission and uncheck to remove permission



# Running Reports

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Now that we've covered the why, where, how & who... let's look at the ...

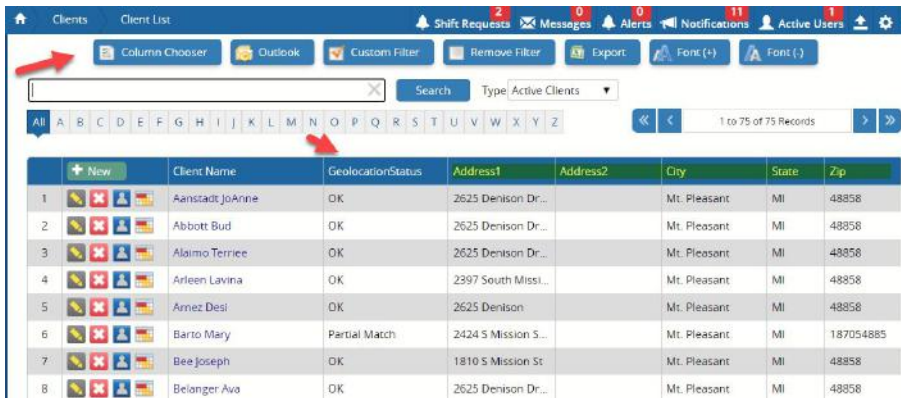
WHAT?

- From Lists
- Dashboard
- Payroll Export/Billing Export
- EVV
- Audit Trails
- Caregiver Search
- “Canned” reports
- Report Writer

# Quick & Easy - from Lists

## Example

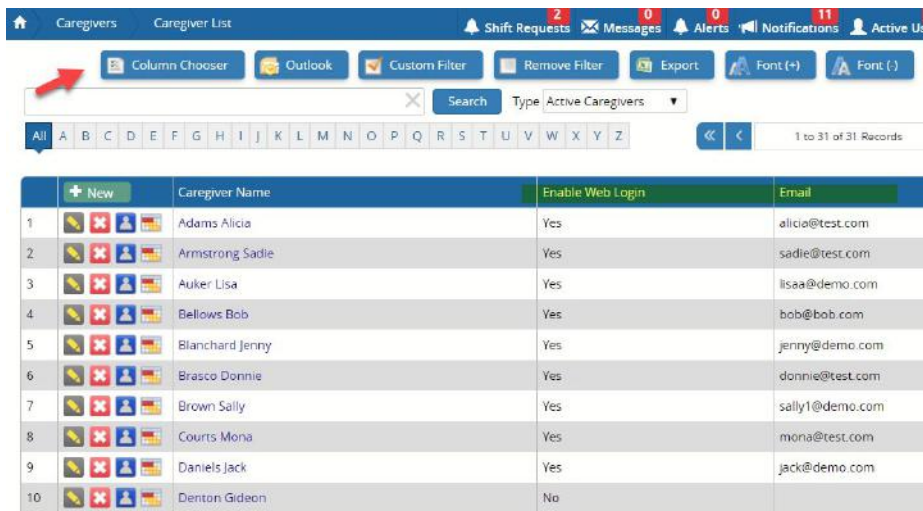
Perhaps you want to ensure that all clients have a good geolocation for EVV (and caregiver search) purposes:



	+ New	Client Name	GeolocationStatus	Address1	Address2	City	State	Zip
1		Aanstadt JoAnne	OK	2625 Denison Dr...		Mt. Pleasant	MI	48858
2		Abbott Bud	OK	2625 Denison Dr...		Mt. Pleasant	MI	48858
3		Alaimo Terrieje	OK	2625 Denison Dr...		Mt. Pleasant	MI	48858
4		Arleen Lavina	OK	2397 South Missi...		Mt. Pleasant	MI	48858
5		Arnez Desi	OK	2625 Denison		Mt. Pleasant	MI	48858
6		Barto Mary	Partial Match	2424 S Mission S...		Mt. Pleasant	MI	187054885
7		Bee Joseph	OK	1810 S Mission St		Mt. Pleasant	MI	48858
8		Belanger Ava	OK	2625 Denison Dr...		Mt. Pleasant	MI	48858

## Example


Or maybe you're about to launch your caregivers on the mobile app - and you need to make sure they are all web-enabled...



	+ New	Caregiver Name	Enable Web Login	Email
1		Adams Alicia	Yes	alicia@test.com
2		Armstrong Sadie	Yes	sadie@test.com
3		Auker Lisa	Yes	lisaa@demo.com
4		Bellows Bob	Yes	bob@bob.com
5		Blanchard Jenny	Yes	jenny@demo.com
6		Brasco Donnie	Yes	donnie@test.com
7		Brown Sally	Yes	sally1@demo.com
8		Courts Mona	Yes	mona@test.com
9		Daniels Jack	Yes	jack@demo.com
10		Denton Gideon	No	



## Export out to Excel (XLS)



	A	B	C
1	Caregiver Name	Enable Web Login	Email
2			
3	Adams Alicia	Yes	alicia@test.com
4	Armstrong Sadie	Yes	sadie@test.com
5	Auker Lisa	Yes	lisaa@demo.com
6	Bellows Bob	Yes	bob@bob.com
7	Blanchard Jenny	Yes	jenny@demo.com
8	Brasco Donnie	Yes	donnie@test.com
9	Brown Sally	Yes	sally1@demo.com
10	Courts Mona	Yes	mona@test.com
11	Daniels Jack	Yes	jack@demo.com
12	Denton Gideon	No	
13	Dillings Samantha (Sam)	No	samantha@demo.com
14	Goodwinton Margueriteann	Yes	ma@test.com
15		Yes	7890@vte

All names are purely fictional

## Quick & Easy from Lists

*Ability to export to XLS is available in these areas:*

**Client List**

**Caregiver List**

**Payors**

**Physicians**

**Referral Sources**

Payroll Items

**Service Codes**

**EVV Schedules**

**EVV Calls**

EVV Audit Trail

Audit Client Access

Audit User Log

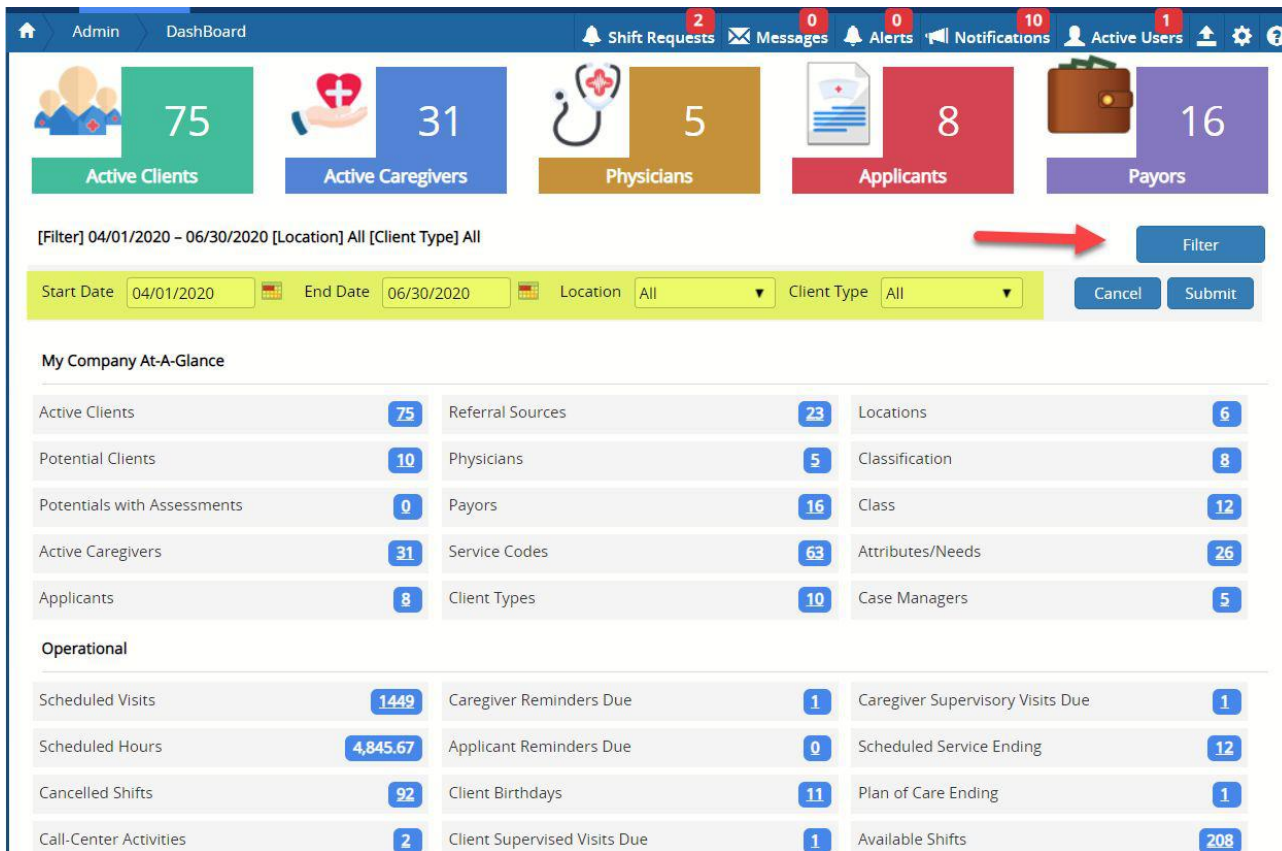
Client Audit Trail

Delete Schedule Audit Trail

**Caregiver Search**

**BOLD** indicates Column  
Chooser Capability

# Dashboard



- Remember that you can limit view of the dashboard to “Admin only” via Security.
- By default, Dashboard displays metrics for current month.
- Filter Dashboard to date range, location, client type as needed.
- Any metric that is underlined will either take you to that area of the system, OR run a report to display that metric.

(Example: Clicking on the “1449” listed under Scheduled Visits results in the generation of a “Schedules by Date” report for the filtered criteria.)

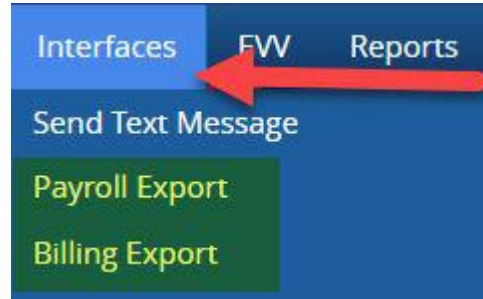
# Payroll & Billing Exports

## Payroll Export Config

There are default, 'canned' exports that are designed to meet the requirements of certain 3rd-party payroll vendors, such as Paychex or ADP. If you work with a different 3rd party, or need to create an export of payroll data that is different than the canned defaults, you can create your own format by going to Payroll Export Config.

This opens up a column chooser so you can lay out your own, custom export.

The screenshot shows the 'Payroll Export Config' dialog box. At the top, there is a checkbox labeled 'Include separate columns for OT and Hol rate/hours'. Below this, there are two main sections: 'Selected Columns' and 'Column Order'. The 'Selected Columns' section contains a list of fields with checkboxes: AgencyID, AgencyName, AlternateDescription, AmountToPay (checked), Class, Client City (checked), Client ID, Cost, Description, End Time (checked), EndDate, and First Name (checked). At the bottom of this list are 'Select All' and 'Remove All' options. The 'Column Order' section shows a list of the selected fields in their current order: Start Date, Start Time, End Time, Last Name, First Name, SSN, Client City, Pay Type, and AmountToPay. To the right of this list are up and down arrow buttons. At the bottom of the dialog are 'Reset To Default', 'OK', and 'Cancel' buttons.



## Billing Export Config

Likewise - if the generic billing export, or one of the many state-specific formats, doesn't meet the need, create your own custom billing export.

The screenshot shows the 'Billing Export Config' dialog box. At the top, there are two checkboxes: 'Exclude Payroll Items (Recommended)' and 'Exclude GPS Location (Recommended)'. Below these are two main sections: 'Selected Columns' and 'Column Order'. The 'Selected Columns' section contains a list of fields with checkboxes: AccountingID, Alternate Description, Authorization Number (checked), Billed, CaregiverFirstName (checked), CaregiverLastName (checked), CaregiverSSN, Casemanager (checked), Client Address 1, Client Address 2, Client City, and Client ID. At the bottom of this list are 'Select All' and 'Remove All' options. The 'Column Order' section shows a list of the selected fields in their current order: Casemanager, ClientType, ClientLastName, ClientFirstName, CaregiverLastName, CaregiverFirstName, Service Code, Service Type, Authorization Number, Date, StartTime, EndTime, Hours, and CaregiverID. To the right of this list are up and down arrow buttons. At the bottom of the dialog are 'Reset To Default', 'OK', and 'Cancel' buttons.

Note: Billing & Payroll exports are based on Timesheets (not schedules).

# Audit Trails

You can export to XLS from:

- Audit Client Access
- Audit User Log
- Client Audit Trail
- Delete Schedule Audit

Admin **Audit User Log** Shift Requests 0 Messages 0 Alerts 0 Notifications 10 Active Users 1

Refresh Export

Select Date 06/26/2020-06/26/2020 User Name All Users 1 to 16 of 16 Records

User	RemoteHostAddress	SessionStart	SessionEnd	LoggedOut	IsQISync	Forced Logout	User	IsMobile	Concurrent Login	Logged Out Source
sadie@rest.com	174.230.31.11	06/26/2020 04:49:42 PM	06/26/2020 04:52:13 PM							Mobile App/Site
Lynne	35.32.68.10	06/26/2020 04:48:34 PM	06/26/2020 04:57:41 PM							Web Browser
Lynne	35.32.68.10	06/26/2020 04:34:09 PM	06/26/2020 04:35:07 PM							Web Browser
Lynne	35.32.68.10	06/26/2020 04:30:38 PM	06/26/2020 04:32:33 PM							Web Browser
Lynne	35.32.68.10	06/26/2020 04:30:21 PM	06/26/2020 04:30:32 PM							Web Browser
Lynne	35.32.68.10	06/26/2020 04:29:32 PM	06/26/2020 04:29:49 PM							Web Browser
sadie@rest.com	174.230.31.11	06/26/2020 04:25:30 PM	06/26/2020 04:26:14 PM							Mobile App/Site
...	...	06/26/2020 04:20:20	06/26/2020 04:24:55							Mobile App/Site

Audit User Log

Admin **Client Audit Trail** Shift Requests 0 Messages 0 Alerts 0 Notifications 10 Active Users 1

Refresh Export Close

Table User Name Select Date Assigned To  
All All 04/06/2020-04/10/2020 (All Clients) Deleted Changed

1 to 100 of 109 Records

Table	Display Name	Field	Changed	Deleted	Old Value	New Value	Updated Time	User
Client Personal Data	Davenport, Osgood	AlertNote	<input checked="" type="checkbox"/>	<input type="checkbox"/>		High risk for falls	04/10/2020 04:53 PM	Lynne
Client Personal Data	Davenport, Osgood	ScheduleAccessAlert	<input checked="" type="checkbox"/>	<input type="checkbox"/>	0	1	04/10/2020 04:53 PM	Lynne
Client Personal Data	Davenport, Osgood	Enable Login	<input checked="" type="checkbox"/>	<input type="checkbox"/>	No	Yes	04/10/2020 04:53 PM	Lynne
Client Personal Data	Davenport, Osgood	Address1	<input checked="" type="checkbox"/>	<input type="checkbox"/>		1700 W High Street	04/10/2020 04:53 PM	Lynne
Client Personal Data	Davenport, Osgood	Ambulatory	<input checked="" type="checkbox"/>	<input type="checkbox"/>		Yes with Assistance	04/10/2020 04:53 PM	Lynne
Client Personal Data	Davenport, Osgood	AssessmentDate	<input checked="" type="checkbox"/>	<input type="checkbox"/>		04/03/2020	04/10/2020 04:53 PM	Lynne

Client Audit Trail



# Caregiver Search

Caregiver Search is the fastest way to find available, qualified caregivers to fill your open shifts.

In this example, I've filtered to *several* things.

Don't forget to use the Column Chooser when selecting which fields to display & export.

**Caregiver Search** | Client Visit History

Search Export Print Save Search Load Search Send Text Message Close

**Client Filters**

Client: Denton Max Date From: 07/16/2020 Date Thru: 07/16/2020  
Service Order: .....Select..... Start Time: 07:30 AM End Time: 10:00 AM  
Service: Personal Care  
Days/Week: ☐ Su ☐ Mo ☐ Tu ☐ We ☒ Th ☐ Fr ☐ Sa **Select all days**

**Needs Filter**

☐ Select all Required  
☒ Select All Assigned  
☐ Select None

**Needs** Required  
Any Attributes ☐  
Alzheimers - Dementia ☐  
Assist with Bathing ☒  
Care Management ☐  
Companionship and ☒

**Caregiver Filters**

Classification: CNA Class: All Class Text Msg Group: (All)  
City: (All Cities) County: (All Counties) Zip: (All)  
Gender: (All) Available %: 100%  
☐ Include Applicants ☒ Show Scheduled Hours  
☒ Show OT Alert ☒ Require 20 minutes between shifts

**Column Chooser** Proximity (Miles): 20 Map Results Preferred Caregiver Caregiver with Prior visit

(Proximity is estimated based on point-to-point calculations and will be less than the mapped distance)

1 to 3 of 3 Records

	Schedule	Notes	Map	Caregiver	Avail %	Distance	Text Msg #	County	Class
Q	Add	Add	Map	Dillings, Samantha (Sam)	100.00 %	1.48		Isabella	MTP
Q	Add	Add	Map	Courts, Mona	100.00 %	2.28	9873213518@messagin g...	Isabella	GRA
Q	Add	Add	Map	Jackson, Loretta	100.00 %	18.36		Isabella	GRA

Perhaps you don't really need to print the search results - choose to save & name your search results so you can come back and load it up again later!



## “Canned Reports”

The screenshot shows the 'Reports' section of a software interface. At the top, there's a navigation bar with icons for Shift Requests (0), Messages (0), Alerts (0), Notifications (10), and Active Users (1). Below this is a 'Categories' section (callout 1) with radio buttons for All (selected), Billing, Caregivers, Case Manager, Clients, Mailing Labels/Badges, Schedules, EVV, and Timesheet/Payroll. To the right is a 'Select Format' section (callout 2) with icons for PDF, Excel, Excel Data, Word, RTF, and Email. At the bottom left are 'All Reports' and '★ Favorites' buttons (callout 3). At the bottom right is a search bar labeled 'Search Reports...' (callout 4).

### The Basics:

1. Choose the category of report you wish to run...
2. Select the Format you wish to generate it in.... (PDF is the default)
3. If it's a report you'll run often, mark it as a favorite - that way it'll be easier to find by filtering the list of ALL reports to just your favorites!
4. Looking for something specific? Try some keyword searches... (this will look for your search string in both the Name and Description columns).

## “Canned Reports”

Every report will have abilities to filter, sort and/or group. Some will have just a few parameters - and some will have considerably more.

### Client Roster

From

Thru

Status

Location

### Caregiver Working Report

Caregiver List

- Adams,Alicia
- Andrews,Sharon
- Armstrong,Sadie
- Auker,Lisa
- Beard,Rose
- Bellows,Bob
- Benson,Jackie
- Benson,Maria
- Blanchard,Jenny
- Brasco,Donnie
- Brown,Sally
- Cancelled,Caregiver
- Cancelled,Client
- Courts,Mona
- Daniels,Jack
- Denton,Gideon
- Dillings,Samantha (Sam)
- Goodwinton,Margueriteann
- Hall,Harold

☐ Select All

Report Based On

☒ Schedule ☐ Timesheet

Start Date

End Date

Class

Classification

Status

Confirmed Status

☐ Max number of visits

### Billing Report Parameters

Client Type

Client

From

Thru

Location Id

Payer

Status

☐ Include Travel Time Client

Received Status

☒ All Timesheets

☐ Received Timesheets

Billed Status

☒ Billed ☒ Un-billed

☒ Include Other Expenses

Group By

☒ Clients ☐ Service ☐ Date ☐ Payer ☐ Location

☐ Page Break after each group(Detail Reports)

☐ Show as 1 Hour =  Units

☐ Select specific services

☐ Include Accounting ID

Group by Client Additional Parameters

☐ Detail with sub-totals by service

☐ Summary with sub-totals by service

☐ Sub-totals by date per service

☐ sub-totals by authorization number

Group by Location Additional Parameters

☐ Summary total hours and billable amount

Billing Form ☐ CMS1500 ☐ UB04

# "Canned" Report Highlights

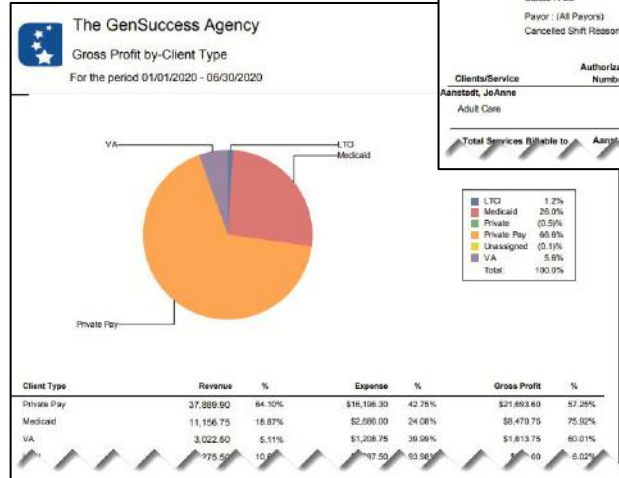
Some reports/exports are likely already part of your **\*\*Best Practice...**

**Billing/Claims:** Billing Report by Client  
Gross Profit  
Projected Billing

**\*\*based on Timesheets**, shows total revenue  
analyze revenue & payroll in several ways  
projected revenue based on schedules

**FAST FACT**  
Billing & Timesheet reports  
are pulled from Timesheets,  
with the exception of:  
1. Gross Profit - Estimate  
(schedules)  
2. Projected Billing Report  
(schedules)

Date Range : 02/24/2020 - 03/30/2020 Payor : (All Payors) Client Type : All Client Types Location : All Locations Status : All Services : All										
Clients/Carveover	Services	Authorization Number	Date	Start	End	Hours	Cost/Unit	Received Timesheet	Billed	Total Billable
Butler, Willie	Attendant Care - Hourly	VM792111-8	06/25/2020	09:00 AM	01:00 PM	4.00	\$35.750	<input type="checkbox"/>	<input type="checkbox"/>	\$143.00
Metc, Ethel	Attendant Care - Hourly	VM792111-8	06/25/2020	09:00 AM	01:00 PM	4.00	\$35.750	<input type="checkbox"/>	<input type="checkbox"/>	\$143.00
Metc, Ethel	Attendant Care - Hourly	VM792111-8	06/27/2020	09:00 AM	01:00 PM	4.00	\$35.750	<input type="checkbox"/>	<input type="checkbox"/>	\$143.00
Metc, Ethel	Attendant Care - Hourly	VM792111-8	06/28/2020	09:00 AM	01:00 PM	4.00	\$35.750	<input type="checkbox"/>	<input type="checkbox"/>	\$143.00
Metc, Ethel	Attendant Care - Hourly	VM792111-8	06/29/2020	09:00 AM	01:00 PM	4.00	\$35.750	<input type="checkbox"/>	<input type="checkbox"/>	\$143.00
<b>Other Expenses</b>										
Service	Date	Total Units	Cost Per Unit	Total Cost						
Bilable Mileage	06/25/2020	15.00	2.500	\$39.00						
Bilable Mileage	06/27/2020	5.00	2.500	\$14.00						
Bilable Mileage Total :				\$53.00						
Total Other Expenses				\$53.00						
<b>Total Services Billable to Butler, Willie</b>						<b>20.00</b>	<b>\$39.325</b>	<b>\$786.00</b>		
<b>Total other expenses</b>								<b>\$53.00</b>		
<b>Grand Total</b>								<b>\$839.00</b>		



Date Range : 01/01/2020 - 07/06/2020 Client Type : (All Client Types) Location : All locations Status : ALL Payor : (All Payors) Canceled Shift Reason : All				
Clients/Service	Authorization Number	Hours	Cost/Unit	Total Billable
Aanstadt, JoAnne				
Adult Care		34.00	27.50	935.00
<b>Total Services Billable to Aanstadt, JoAnne</b>		<b>34.00</b>	<b>27.50</b>	<b>935.00</b>



# "Canned" Report Highlights

## HR: (caregivers)

Caregiver Badges  
In-Services  
Reminders  
Caregiver Working  
Caregiver Referrals  
Paycheck Protection FTE

customize it to fit your needs  
track caregiver training  
track caregiver credentials  
track cg's # of shifts (can be based on timesheets OR schedules)  
track referrals, along with hire % and ave. length of service  
NEWEST REPORT: Weekly calculation of FTE's



The GenSuccess Agency  
Caregiver Working Report (Timesheet)

Date Range : 1/1/2020 - 7/8/2020  
Class : All  
Classification : HHA  
Status : Active

Caregiver	Class	Classification	Hire Date	First Visit	Last Visit	Total Visits	Total Hours
Armstrong, Sadie	LMI	HHA	10/18/2016	03/05/2020	05/14/2020	5	15.00
King, Donna	MTP	HHA	02/09/2018	04/26/2020	05/28/2020	34	68.00
Klement, Penny	MTP	HHA	05/05/2011			0	0.00
Natoli, Kimberly	GRA	HHA	07/16/2016	03/18/2020	06/28/2020	34	142.50

The GenSuccess Agency  
Caregiver Referral Report Group By Referral Source

Date Range : 1/1/2015 - 12/31/2015  
Class : All Class  
Classification : All Classifications  
Referral source : All Referrals

Referral	Caregiver	Status	Application Date	Hire Date	Term Date	Reason	Length of Serv
Facebook	Adams, Alicia	A	12/03/2015	12/07/2015			1,675
	Mertz, Ethel	A	07/01/2015	07/06/2015			1,629
Applicants : 0   Caregivers : 2   Hires : 2   Avg Length of service : 1,752.00   Hire % : 100.00							

The GenSuccess Agency  
Caregiver Reminder  
Expired as of 09/30/2020

Caregiver	Due Date	Completed	Completed Date	Item	Notes
Sunshine, Sally	06/01/2020	<input type="checkbox"/>		CPR Certification Expires	
Brasco, Donnie	07/06/2020	<input type="checkbox"/>		CPR Certification Expires	

The GenSuccess Agency  
Caregiver Absences  
01/01/2020-07/08/2020


Caregiver	Start Date	End Date	Start Time	End Time	Comments	Unschedule	Class
Brasco, Donnie	05/04/2020	05/04/2020	12:00 AM	11:59 PM	Donnie called in, said her aunt passed away over the weekend - will be with family out of state until Thursday.	<input checked="" type="checkbox"/>	LMI
Brasco, Donnie	06/19/2020	06/19/2020	12:00 AM	11:59 PM	Donnie didn't show up at her shift with Mrs. Williams this morning - when called, she said she was sick and couldn't work today, but would be able to work tomorrow.	<input checked="" type="checkbox"/>	LMI
Brasco, Donnie	07/03/2020	07/04/2020	12:00 AM	11:59 PM	Approved Donnie for Friday & Saturday off	<input type="checkbox"/>	LMI

# "Canned" Report Highlights

## Client Care:

Client Notes  
Plan of Care/CMS485  
Supervisory Visits Due  
Plan of Care Ending  
Service Order Ending  
Hospitalizations/ER Visits

Documentation by date  
Care Plan  
Who has a Supervisory Visit Coming Up?  
Who has a Care Plan expiring soon?  
Who has an authorization expiring soon?  
Details, summary, and re-admission percentages



The GenSuccess Agency  
2625 Denison Miami FL 33186  
(989)548-4513

Care Plan For JoAnne Aanstadt

Aanstadt, JoAnne

**Client Information**

Name: JoAnne Aanstadt DOB: 03/17/1935 Start Of Care: 11/25/2013 DNR ☐

Phone: 987-679-2335 Phone2: Location: MT1

Diagnosis: Unspecified jaundice ENV ID: 22

Address: 2625 Denison Drive, Mt. Pleasant, MI 48858

Assessed By: Lynne Date: 06/20/2019

Revised By: Date:

**Physician(s)**

Name: Dr. Tom Whalen Speciality: Pulmonologist Phone: 989-547-8744

Address: 2309 Adams Avenue, Alma, MI 49344 Alt Phone: 641-845-6215

---

Name: Carolyn Carr, MD Speciality: Geriatrics Phone: 646-646-6466

Address: 28 W. Adams, Suite 102, Detroit, MI, 48258 Alt Phone: 123-987-4568

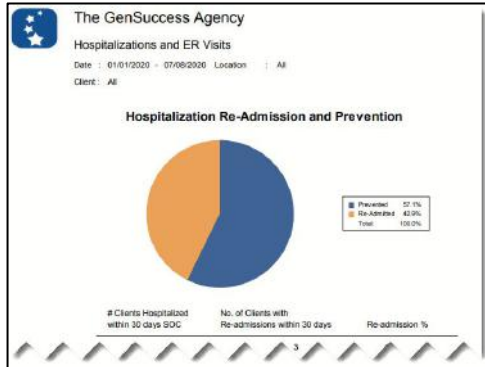
---


Name: Dr. Eric Taylor Speciality: Internal Medicine Phone: 879-679-2365

Address: 1001 South Street, Suite 101, Mt. Pleasant, MI, 48858 Alt Phone:

**Medications**

Drug	Dose	Frequency	Route	Order Type	Start Date	DC Date



 <div> The GenSuccess Agency Client statistics 01/01/2020-07/08/2020 </div>			
<b>Clients Service Statistics</b>			
Total Clients Served:	35.00	Location:	ALL
Total Client Hours:	9,364.42		
Total Males Served:	15		
Total Females Served:	8		
Average Patient Age:	84		
<b>Clients serviced by Priority</b>			
Priority	Serviced Clients	Active Clients	Scheduled Hours
		12	2,313.75
		2	0.00

 <div> The GenSuccess Agency Service Orders Ending Summary 07/08/2020 - 12/31/2020 </div>					
Client: All Clients		Client Type: (All Client Type)		Location: All Locations	
Service Order Status: (All)		County: (All Counties)		Case Manager: (All Case Manager)	
Client	Payor	Service	Start Date	End Date	Authorization #
Aanstadt JoAnne	Aetna	Adult Care	07/07/2020	07/31/2020	AE894-7
May 20	Michigan Medicaid	Adult Care	06/20/2020	07/31/2020	AE8211



# "Canned" Report Highlights

## Scheduling:

Available Shifts  
Calendar Report  
Mini-Schedule  
Charting Report  
Completed Schedules & Tasks  
Scheduled Service Ending  
Screening Report  
Wellness Report

See which shifts you need to fill  
Print or send schedules on a calendar to clients/caregivers  
Just a different view of schedules  
See the detailed notes entered by your caregivers/nurses  
Shows EVV data, tasks completed, etc.  
Displays last scheduled service  
Screening Results  
Show Wellness questions assigned to schedules

**The GenSuccess Agency**  
Completed Tasks By Date  
06/01/2020-07/08/2020  
Status : A  
Client : All Clients  
Caregiver : All Caregivers  
Case Manager : All Case Managers  
Location : All Locations  
Client Type : All Client Type  
Payer : All Payers

**Aanstadt, JoAnne**  
(22)

Date	Scheduled Times	Caregiver	Service	EVV Login	EVV Logout
06/22/2020	09:30 AM - 06:45 AM	Aaker, Lisa(1715)	Adult Care	09/22/2020 09:25 AM	09/22/2020 06:33 AM

Other Expenses

Description	totalUnits
Billable Mileage	50.00
<b>Total Units</b>	<b>50.00</b>

**Signed Time and Tasks:**  
06/22/2020 09:30 AM - 10:00 AM

Task	Required	Completed	Updated By	Last Updated
Encourage fluids	<input type="checkbox"/>	<input checked="" type="checkbox"/>	Aaker, Lisa	06/22/2020 09:30 AM
Prepare & serve lunch	<input checked="" type="checkbox"/>	<input checked="" type="checkbox"/>	Aaker, Lisa	06/22/2020 09:30 AM

**Visit Notes**  
Here's my note.

Caregiver Signature: *[Signature]* Client Signature: *[Signature]*  
Signature Date: 06/22/2020 Signature Date: 06/22/2020

**Total Hours** **Others** 15 mins

**The GenSuccess Agency**  
Wellness Questions By Date  
05/15/2020-05/15/2020  
Case Manager : All

Question	Question Type	Alert Range	Entered Value	Alert
<b>Client :</b> Aanstadt, JoAnne <b>05/15/2020</b> 12:30 PM - 01:30 PM (Armstrong, Sadie)				
<b>Caregiver Lunch and Breaks</b>				
If you took a lunch break, for how many minutes?	Numeric		126	N
<b>Nursing and Medical</b>				
Did you remind client to take their medications?	Yes/ No	No	yes	

**The GenSuccess Agency**  
Caregiver Mini-Schedule  
07/08/2020 - 07/11/2020

**Adams, Alicia** 770-430-0595 989-406-1365  
709 W. State Street P.O. Box 3081 St. Johns MI 48879

07/08/2020	We	Smith, Jeff	01:45 PM	03:00 PM
07/08/2020	We	Smith, Judy	01:45 PM	03:00 PM
07/09/2020	Th	Leigh, Vivian	07:00 AM	10:30 AM
07/10/2020	Fr	Smith, Jeff	01:45 PM	03:00 PM

**The GenSuccess Agency**  
Last Schedule Service Report  
Service ending after 07/08/2020  
Case Manager : All CaseManagers  
Client Type : All Client Type  
Location : All

Client	Service	Last Scheduled Service
Aanstadt, JoAnne	Adult Care	01/29/2021 10:00:00
Abbott, Bud	Attendance	12/26/2021 14:00:00
Arken, Lavina	Live-In Hourly	11/11/2020 00:00:00
Barto, Mary	Adult Care	12/01/2020 23:00:00
Brady, Wayne	Adult Care	09/16/2020 10:00:00
Chase, John	Attendance - Hourly	12/01/2021 14:00:00




# "Canned" Report Highlights

## Marketing:

Inquiries & Assessments  
Referrals by Date  
Referral Source Notes

Track your referrals & intakes  
See which of your Referral Sources is sending you clients  
See activities on your Referrers (run this from the Call Center)

The GenSuccess Agency										
Call Center Report for										
Closed and Open calls.			Entered on: 06/01/2020 - 07/09/2020		Caller Type: Referral Source		Opened By: All		Assigned To: All	
Closed	Entered Time	Resolved Time	Caller	Phone Number	Note Type	Created By	Updated By	Xfer To Note	Assigned To	Due
<input checked="" type="checkbox"/>	06/04/2020 02:34:00 PM	06/04/2020 02:34:00 PM	Anna Lewis	123-456-7890	Phone Call Made	Lynne		<input checked="" type="checkbox"/>	(ALL)	
Called & spoke with Anna about the health fair scheduled for September.										
<input type="checkbox"/>	07/09/2020 12:46:00 PM		Judy Klements	977-987-9777	Email Received	Lynne		<input checked="" type="checkbox"/>	(ALL)	
Judy sent me an email, asking if we had any updated brochures & biz cards we could give her. She's putting together a packet for her clients, and wants to include our info. I called Judy, and advised I would drop by tomorrow morning at 9:00a to drop them off. (Also want to get a look at what else is going to be in that packet - I) Taking										



The GenSuccess Agency

Client Inquiries And Assessments Report All clients

Date Range : — 06/01/2020-07/09/2020

Case Manager : All Casemanagers

Location : All Locations

Client Type : All Types

Sales Rep : All SalesRep

Client	SalesRep	Case Manager	Inquiry Date	Assessment Date	Service Start Date	Reason	Status	Phone	ReferredBy
Norman Reagan	Jones, Sam	Lane, Rochelle	06/15/2020	06/16/2020	06/17/2020		A	989-555-5555	Spring Health Fair
Charmayne Smith	Phillips, Tammy	Johnson, Donna	07/08/2020			Pending Assessment	P	888-777-0000	Judy Klements

Report Summary

Inquiries

—

2

Inquiries with assessments

—

1

Inquiry conversion ratio

—

50 %

Assessment / Inquiry ratio

—

50 %

Assessment conversion ratio

—

100 %

The GenSuccess Agency										
Referrals by Date Range - Grouped by Referral Source										
Referral Source	Referral Type	Sales Rep	Service Start	Inquiry Date	Assessment Date	Referral #	Company	Phone	Client	Status
Diane Beemer	Referral Agency	Phillips, Tammy	04/01/2019	03/25/2019	03/27/2019	8655	M.O.W. Sr Outreach Svcs	989-745-854 7	Cue, Suzy	I
	Referral Agency	Jones, Sam	12/05/2019	11/28/2019	12/01/2019	30018	M.O.W. Sr Outreach Svcs	989-745-854 7	Murphy, Hazel	A
	Referral Agency	Phillips, Tammy	05/01/2020	04/28/2020	04/30/2020	984651	M.O.W. Sr Outreach Svcs	989-745-854 7	Lane, Rosa	A SA

## “Canned” Report Highlights

### Mailing Labels

- Caregivers
- Case Managers
- Clients
- Payors
- Physicians
- Referral Sources

### Formats Available

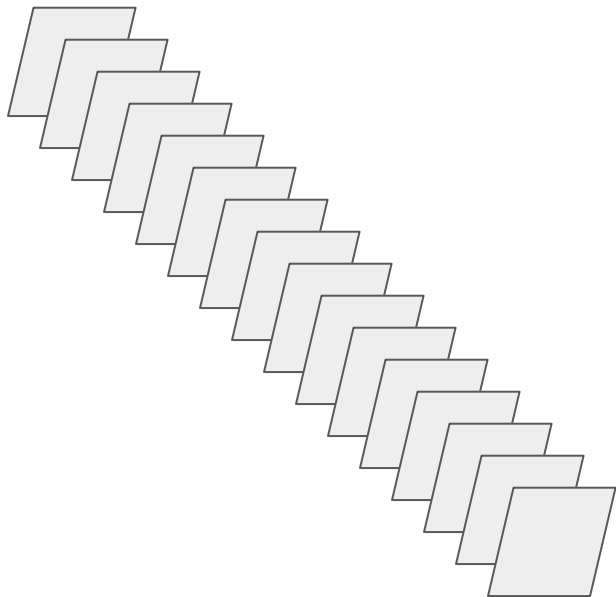
- 5163
- 5260
- 5261
- 5262

(any label compatible with the  
above Avery label sizes)

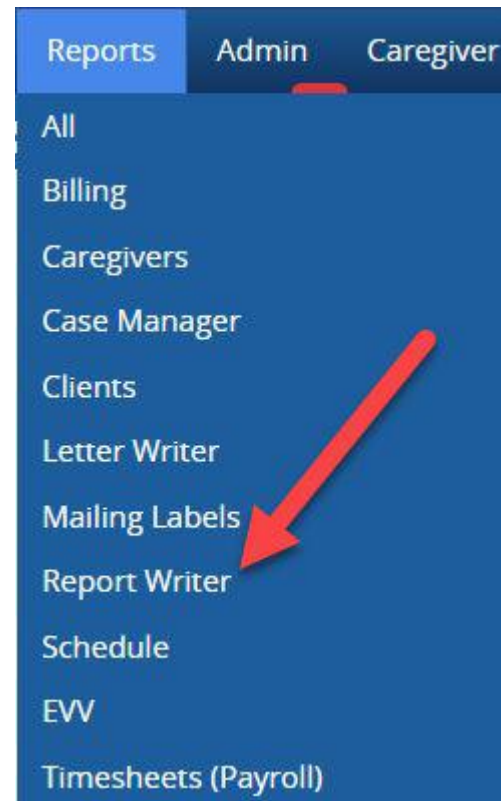
Can't find the report you need? Try building  
your own report in ....

**REPORT WRITER**

## Report Writer



All of the data in Generations is in tables. You can create your own, custom reports by selecting which table to query, determine which fields from that table to include, set up some filters, group the data, then print or export or save the report format to run again later!



# Report Writer - a Step-by-Step Primer

## Creating a Report in Report Writer

1. Select the table of data you wish to run the report using.
2. Click on "Display Report". (This will display the default data for that table - which COULD be every field in that table.)
3. Use the Column Chooser to select the fields you need in your report, and select the order in which you want them to appear.

**Column Chooser**

**Selected Columns**

- ☐ Address 1
- ☐ Address 2
- ☒ Attribute
- ☐ Attribute Notes
- ☐ Attribute SortOrder
- ☐ Background Check
- ☒ Caregiver
- ☐ City
- ☐ Class
- ☒ Classification
- ☐ County
- ☐ Created
- ☐ Select All
- ☐ Remove All

**Column Order**

- Caregiver
- Gender
- Classification
- Attribute

OK Cancel

**3** Column Chooser Export Print Preview Print Save Report Load Report

Choose Report Source : Caregiver Attributes **1** Display Report **2**

All A B C D E F G H I J K L M N O P Q R S T U V W X Y Z

In this scenario, I need a list of all active caregivers who don't have ANY Attributes designated to them.

Column Chooser Export Print Preview Print Save Report Load Report

Choose Report Source : Caregiver Attributes Display Report

☐ All Records Status : A

All A B C D E F G H I J K L M N O P Q R S T U V W X Y Z

Drag a column header and drop it here to group by that column

◀ ◁ 1 2 3 4 ▷ ▶

349 items in 4 page

Caregiver ▼	Gender ▼	Classification ▼	Attribute ▼
Adams, Alicia	F	CNA	
Armstrong, Sadie	F	HHA	Alzheimers - Dementia
Armstrong, Sadie	F	HHA	Housekeeping - Light
Armstrong, Sadie	F	HHA	Housekeeping - Heavy
Armstrong, Sadie	F	HHA	Transportation

# Report Writer - a Step-by-Step Primer

## Creating a Report in Report Writer, cont'd.

- Note that the resulting data is on multiple pages. To see ALL of the data on ONE page, place a checkmark in the "All Records" checkbox at the upper left.
- By default, this is only showing me the ACTIVE caregivers - change that Status to what you need in your report (in this case, Active, Inactive, or All).
- The alpha filter allows you to quickly filter this data to (in this case) those caregivers with a last name starting with a certain letter.

Now - let's look at further filtering capabilities....

Column Chooser Export Print Preview Print Save Report Load Report

Choose Report Source : Caregiver Attributes Display Report

☐ All Records Status : A

All A B C D E F G H I J K L M N O P Q R S T U V W X Y Z

Drag a column header and drop it here to group by that column

◀ 1 2 3 4 ▶▶ 349 items in 4 pages

Caregiver ▼	Gender ▼	Classification ▼	Attribute ▼
Adams, Alicia	F	CNA	
Armstrong, Sadie	F	HHA	Alzheimers - Dementia
Armstrong, Sadie	F	HHA	Housekeeping - Light
Armstrong, Sadie	F	HHA	Housekeeping - Heavy
Armstrong, Sadie	F	HHA	Transportation

# Report Writer - a Step-by-Step Primer

## Creating a Report in Report Writer, cont'd.

7. You can further filter this data by using the small 'funnel' icons to the right of every column header. In this scenario, I'm going to filter to those caregivers who have ZERO Attributes. So I clicked on the funnel to the right of the "Attribute" column header, and selected to filter to those where it's "(Empty)" - and then clicked OK. Now I know that I only have two caregivers that need to have their Attributes set up. (You can filter on multiple columns at once.)

You can also sort and group the data - let's take a look at that next.

☐ All Records      Status : A ▼

All A B C D E F G H I J K L M N O P Q R S T U V W X Y Z

Drag a column header and drop it here to group by that column

◀ 1 ▶▶

46 items in 1 page

Caregiver ▼	Gender ▼	Classification ▼	Attribute ▼ 7
Simpson, Geneva		LPN	Care Management

Attribute

☐ Check All

☒ (Empty)

☐ Alzheimers - Dementia

☐ Assist with Bathing

☐ Care Management

OK Cancel

Drag a column header and drop it here to group by that column

◀ 1 ▶▶

2 items in 1 pages

Caregiver ▼	Gender ▼	Classification ▼	Attribute ▼
Smith, Nancy	F	HHA	
Sunshine, Sally	F	CNA	

## Report Writer - a Step-by-Step Primer

Column Chooser
 Export
 Print Preview
 Print
 Save Report
 Load Report

Choose Report Source : Caregiver Pay Rates ▼
Display Report
☒ Payroll Assigned ☐ Payroll Unassigned

☒ All Records
 Status : A ▼

All
ABCDEFGHIJKLMNOPQRSTUVWXYZ

In this scenario, I want to see a list of all active caregivers, and what their current payroll items are. I've selected the "Caregiver Pay Rates" table as my Report Source, and selected that I wish to see the assigned payroll items (as opposed to those caregivers who don't have ANY payroll items assigned - which could ALSO come in handy). You can see they are all out of order.

8. **SORTING:** You can sort and/or group the data by any of the fields you have chosen to display. Click on any column header name (ex. “Caregiver”) to sort that column. That little black arrow shows that the column is now sorted a-z. (You can click on it twice to reverse the sort...)

A screenshot of a web application showing a table with the heading "All Records". The table has a blue header row with columns labeled "All", "A", "B", "C", "D", "E", "F", and "G". The "All" column is highlighted with a blue background. A red circle with the number "8" is placed over the "All" column header, and a red arrow points to it from below. Below the header, the first row of data is visible, starting with "Caregiver" followed by a dropdown arrow. The data rows show names like "Johnson, Steve" and "Maldonado, Kathryn".

The screenshot shows a table with a column header 'Caregiver' and a list of names 'Adams, Alicia' below it. A red circle highlights an upward-pointing arrow icon next to the 'Caregiver' header, indicating a sorting action.



# Report Writer - a Step-by-Step Primer

You can also place this data in groups -

9. **GROUPING:** If you wish to group by caregiver name, just point at and left-click on the “Caregiver” column header - and drag that column header name to the line above - where it says “... drop it here....”

You can expand each group (caregiver) by clicking on the arrow to the left of their name.

Choose Report Source : Caregiver Pay Rates    Display Report    ☒ Payroll Assigned    ☐ Payroll Unassigned

☒ All Records    Status : A

Al A B C D E F G H I J K L M N O P Q R S T U V W X Y Z

Drag a column header and drop it here to group by that column    9

Caregiver	Classification	Item Name	Default	Rate
Johnson, Steve		Adult Care	N	10.0000
Johnson, Steve		No Pay	N	0.0000
Johnson, Steve		Orientation	N	12.0000
Johnson, Steve		Travel Time	N	12.5000
Denton, Gideon		Travel Time	N	10.0000
Maldonado, Kathryn	Companion	Couple Care - Exempt	N	0.0000
Maldonado, Kathryn	Companion	Hourly	N	15.0000

☒ All Records    Status : A

Al A B C D E F G H I J K L M N O P Q R S T U V W X Y Z

Caregiver    Classification    Item Name

▶ Caregiver: Adams, Alicia

▶ Caregiver: Armstrong, Sadie

▼ Caregiver: Auker, Lisa

Auker, Lisa	CNA	Adult Care
Auker, Lisa	CNA	Adult Care Ho
Auker, Lisa	CNA	Care Management

Click the arrow next to the name to collapse or expand the grouping.

# Report Writer - a Step-by-Step Primer



Column Chooser



Export



Print Preview



Print



Save Report



Load Report

## Export to XLS

this will export the current page out to Excel. Note: You are not able to export to Excel any data that includes grouping, so be sure to 'un-group' any data prior to exporting to XLS. (You CAN export filtered & sorted data.)

	A	B	C	D
1	Caregiver	Classification	Item Name	Default
2	Adams, Alicia	CNA	Attendant Care	N
3	Adams, Alicia	CNA	Attendant Care Hourly	N
4	Adams, Alicia	CNA	Care Management	N
5	Adams, Alicia	CNA	Full Live-In	N
6	Adams, Alicia	CNA	Gen Payroll	N
7	Adams, Alicia	CNA	Hourly	N
8	Adams, Alicia	CNA	Hourly 1-1-2017	N
9	Adams, Alicia	CNA	Hourly 11-1-2017	N
10	Adams, Alicia	CNA	Hourly Wage - LIVE IN	N
11	Adams, Alicia	CNA	Hourly Wage Live-In 2	N
12	Adams, Alicia	CNA	Hourly Wage-LIVE IN WE	N
13	Adams, Alicia	CNA	No Pay	N
14	Adams, Alicia	CNA	November Hourly Rate	N
15	Adams, Alicia	CNA	Orientation	N
16	Adams, Alicia	CNA	Overnight	N
17	Adams, Alicia	CNA	Travel Time	N

## Save Report

Like what you've set up? Want to run this report again? Click "Save Report" and give it a name...

### Save Report

Please enter a file name

OKCancel

## Print Preview/Print

You can print the data you have grouped, filtered, & sorted. You may wish to do a Print Preview first to see how it will look. (It will have your company name & logo at the top if you have that set up in Company Settings.)

 <b>The GenSuccess Agency</b>			
Caregiver	Classification	Item Name	Default
Adams, Alicia	CNA	Attendant Care	N
Adams, Alicia	CNA	Attendant Care Hourly	N
Adams, Alicia	CNA	Care Management	N
Adams, Alicia	CNA	Full Live-In	N
Adams, Alicia	CNA	Gen Payroll	N
Adams, Alicia	CNA	Hourly	N
Adams, Alicia	CNA	Hourly 1-1-2017	N
Adams, Alicia	CNA	Hourly 11-1-2017	N
Adams, Alicia	CNA	Hourly Wage - LIVE IN	N
Adams, Alicia	CNA	Hourly Wage Live-In 2	N

## Load Report

... and load it up again later!

### Load Report

Caregiver Payroll Item Review  
Caregiver Shifts First Quarter  
cgs not working or on disability  
Clients - Excluded/Preferred CG's  
QA Missed Notes  
Timesheet - Comp Billing and Payroll

OKDeleteCancel

## More Resources

Additional Information on Reports in Generations can be found in the User Documentation...

There are also several Training Videos on the topic...



### ▼ Reports

- Reports Overview
- ▶ Report Calculations
- ▶ Report Parameters
- Confirmation Regarding Mass Emails
- E-mailing Reports
- Mailing Labels
- Management Reports
- Monthly Reports
- On-Call Reports
- Report Writer

Look for  
**Reports** in the  
Table of  
Contents...



Category	Title	Duration
Reporting	Billing Reports	5.22
Reporting	Call Center Reports	4.24
Reporting	Client Reports	5.02
Reporting	Mailing Labels	2.17
Reporting	Overview & Browser Settings	6.45
Reporting	Report Writer	4.08
Reporting	Scheduling Reports	7.23
Reporting	Telephony Reports	3.46
Reporting	Timesheet/Payroll Reports	3.25



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# Best Practices

Reports are often a crucial part of the best practice for accomplishing things - such as billing/claims & pay to caregivers.

Some reports will most often be used by billing or payroll people, some by HR or marketing staff, some by schedulers, and some only by administrative staff. Make sure that Security is set up appropriately for those people.

Remember... G.I.G.O. Accuracy & consistency in data entry counts!

Mark the reports you'll use over & over again as your favorites - then you can just go to the (much shorter) "favorites" list to select & generate the report.

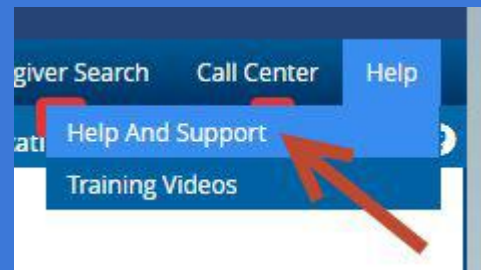
**PLAY.** Experiment with the filters & other capabilities in the report parameters - so you can get the data & metrics you need!

# Need assistance?

## Contact support using Live Chat (M-F 9-5 EST)

- Available from the Help area in Generations, or from
- [www.idb-sys.com](http://www.idb-sys.com) OR [www.homecaresoftware.com](http://www.homecaresoftware.com)
- Email: [support@idb-sys.com](mailto:support@idb-sys.com)
- Phone: 989-546-4512

For emergency after-hours support - reach our on-call staff at 989-546-4512 x1





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