GENERATIONS®

Homecare System

Presenter

Customer Success Manager

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GENERATIONS Homecare System

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

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!

GENERATIONS Homecare System

Areas in which you can generate reports:

WHERE?

- 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

And, of course…

- Reports (“Canned Reports”)
- Report Writer

Report Formats Available

PDF **Excel** **Word** **RTF**

Excel Data **Email**

HOW?

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.

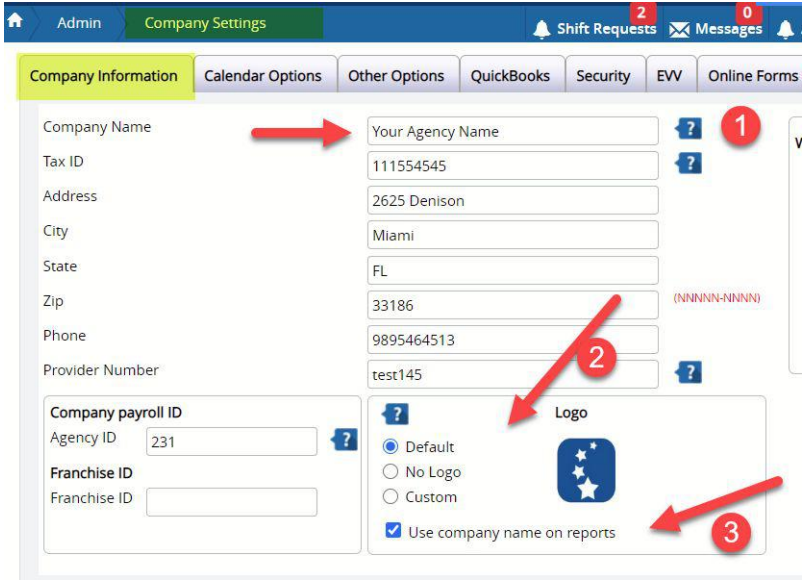
Word
Creates the report in Word format - helpful if you wish to augment the report headers, or add additional information beyond the data in the report itself.

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



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

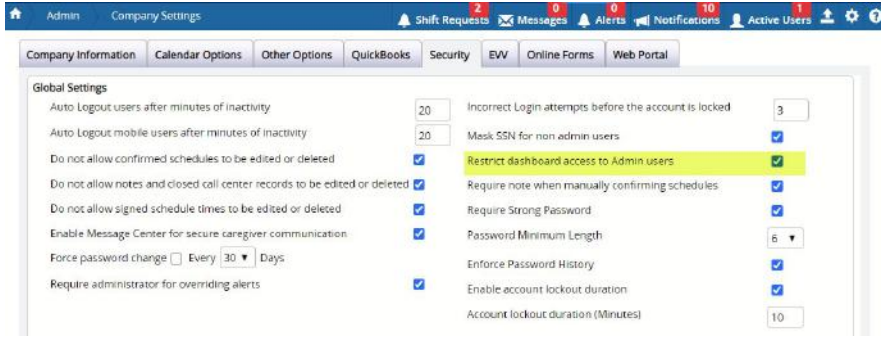
Download your company logo to have it appear on reports, or on your caregiver badges.

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.



Location | Class | Groups

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

WHO?

Check to assign permission and uncheck to remove permission

Running Reports

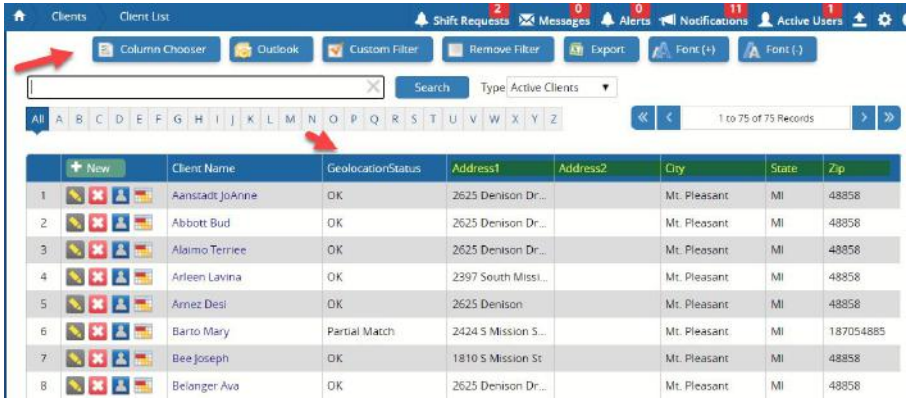
Now that we've covered the why, where, how & who… let's look at the …

WHAT?

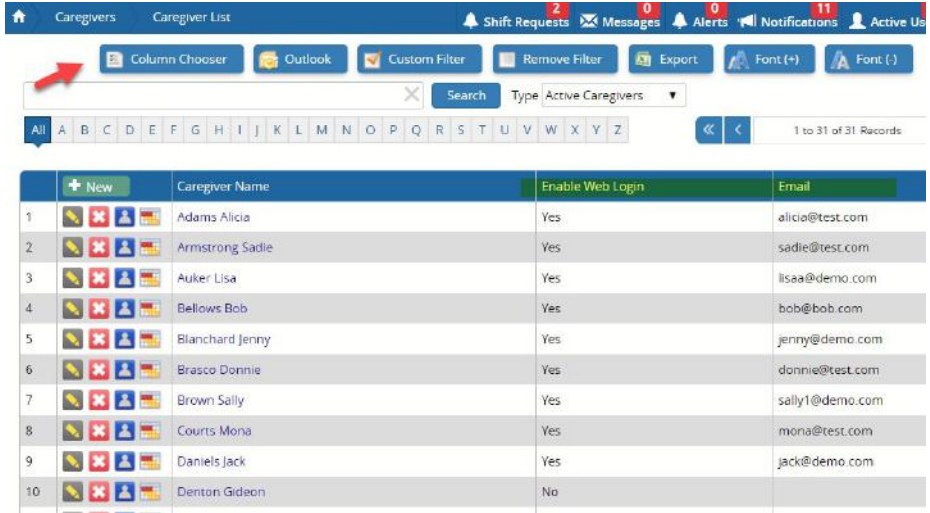
- From Lists
- Dashboard
- Payroll Export/Billing Export
- EVV
- Audit Trails
- Caregiver Search
- "Canned" reports
- Report Writer

Quick & Easy - from Lists

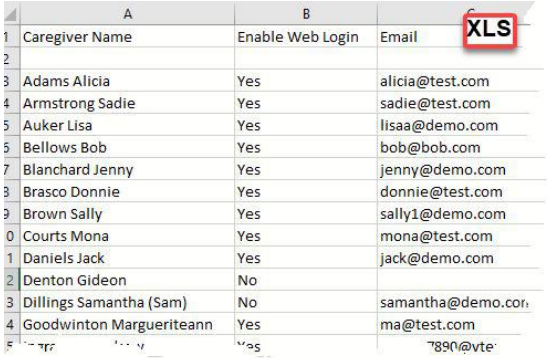
Example
Perhaps you want to ensure that all clients have a good geolocation for EVV (and caregiver search) purposes:



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...)



Export out to Excel (XLS)



All names are purely fictional

Quick & Easy from Lists

Ability to export to XLS is available in these areas:

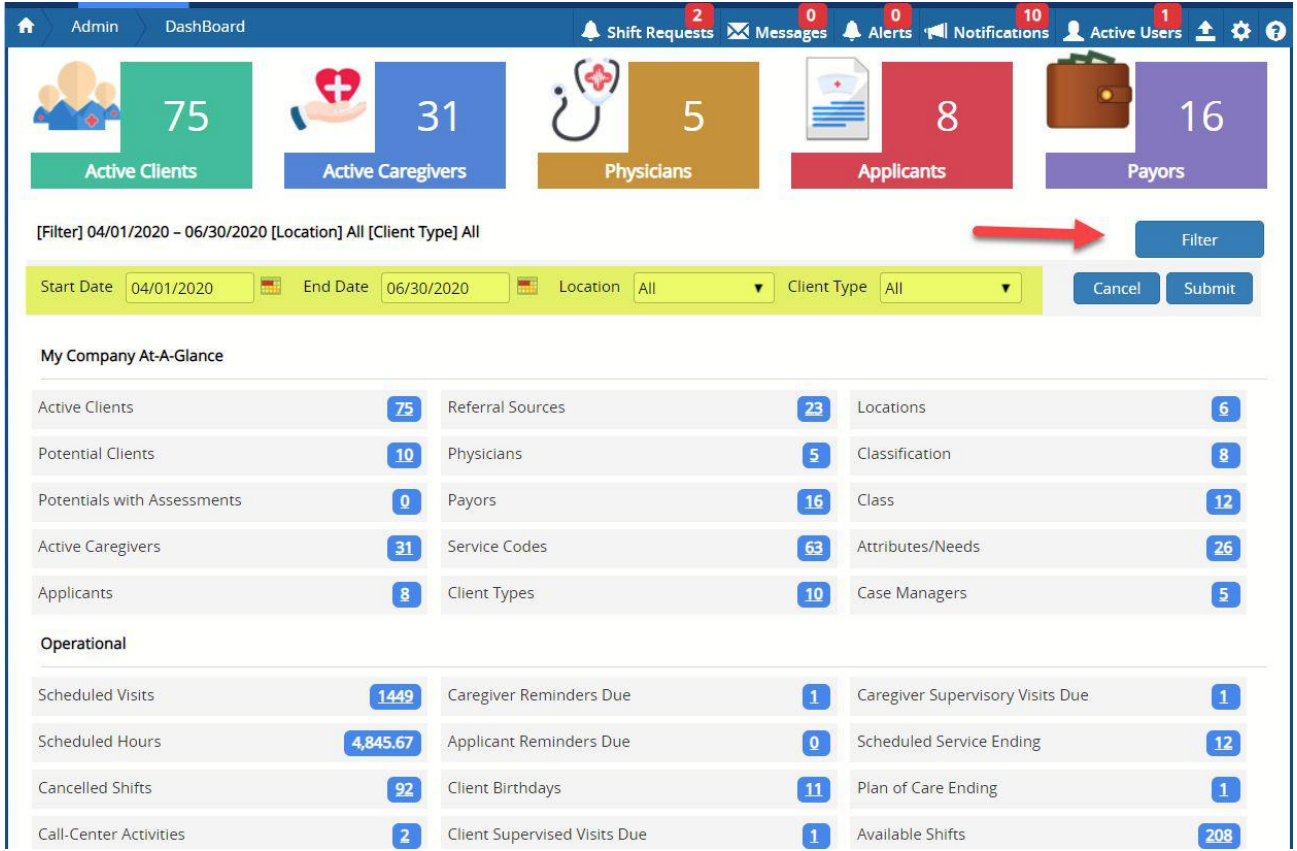
BOLD indicates Column Chooser Capability

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

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 <u>underlined</u> will either take you to that area of the system, OR run a report to display that metric.

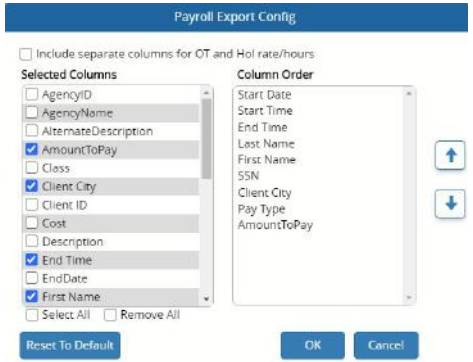
(Example: Clicking on the “1449” listed under Scheduled Visits results in the generation of a “Schedules by Date” report for the filtered criteria.)

Payroll & Billing Exports

Payroll Export Config

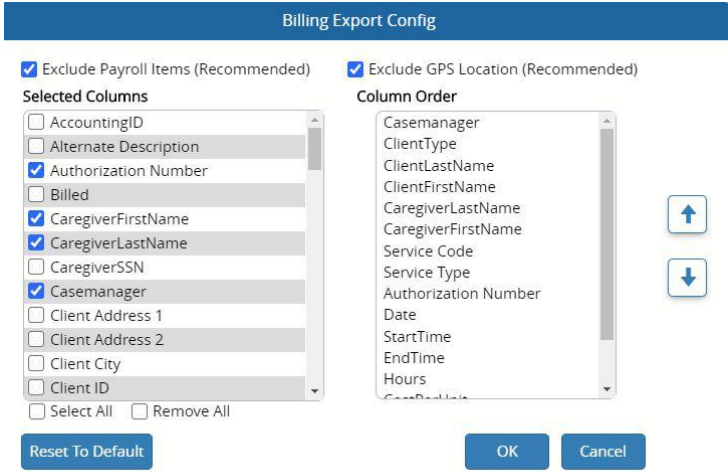
There are default, ‘canned’ exports that are designed to meet the requirements of certain 3rd-party payroll vendors, such as Paychex or ADP. If you work with a different 3rd party, or need to create an export of payroll data that is different than the canned defaults, you can create your own format by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

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



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.

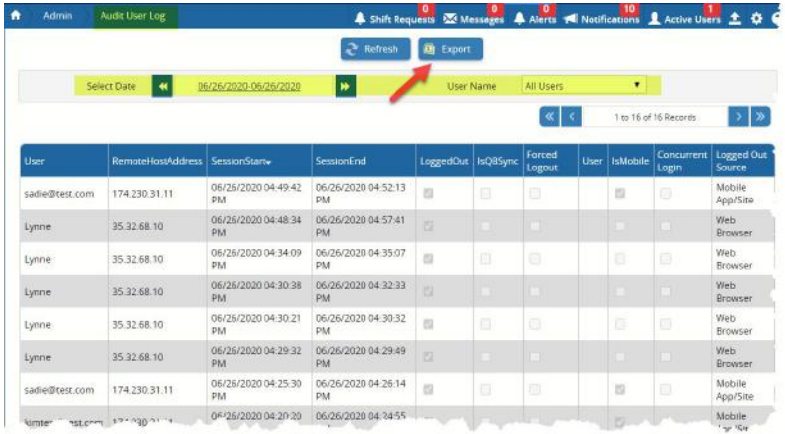


Note: Billing & Payroll exports are based on Timesheets (not schedules).

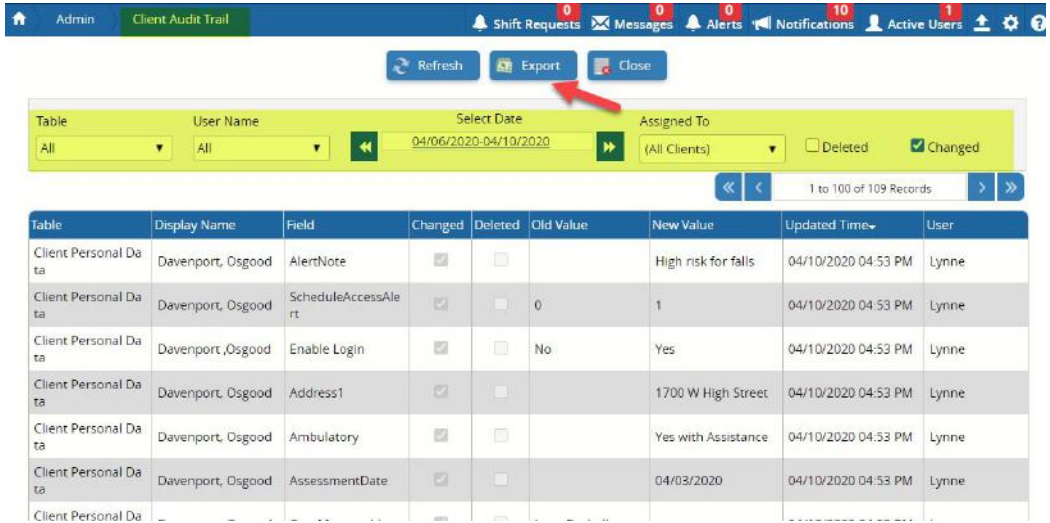
Audit Trails

You can export to XLS from:

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



Audit User Log



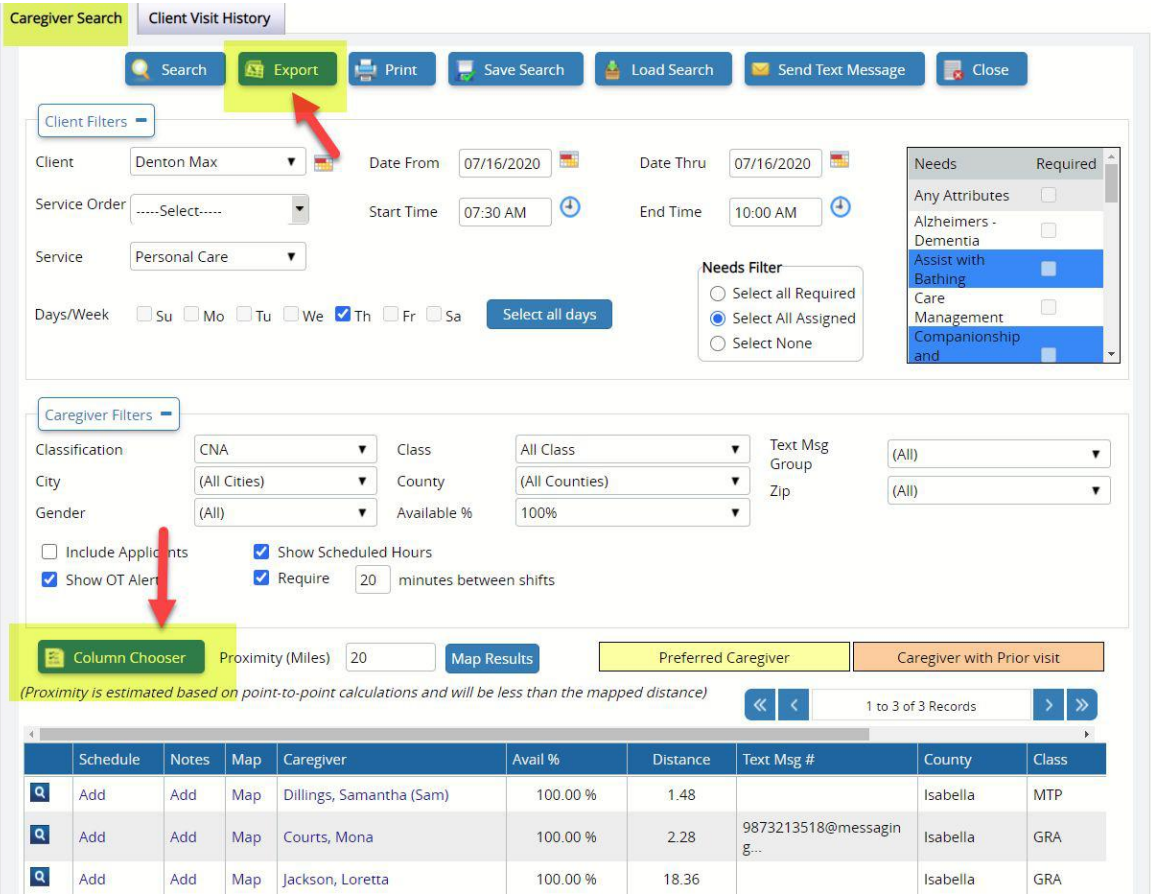
Client Audit Trail

Caregiver Search

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

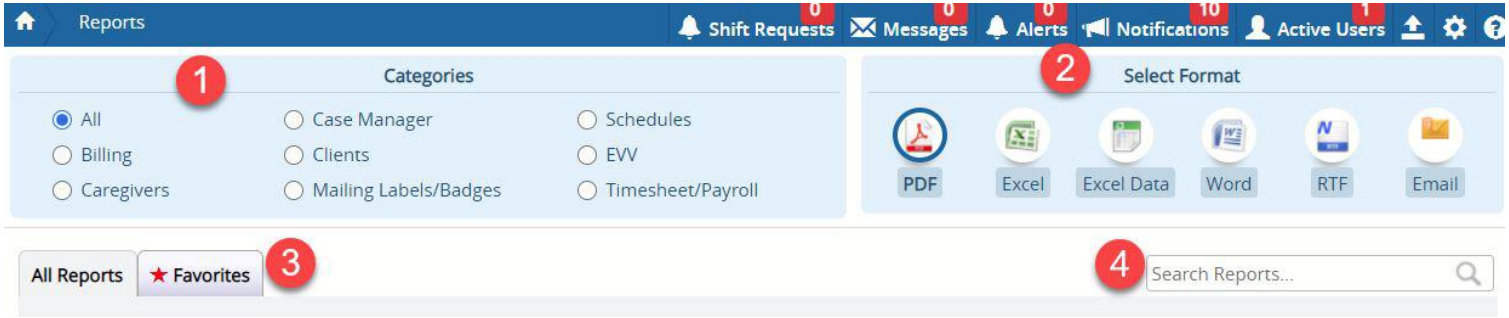
In this example, I've filtered to *several* things.

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



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”

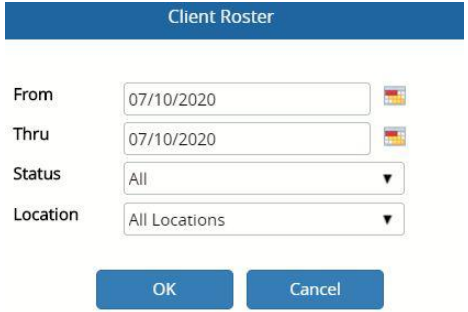


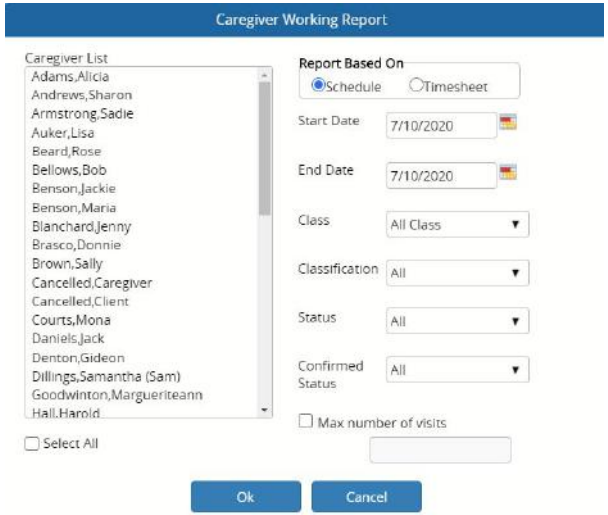
The Basics:

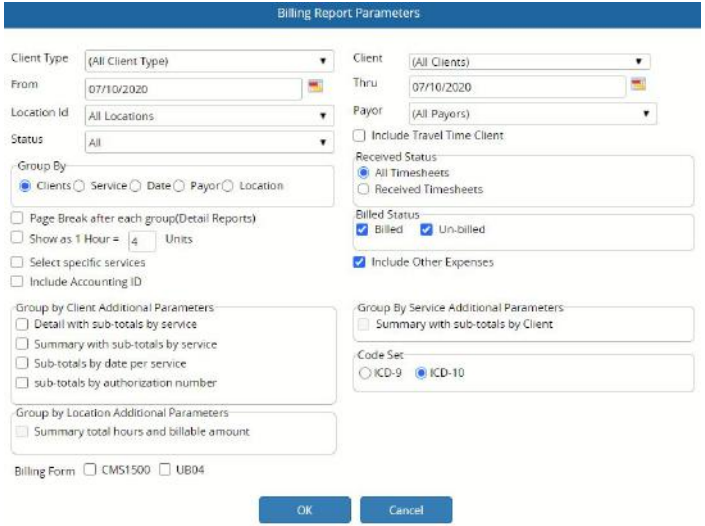
1. Choose the category of report you wish to run…
2. Select the Format you wish to generate it in…. (PDF is the default)
3. If it’s a report you’ll run often, mark it as a favorite - that way it’ll be easier to find by filtering the list of ALL reports to just your favorites!
4. Looking for something 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.







“Canned” Report Highlights

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

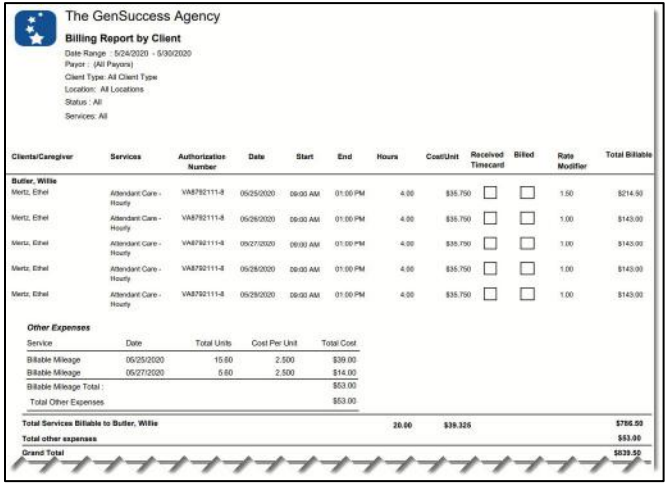
Billing/Claims:

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)



The GenSuccess Agency

Billing Report by Client

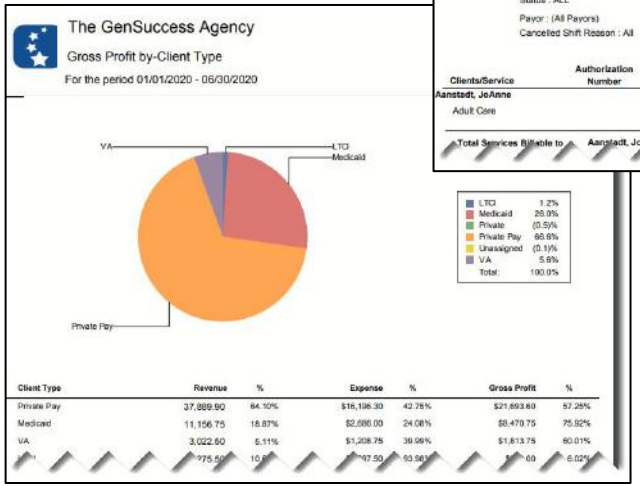
Date Range : 5/24/2020 - 5/30/2020
Payor : (All Payors)
Client Type: All Client Type
Location: All Locations
Status : All
Services: All

Clients/Caregiver	Services	Authorization Number	Date	Start	End	Hours	Cost/Unit	Received Timecard	Billed	Rate Modifier	Total Billable
Butler, Willie											
Mertz, Ethel	Attendant Care - Hourly	VA8792111-8	05/25/2020	09:00 AM	01:00 PM	4.00	$35.750	☐	☐	1.50	$214.50
Mertz, Ethel	Attendant Care - Hourly	VA8792111-8	05/26/2020	09:00 AM	01:00 PM	4.00	$35.750	☐	☐	1.00	$143.00
Mertz, Ethel	Attendant Care - Hourly	VA8792111-8	05/27/2020	09:00 AM	01:00 PM	4.00	$35.750	☐	☐	1.00	$143.00
Mertz, Ethel	Attendant Care - Hourly	VA8792111-8	05/28/2020	09:00 AM	01:00 PM	4.00	$35.750	☐	☐	1.00	$143.00
Mertz, Ethel	Attendant Care - Hourly	VA8792111-8	05/29/2020	09:00 AM	01:00 PM	4.00	$35.750	☐	☐	1.00	$143.00

Other Expenses

Service	Date	Total Units	Cost Per Unit	Total Cost
Billable Mileage	05/25/2020	15.60	2.500	$39.00
Billable Mileage	05/27/2020	5.60	2.500	$14.00
Billable Mileage Total :				$53.00
Total Other Expenses				$53.00

Total Services Billable to Butler, Willie	**20.00**	**$39.325**	**$786.50**
Total other expenses			**$53.00**
Grand Total			**$839.50**



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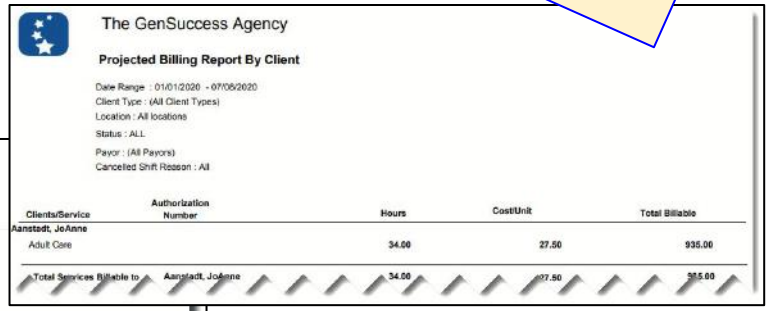
Gross Profit by-Client Type

For the period 01/01/2020 - 06/30/2020

Client Type	Revenue	%	Expense	%	Gross Profit	%
Private Pay	37,889.90	64.10%	$16,196.30	42.75%	$21,693.60	57.25%
Medicaid	11,156.75	18.87%	$2,686.00	24.08%	$8,470.75	75.92%
VA	3,022.50	5.11%	$1,208.75	39.99%	$1,813.75	60.01%
[illegible]	975.50	10.[illegible]	[illegible]7.50	93.98%	[illegible].00	6.02%



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Projected Billing Report By Client

Date Range : 01/01/2020 - 07/06/2020
Client Type : (All Client Types)
Location : All locations
Status : ALL
Payor : (All Payors)
Cancelled Shift Reason : All

Clients/Service	Authorization Number	Hours	Cost/Unit	Total Billable
Aanstadt, JoAnne				
Adult Care		34.00	27.50	935.00
Total Services Billable to Aanstadt, JoAnne		**34.00**	**27.50**	**935.00**

“Canned” Report Highlights

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

Pay to Caregivers: Timesheet Detail by Pay Period
Caregiver Other Expenses
Overtime

**based on Timesheets, shows total payable
payable other expenses
based on Timesheets, shows caregivers with OT

The GenSuccess Agency
Timesheet Detail Report for Blanchard, Jenny Ordered By Client

Payroll Week(s) : 05/24/2020 - 05/30/2020 Class : All Class
Classification : (All) Location : All Locations

Caregivers /	Clients	Location	Date	Start	End	rec'd	paid	Reg hours/ rate		Ot hours/rate		Hol hours/rate		total hours	
Blanchard, Jenny															
Reagan, Norman	:Hourly	HER	05/24/2020	07:00 AM	10:00 AM	☐	☐	3.00	$ 12.50	0.00		0.00		3.00	
Reagan, Norman	:Hourly	HER	05/25/2020	07:00 AM	10:00 AM	☐	☐	0.00		0.00		3.00	$ 18.75	3.00	
Reagan, Norman	:Hourly	HER	05/26/2020	07:00 AM	10:00 AM	☐	☐	3.00	$ 12.50	0.00		0.00		3.00	
Reagan, Norman	:Hourly	HER	05/27/2020	07:00 AM	10:00 AM	☐	☐	3.00	$ 12.50	0.00		0.00		3.00	$ 37.50
Reagan, Norman	:Hourly	HER	05/28/2020	07:00 AM	10:00 AM	☐	☐	3.00	$ 12.50	0.00		0.00		3.00	$ 37.50
Reagan, Norman	:Hourly	HER	05/29/2020	07:00 AM	10:00 AM	☐	☐	3.00	$ 12.50	0.00		0.00		3.00	$ 37.50
Reagan, Norman	:Hourly	HER	05/30/2020	07:00 AM	10:00 AM	☐	☐	3.00	$ 12.50	0.00		0.00		3.00	$ 37.50
total hours for pay period			05/24/2020 - 05/30/2020					18.00	$ 225.00	0.00	$ 0.00	3.00	$ 56.25	21.00	$ 281.25

Other Expenses - Blanchard, Jenny

Client	Date	Description1	Total Units	Cost Per Unit	Total Cost
Reagan, Norman	05/26/2020	Supply Reimbursement	13.76	1.00	$ 13.76
Total			**13.76**		**$ 13.76**

Blanchard, Jenny **total hours for all clients** **18.00** **$ 225.00** **0.00** **$ 0.00** **3.00** **$ 56.25** **21.00** **$ 281.25**

The GenSuccess Agency
Timesheet Report Summarized by Payroll Item
06/28/2020 - 07/04/2020

Caregiver : Bellows, Bob Class : All Class
Classification : (All) Location : All Locations

Employee	IC	Payroll Item	Reg Hours	Regular Rate	Regular Total	OT Hours	OT Rate	OT Total	Holiday Hours	Holiday Rate	Holiday Total	Grand Total
Bellows, Bob	☐	Attendent - VIP	4.00	$ 33.50	$ 134.00	0.00	$ 0.00	$ 0.00	0.00	$ 0.00	$ 0.00	$ 134.00
Totals for Bellows, Bob			4.00		$ 134.00	0.00		$ 0.00	0.00		$ 0.00	$ 134.00

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Timesheet Summary Report for (All Caregivers) Ordered By Client

Payroll Week(s) : 06/28/2020 - 07/04/2020 Class : All Class
Classification : (All) Location : All Locations

Caregiver	IC		Reg. Hours	OT Hours	Holi Hours	Total Hours
Auker, Lisa						
	☐	06/28/2020 - 07/04/2020	16.00	0.00	0.00	16.00
Total hours for	Auker, Lisa		**16.00**	**0.00**	**0.00**	**16.00**
Bellows, Bob						

“Canned” Report Highlights

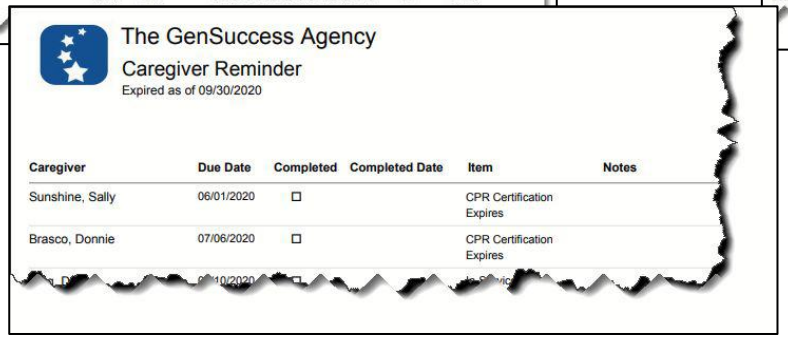
HR: (caregivers)

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

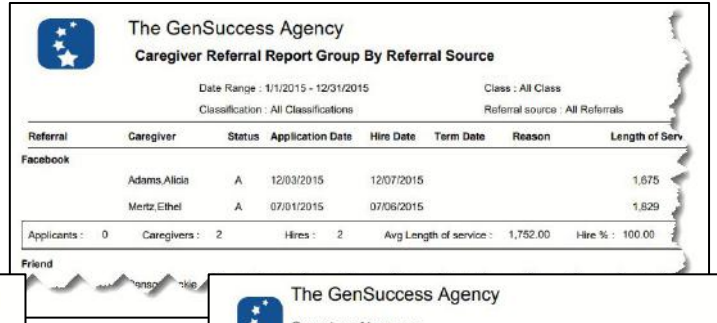
The GenSuccess Agency
Caregiver Working Report (Timesheet)
Date Range : 1/1/2020 - 7/8/2020 Class : All
Classification : HHA Status : Active

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	06/28/2020	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



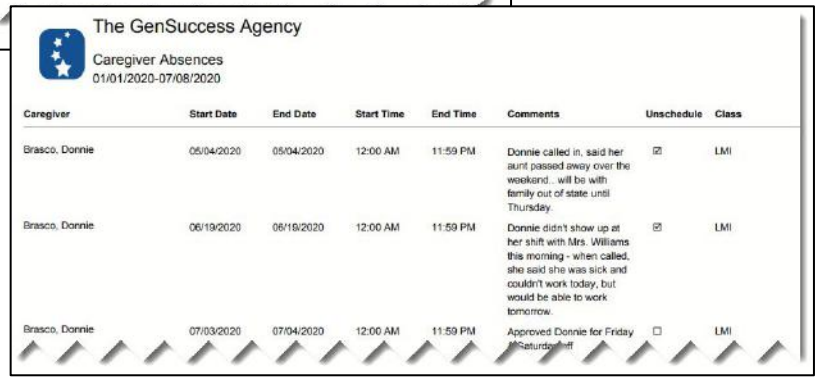
The GenSuccess Agency
Caregiver Reminder
Expired as of 09/30/2020

Caregiver	Due Date	Completed	Completed Date	Item	Notes
Sunshine, Sally	06/01/2020	☐		CPR Certification Expires	
Brasco, Donnie	07/06/2020	☐		CPR Certification Expires	



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			1,829
Applicants : 0	Caregivers : 2		Hires : 2	Avg Length of service : 1,752.00		Hire % : 100.00	
Friend							



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	06/04/2020	06/04/2020	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.	☑	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.	☑	LMI
Brasco, Donnie	07/03/2020	07/04/2020	12:00 AM	11:59 PM	Approved Donnie for Friday [illegible]	☐	LMI

“Canned” Report Highlights

Client Care:

Client Notes	Documentation by date
Plan of Care/CMS485	Care Plan
Supervisory Visits Due	Who has a Supervisory Visit Coming Up?
Plan of Care Ending	Who has a Care Plan expiring soon?
Service Order Ending	Who has an authorization expiring soon?
Hospitalizations/ER Visits	Details, summary, and re-admission percentages

The GenSuccess Agency
2625 Denison Miami FL 33186
(989)546-4513

Care Plan For JoAnne Aanstadt

Aanstadt, JoAnne

Client Information

Name: JoAnne Aanstadt DOB: 03/17/1935 Start Of Care: 11/25/2013 DNR ☐
Phone: 987-879-2135 Phone2: Location: MT1
Diagnosis: Unspecified jaundice EVV 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 Specialty: Pulmonologist Phone: 989-547-8744
Address: 2309 Adams Avenue, Alma , MI 49344 Alt Phone: 641-845-6215

Name: Carolyn Carr, MD Specialty: Geriatrics Phone: 646-646-6466
Address: 28 W. Adams, Suite 102, Detroit, MI, 40358 Alt Phone: 123-987-4568

Name: Dr. Eric Taylor Specialty: Internal Medicine Phone: 879-879-2165
Address: 1001 South Street, Suite 101, Mt. Pleasant, MI, 48858 Alt Phone:

Medications

Drug	Dose	Frequency	Route	Order Type	Start Date	DC Date

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Hospitalizations and ER Visits
Date : 01/01/2020 - 07/08/2020 Location : All
Client : All

Hospitalization Re-Admission and Prevention

# Clients Hospitalized within 30 days SOC	No. of Clients with Re-admissions within 30 days	Re-admission %

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Client statistics
01/01/2020-07/08/2020

Clients Service Statistics

Total Clients Serviced:	35.00	Location: ALL
Total Client Hours:	9,364.42	
Total Males Serviced:	15	
Total Females Serviced:	8	
Average Patient Age:	84	

Clients serviced by Priority

Priority	Serviced Clients	Active Clients	Scheduled Hours
		12	2,313.75
		2	0.0

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Service Orders Ending Summary
07/08/2020 - 12/31/2020

Client : All Clients
Service Order Status : (All)
Client Type : (All Client Type)
County : (All Counties)
Location : All Locations
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	Michigan Medi	Adult Care	06/24/20	07/31/20	482

“Canned” Report Highlights

Scheduling:	Available Shifts	See which shifts you need to fill
	Calendar Report	Print or send schedules on a calendar to clients/caregivers
	Mini-Schedule	Just a different view of schedules
	Charting Report	See the detailed notes entered by your caregivers/nurses
	Completed Schedules & Tasks	Shows EVV data, tasks completed, etc.
	Scheduled Service Ending	Displays last scheduled service
	Screening Report	Screening Results
	Wellness Report	Show Wellness questions assigned to schedules

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Completed Tasks By Date

06/01/2020-07/08/2020 | Case Manager : All Case Managers
Status : A | Location: All Locations
Client : All Clients | Client Type : All Client Type
Caregiver : All Caregivers | Payor: All Payors

Aanstadt, JoAnne

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

Other Expenses

Description	totalUnits
Billable Mileage	50.00
Total Units	50.00

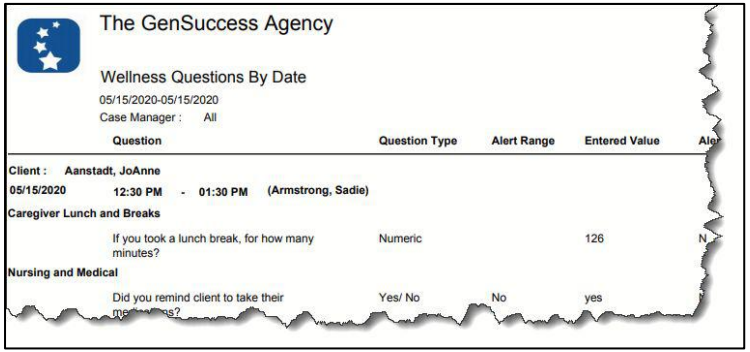
Signed Time and Tasks:
06/22/2020 09:30 AM - 10:00 AM

Task	Required	Completed	Updated By	Last Updated
Encourage fluids		√	Auker, Lisa	06/22/2020 09:30 AM
Prepare & serve lunch	√	√	Auker, Lisa	06/22/2020 09:30 AM

Visit Notes
Here's my note.

Caregiver Signature | Client Signature
Signature Date : 06/22/2020 | Signature Date : 06/22/2020

Total Hours | Other 15 mins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Wellness Questions By Date
05/15/2020-05/15/2020
Case Manager : All

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

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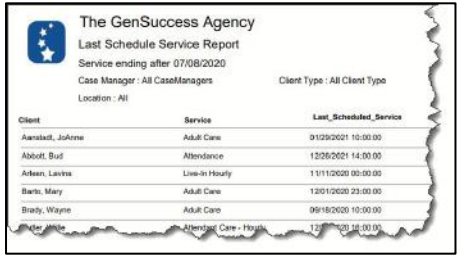
Caregiver Mini-Schedule

07/08/2020 - 07/11/2020

Adams, Alicia | 770-438-0505 | 989-400-1365
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
[illegible]	Th	[illegible]	[illegible]	[illegible]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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	12/25/2021 14:00:00
Arlean, Lavina	Live-In Hourly	11/11/2020 00:00:00
Barto, Mary	Adult Care	12/01/2020 23:00:00
Brady, Wayne	Adult Care	09/18/2020 10:00:00
[illegible]	Attendant Care - Hourly	[illegible]

“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)

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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	PhoneNumber	Note Type	Created By	Updated By	Xfer To Note	Assigned To	Du
☑	06/04/2020 02:34:00 PM	06/04/2020 02:34:00 PM	Anna Lewis	123-456-7890	Phone Call Made	Lynne		☑	(ALL)	
	Called & spoke with Anna about the health fair scheduled for September.									
☐	07/09/2020 12:46:00 PM		Judy Klements	977-987-9777	Email Received	Lynne		☑	(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 930a to drop them off. (Also want to get a look at what else is going to be in that packet...) Taking									

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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	989-745-8547	Cue, Suzy	I
	Referral Agency	Jones, Sam	12/05/2019	11/28/2019	12/01/2019	30018	M.O.W. Sr Outreach Svcs	989-745-8547	Murphy, Hazel	A
	Referral Agency	Phillips, Tammy	05/01/2020	04/28/2020	04/30/2020	984651	M.O.W. Sr Outreach Svcs	989-745-8547	Lane, Rosa	A

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Client Inquiries And Assessments Report **All clients**

Date Range : — 05/01/2020-07/09/2020

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	05/15/2020	05/16/2020	05/17/2020		A	989-555-5555	Spring Health Fair
Charmayne Smith	Phillips,Tammy	Johnson,Donna	07/08/2020			Pending Assessment	P	888-777-9999	Judy Klements

Report Summary

Inquiries	—	2
Inquiries with assessments	—	1
Inquiry conversion ratio	—	50 %
Assessment / Inquiry ratio	—	50 %
Assessment conversion ratio	—	100 %

“Canned” Report Highlights

Mailing Labels

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

Formats Available

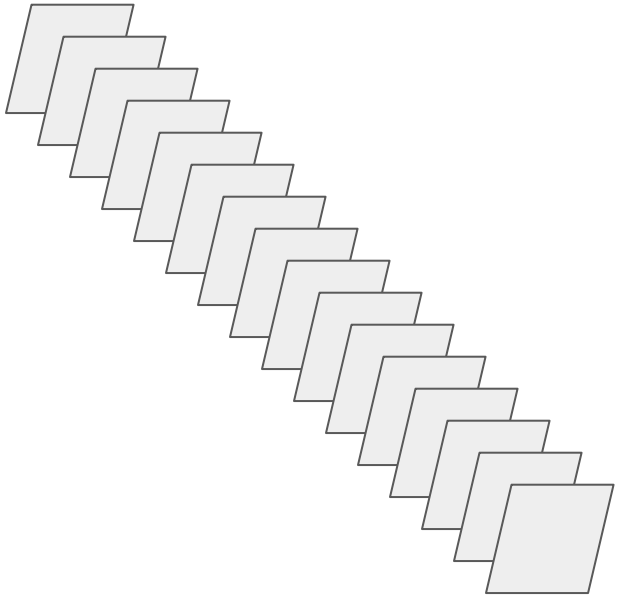
- 5163
- 5260
- 5261
- 5262

(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

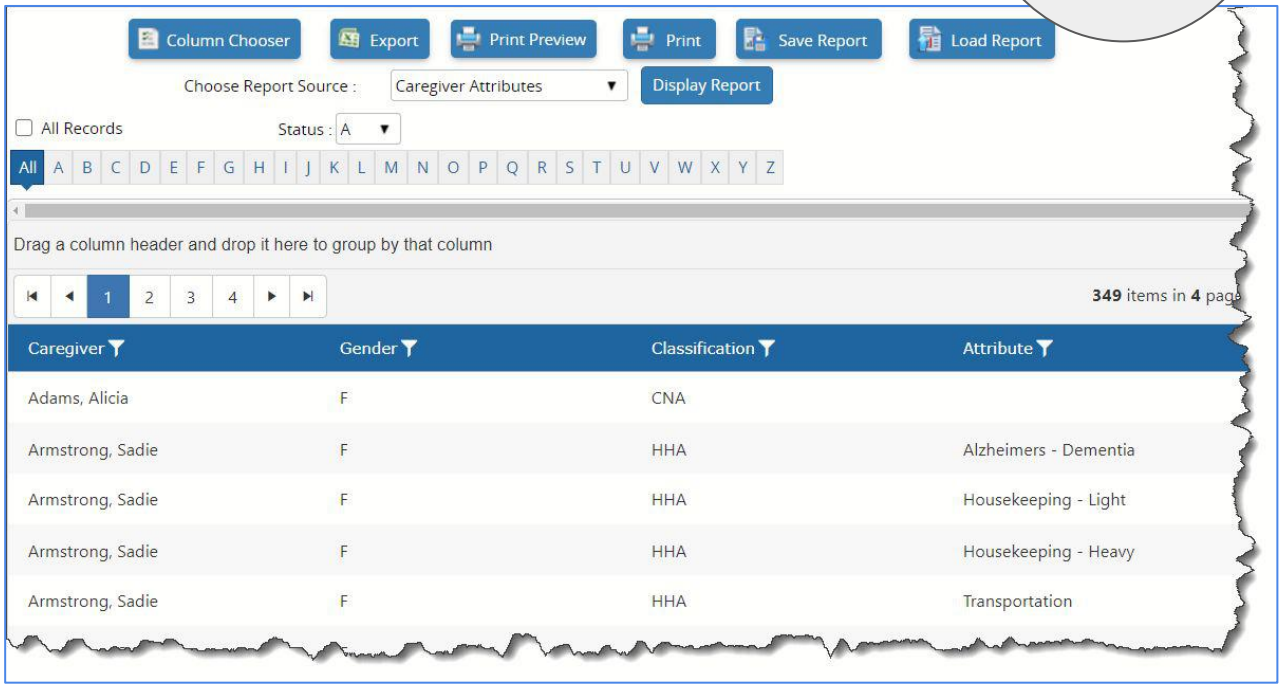
Creating a Report in Report Writer

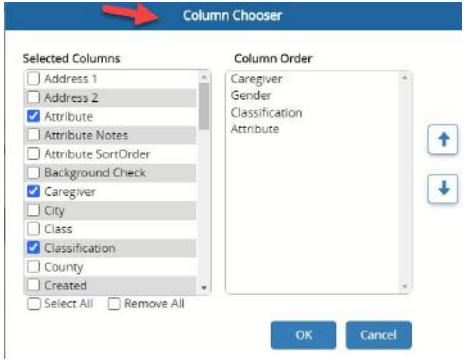
1. Select the table of data you wish to run the report using.

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.

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





Report Writer - a Step-by-Step Primer

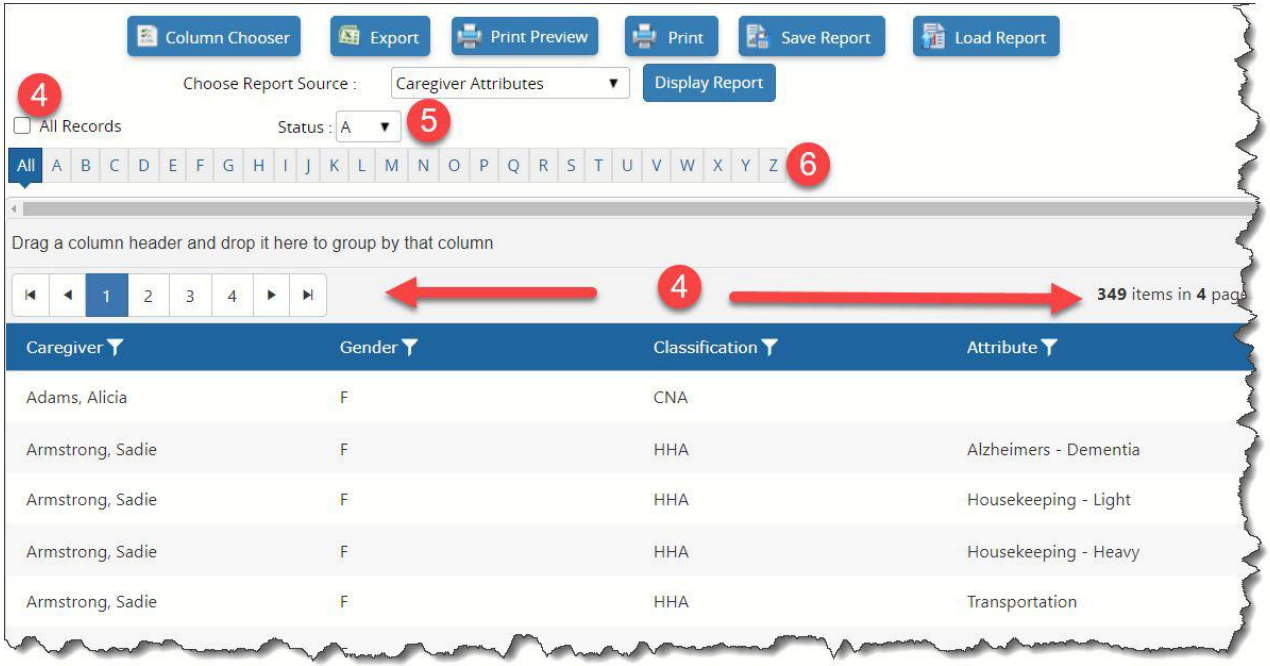
Creating a Report in Report Writer, cont'd.

4. 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.

5. 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).

6. 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….

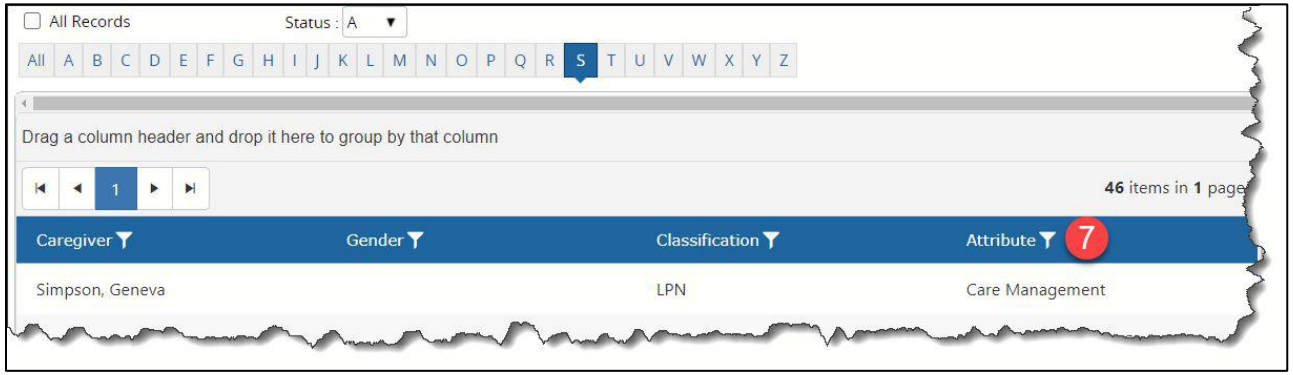


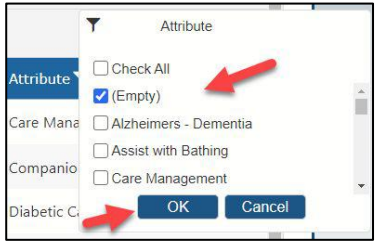
Report Writer - a Step-by-Step Primer

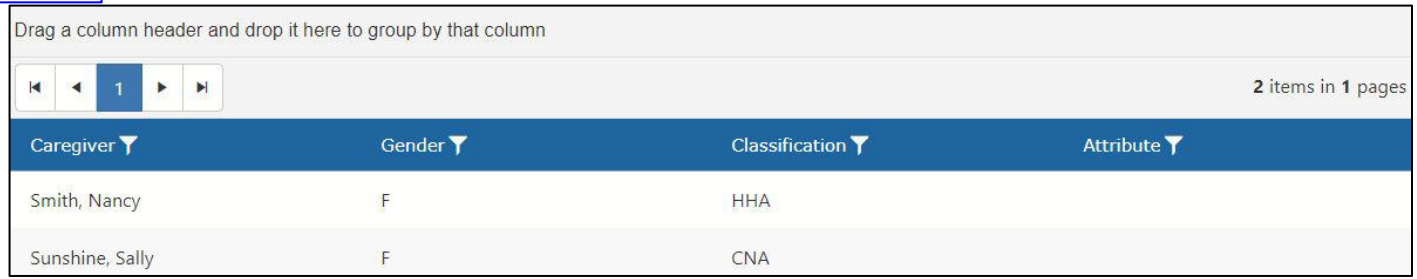
Creating a Report in Report Writer, cont'd.

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.)

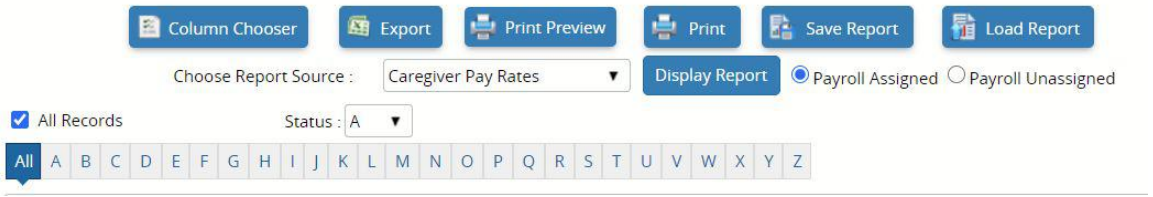
You can also sort and group the data - let's take a look at that next.





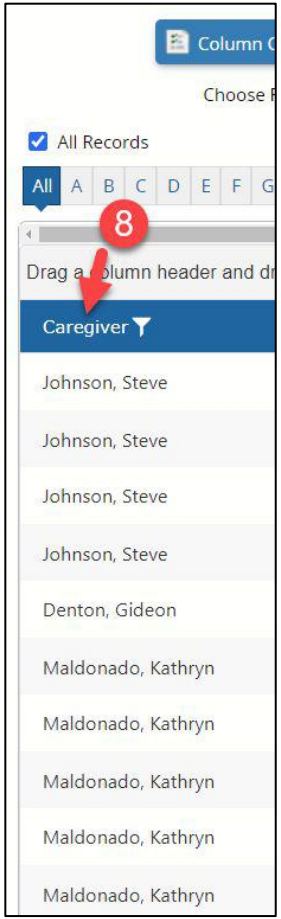


Report Writer - a Step-by-Step Primer



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…)

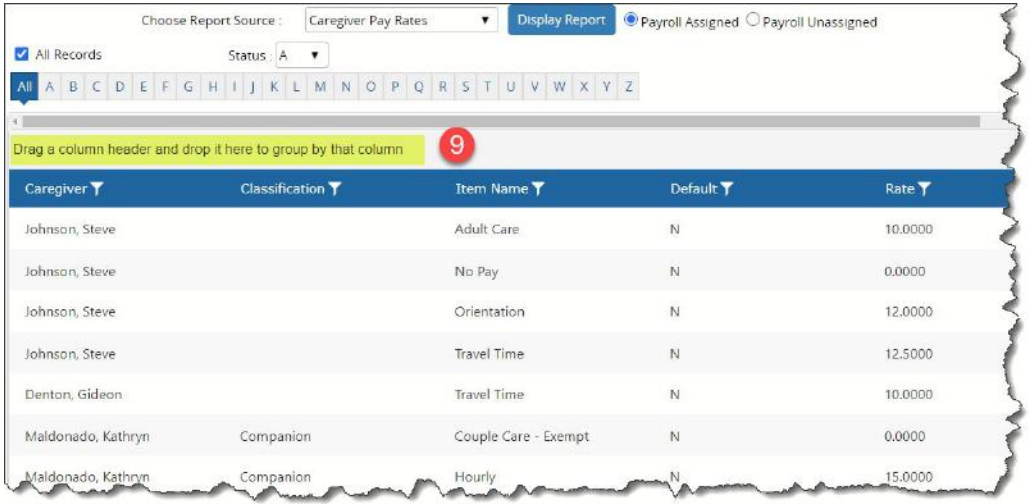


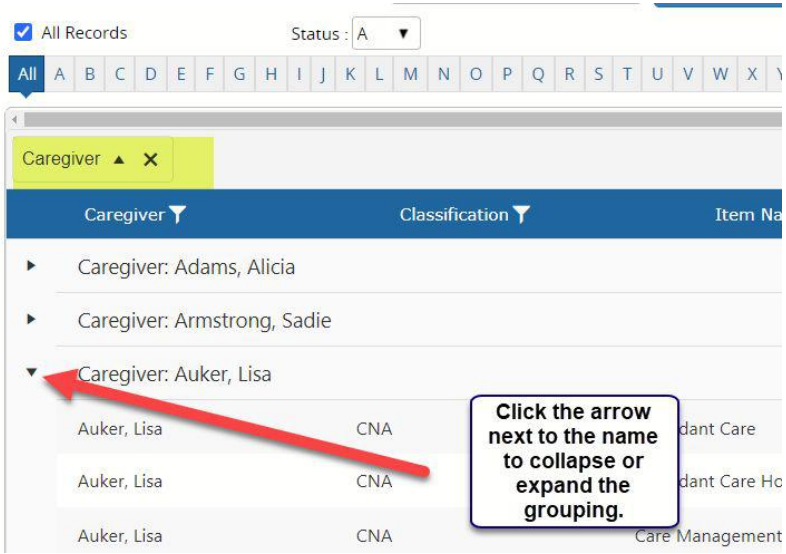
Report Writer - a Step-by-Step Primer

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.

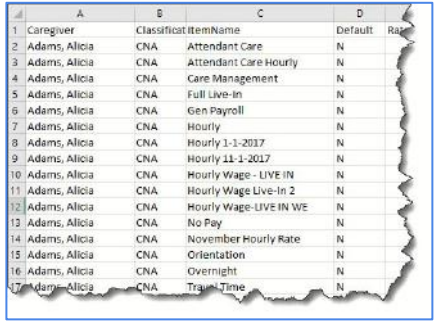




Report Writer - a Step-by-Step Primer

Export to XLS

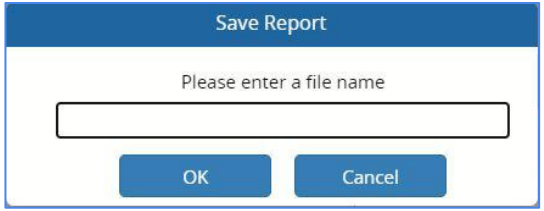
this will export the current page out to Excel. Note: You are not able to export to Excel any data that includes grouping, so be sure to 'un-group' any data prior to exporting to XLS. (You CAN export filtered & sorted data.)



	A	B	C	D	
1	Caregiver	Classificat	ItemName	Default	Ra
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...



Print Preview/Print

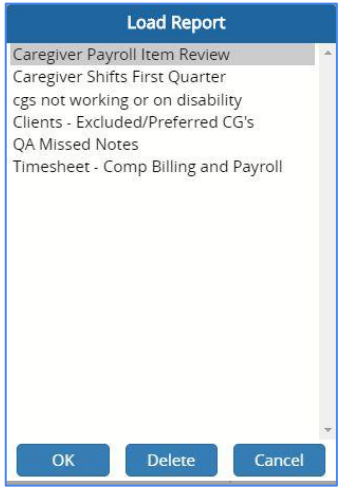
You can print the data you have grouped, filtered, & sorted. You may wish to do a Print Preview first to see how it will look. (It will have your company name & logo at the top if you have that set up in Company Settings.)

The GenSuccess Agency

Caregiver	Classification	Item Name	D
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
Adam	CNA	Hourly Wage Live-In 2	

Load Report

… and load it up again later!



More Resources

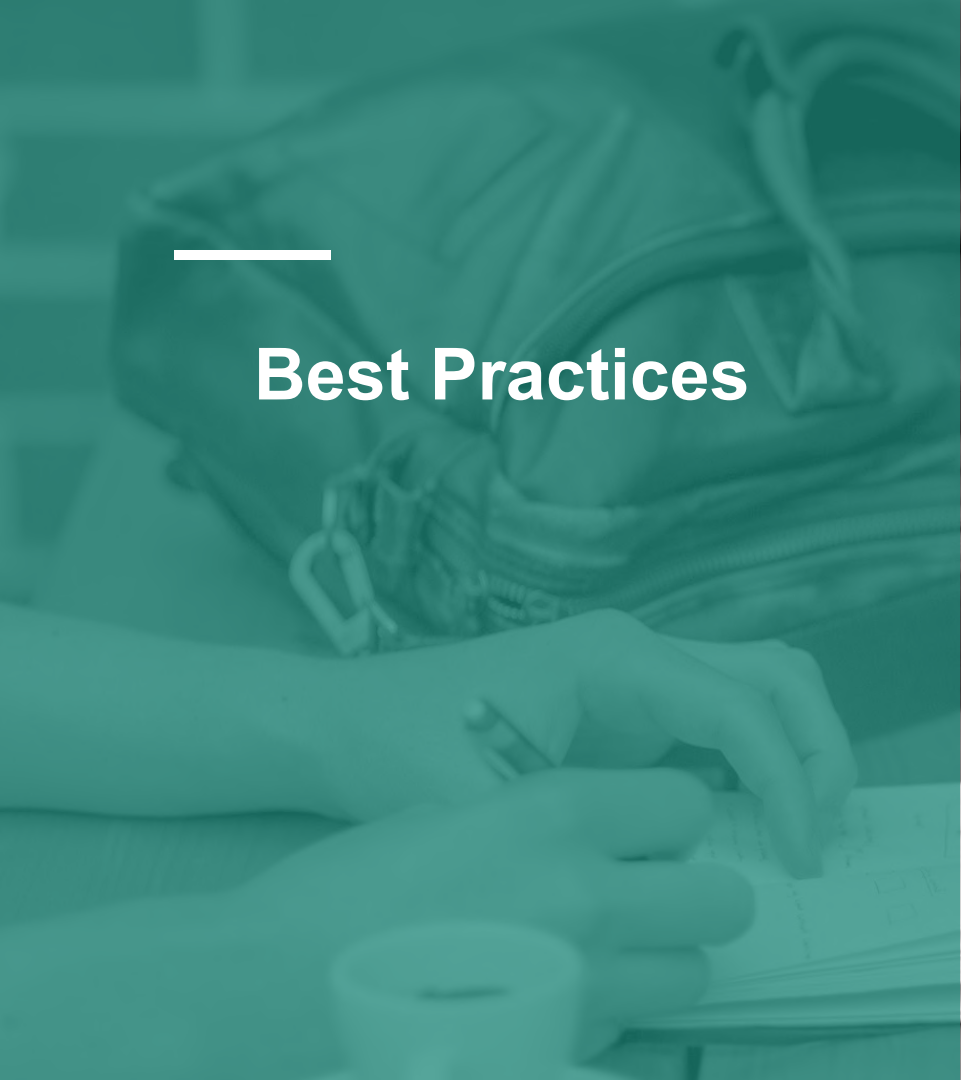
Additional Information on Reports in Generations can be found in the User Documentation...

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

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

Category Filter: Reporting

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



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.

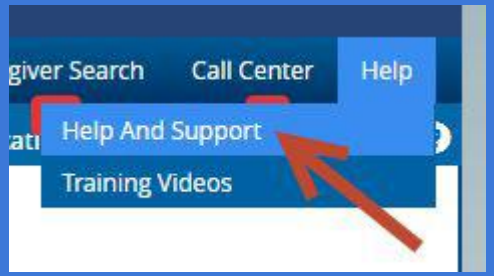
Remember... G.I.G.O. Accuracy & consistency in data entry counts!

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 OR www.homecaresoftware.com
- Email: support@idb-sys.com
- Phone: 989-546-4512

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

GENERATIONS
Homecare System

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