



# HomeTrak

Your expert companions in home care software

## HOMETRAK COMPANION

DASHBOARDS

VERSION 6.3

# Table of Contents

## [CRM Process](#)

### [Sales/Marketing](#)

[Status Added by Referral Source \(h0005\)](#)

[Quick Snapshot \(h0015\)](#)

## [Client/Caregiver Dashboards](#)

### [Statuses \(Under Construction\)](#)

[Average Days in Status \(i0001\)](#)

[Status Flow Summary \(i0002\)](#)

### [Summary by Category](#)

[Home Health/Evaluation \(i0006\)](#)

### [Summary by Type](#)

[Skills \(i0005\)](#)

[Characteristics \(i0004\)](#)

## [Scheduling Dashboards](#)

### [Schedulers](#)

[Schedule Overview \(h0001\)](#)

[Schedules - Summary \(h0002\)](#)

[No Caregiver \(Open Schedules\) - \(h0012\)](#)

[Cancelled Schedules \(h0011\)](#)

[Schedule Count and Hours by Call Type \(h0016\)](#)

[Schedules – Day of Week and Times \(h0003\)](#)

[Documented Events - Summary by Category \(h0009\)](#)

[Documented Events - By Time and DOW \(Day of the Week\) - \(h0014\)](#)

[Documented Events Summary by Category \(i0003\)](#)

[Required Dates Expired by Person \(i0007\)](#)

## Scheduling Data Grid Dashboards

[Summary by Day \(d0001\)](#)

[Summary by Day of the Week \(d0002\)](#)

[Summary by Month \(d0003\)](#)

[Summary of Finalized Hours \(d0004\)](#)

[Summary of Hours \(d0005\)](#)

## Management Dashboards

### Owner/Management

[Billing Versus Payroll \(????\)](#)

[Payroll and Billing Summary \(h0006\)](#)

[Billing Summary \(h0017\)](#)

[Payroll Summary \(h0018\)](#)

[Payroll and Billing - Scatter Chart \(h0007\)](#)

[First and Last Day Scheduled \(h0004\)](#)

[Status Added by Referral Source \(h0005\)](#)

[Benchmark \(h0008\)](#)

[Achievements \(h0013\)](#)

### Billing Data Grid Dashboards

[Billing Summary \(e0001\)](#)

[Summary by Month By Client \(e0003\)](#)

[Summary By Month By Payer \(e0004\)](#)

[Billing By Rate \(e0005\)](#)

[Billing Scatter Chart \(e0002\)](#)

### Payroll Data Grid Dashboards

[Payroll Summary \(f0001\)](#)

[Summary by Month \(f0002\)](#)


[Payroll by Rates \(f0003\)](#)

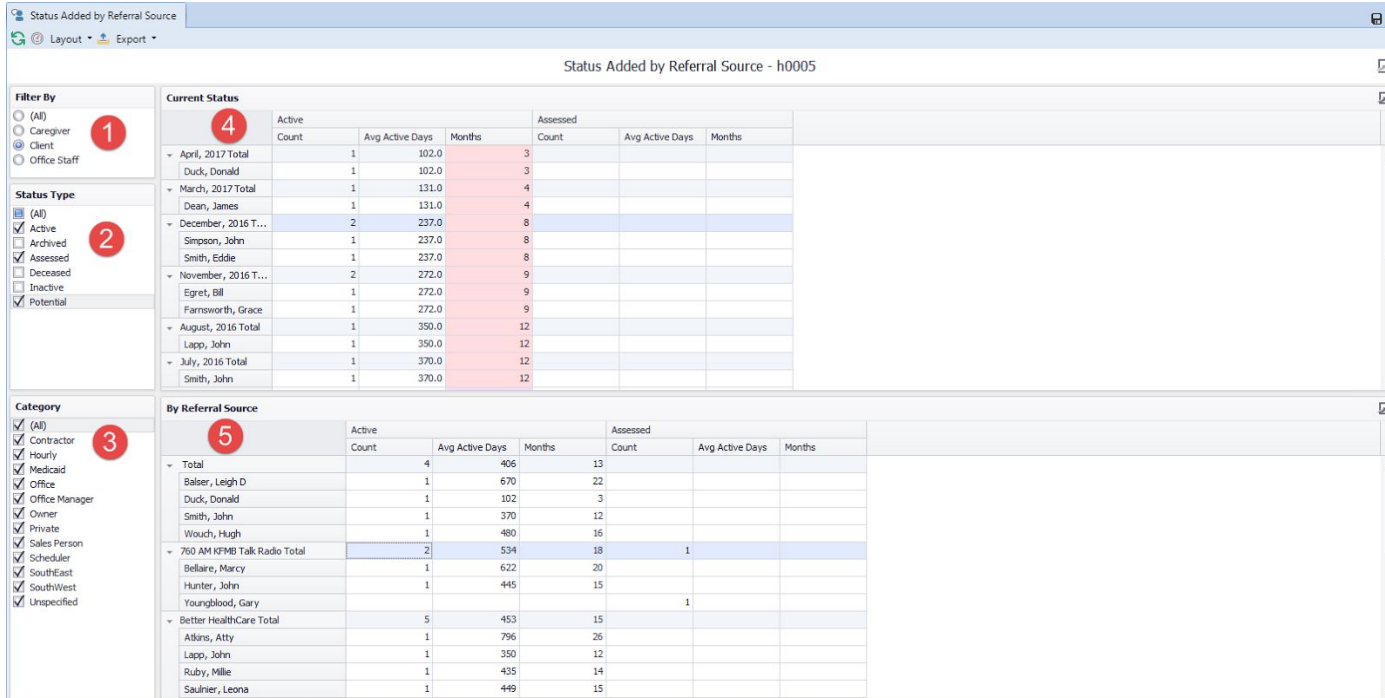
[Days Worked By Caregiver \(f0004\)](#)

# CRM Process

## Sales/Marketing

### Status Added by Referral Source (h0005)

Load dashboard from under 'Home' . 



**Filter By**

- (All)
- Caregiver
- Client
- Office Staff

**Status Type**

- (All)
- Active
- Archived
- Assessed
- Deceased
- Inactive
- Potential

**Category**

- (All)
- Contractor
- Hourly
- Medicaid
- Office
- Office Manager
- Owner
- Private
- Sales Person
- Scheduler
- SouthEast
- SouthWest
- Unspecified

**Current Status**


	Active			Assessed		
	Count	Avg Active Days	Months	Count	Avg Active Days	Months
April, 2017 Total	1	102.0	3			
Duck, Donald	1	102.0	3			
March, 2017 Total	1	131.0	4			
Dean, James	1	131.0	4			
December, 2016 Total	2	237.0	8			
Simpson, John	1	237.0	8			
Smith, Eddie	1	237.0	8			
November, 2016 Total	2	272.0	9			
Egret, Bill	1	272.0	9			
Farnsworth, Grace	1	272.0	9			
August, 2016 Total	1	350.0	12			
Lapp, John	1	350.0	12			
July, 2016 Total	1	370.0	12			
Smith, John	1	370.0	12			

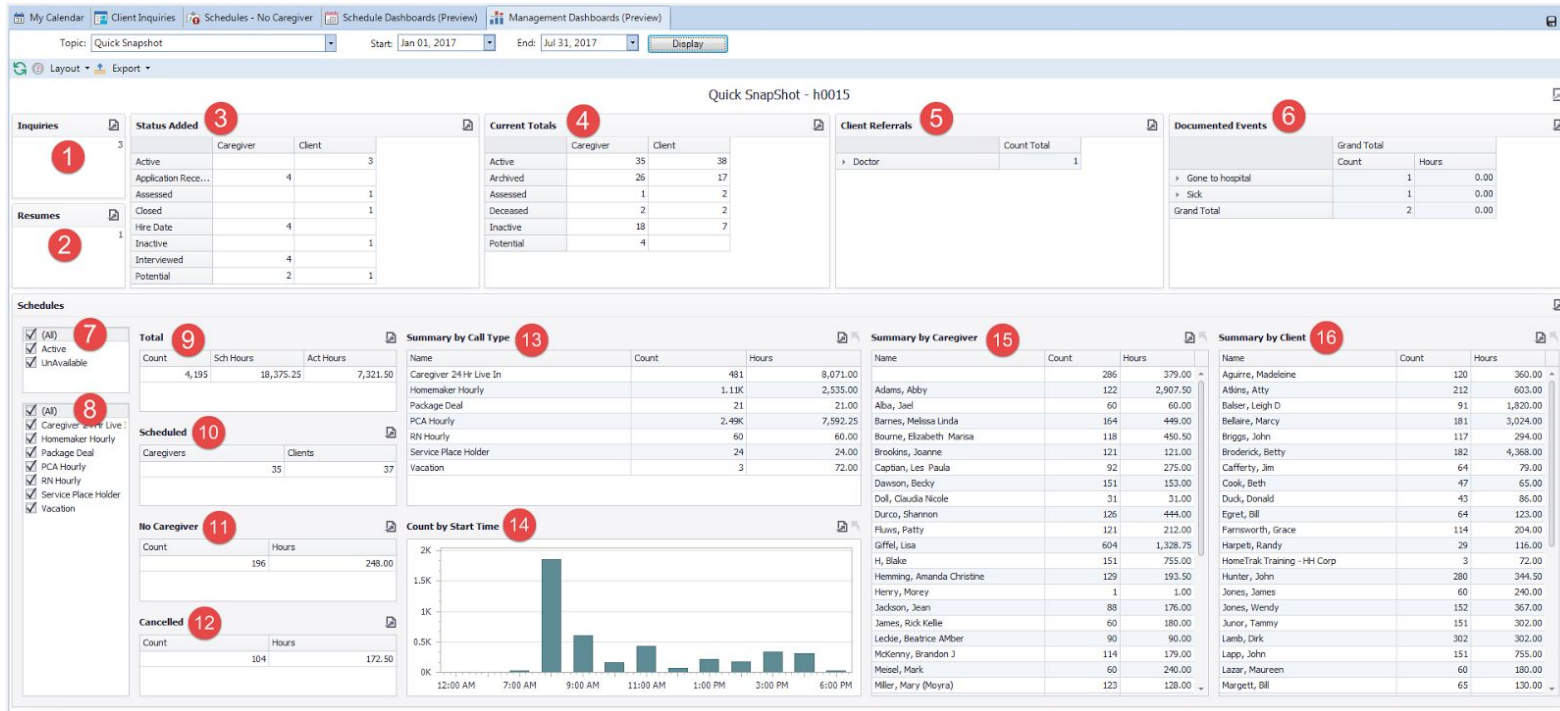
**By Referral Source**

	Active			Assessed		
	Count	Avg Active Days	Months	Count	Avg Active Days	Months
Total	4	406	13			
Balser, Leigh D	1	670	22			
Duck, Donald	1	102	3			
Smith, John	1	370	12			
Wouch, Hugh	1	480	16			
760 AM KFMB Talk Radio Total	2	534	18	1		
Bellaire, Mercy	1	622	20			
Hunter, John	1	445	15			
Youngblood, Gary				1		
Better HealthCare Total	5	453	15			
ASims, Atty	1	796	26			
Lapp, John	1	350	12			
Ruby, Mille	1	435	14			
Saulnier, Leona	1	449	15			

Section	Explanation
1. Filter By:	Client
2. Status Type:	Set status type to Potential, Assessed, Active or Archived
3. Current Status:	<p>This section will display the following:                      Client are display by their current status within the Month/Year.                      Explain the month to see the clients</p> <ul style="list-style-type: none"> <li>Number of clients within each status</li> <li>Average Days Active</li> <li>Number of Months Active</li> </ul>
4. By Referral Source	<p>This section will display the following:                      Organizations are display by the Client's current status                      Explain the Organization to see the clients</p> <ul style="list-style-type: none"> <li>Number of Active Clients by Referral Source (Organization)</li> <li>Average Days Active</li> <li>Number of Months Active</li> </ul>

# Quick Snapshot (h0015)

Load dashboard from under 'Home' . 



Section	Explanation
1. Inquiries	Total number of Client Inquires for the date range.
2. Resumes	Total number of Caregiver Resumes for the date range.
3. Status Added	Number of Caregivers and Client added to each status for the date range.
4. Current Totals	Number of Caregivers and Clients in each status for the date range.
5. Client Referral	Number of Clients by Organization Category by Organization.
6. Documented Events	Number of Documented Events and Hours by Category by Caregiver or Client
<b>Schedule Section – bottom portion of dashboard</b>	
7. Call Type Status	Can Filter by Status Active or Unavailable
8. Call Type	Can filter by Call Type
9. Total	Total Scheduled Hours for the date range.
10. Scheduled	Total number of Caregivers and Clients scheduled for the date range.
11. No Caregiver	Total number of schedules and hours with no caregiver for the date range.
12. Cancelled	Total number of schedules and hours cancelled for the date range.
13. Summary by call Type	Total number of schedules and hours for each call type for the date range.
14. Count by Start Time	Total number of schedules by start time for the date range.
15. Summary by Caregiver	Total number of schedules and hours for each caregiver for the date range. Double click line item to drill down to see client.
16. Summary by Client	Total number of schedules and hours for each client for the date range. Double click line item to drill down to see caregiver.

# Client/Caregiver Dashboards

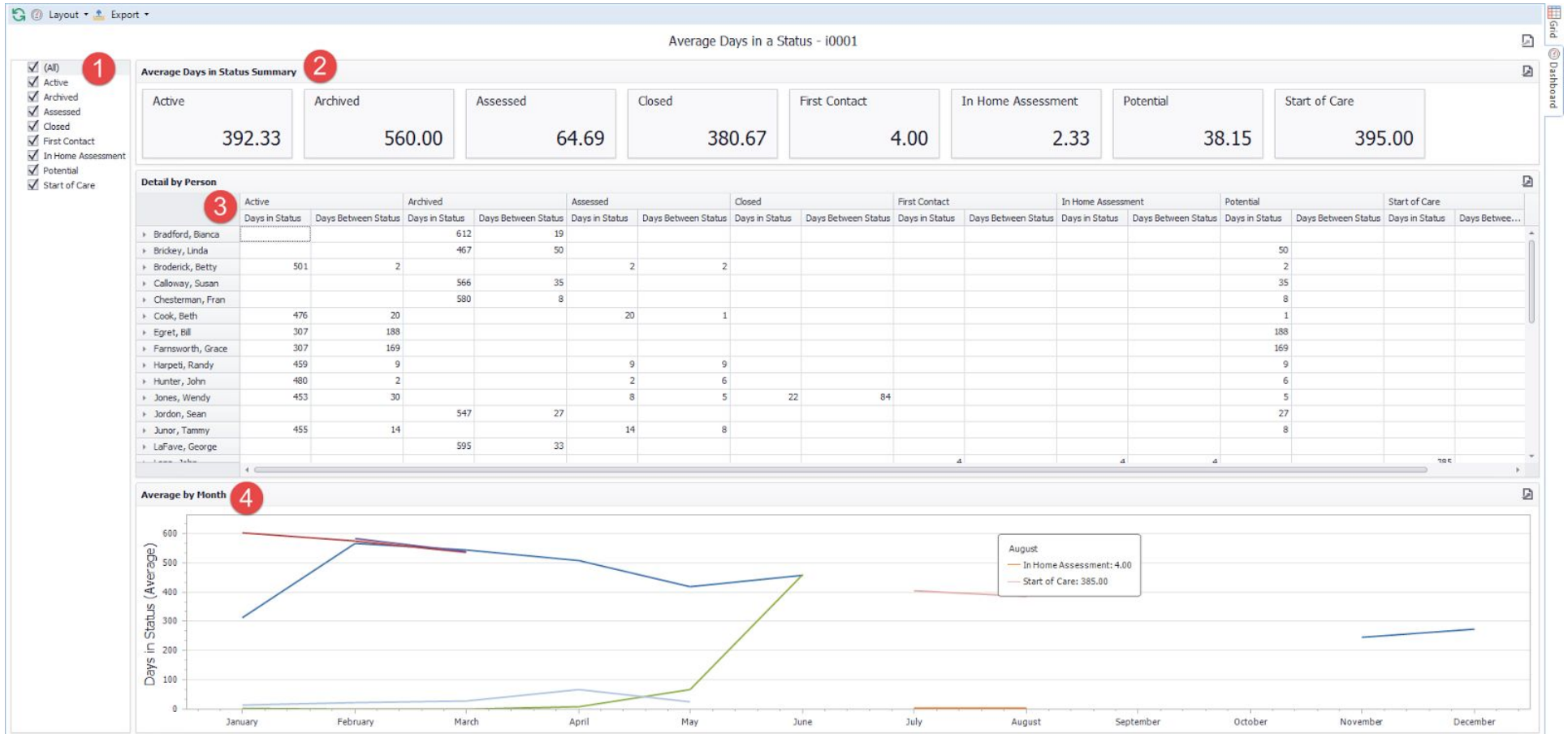
## Statuses

### Average Days in Status (i0001)

Load from Reports > Clients > Demographics > Status (Excel Style Reporting)

Load from Reports > Caregivers > Demographics > Status (Excel Style Reporting)

Can also be run for Office Staff and Organizations.

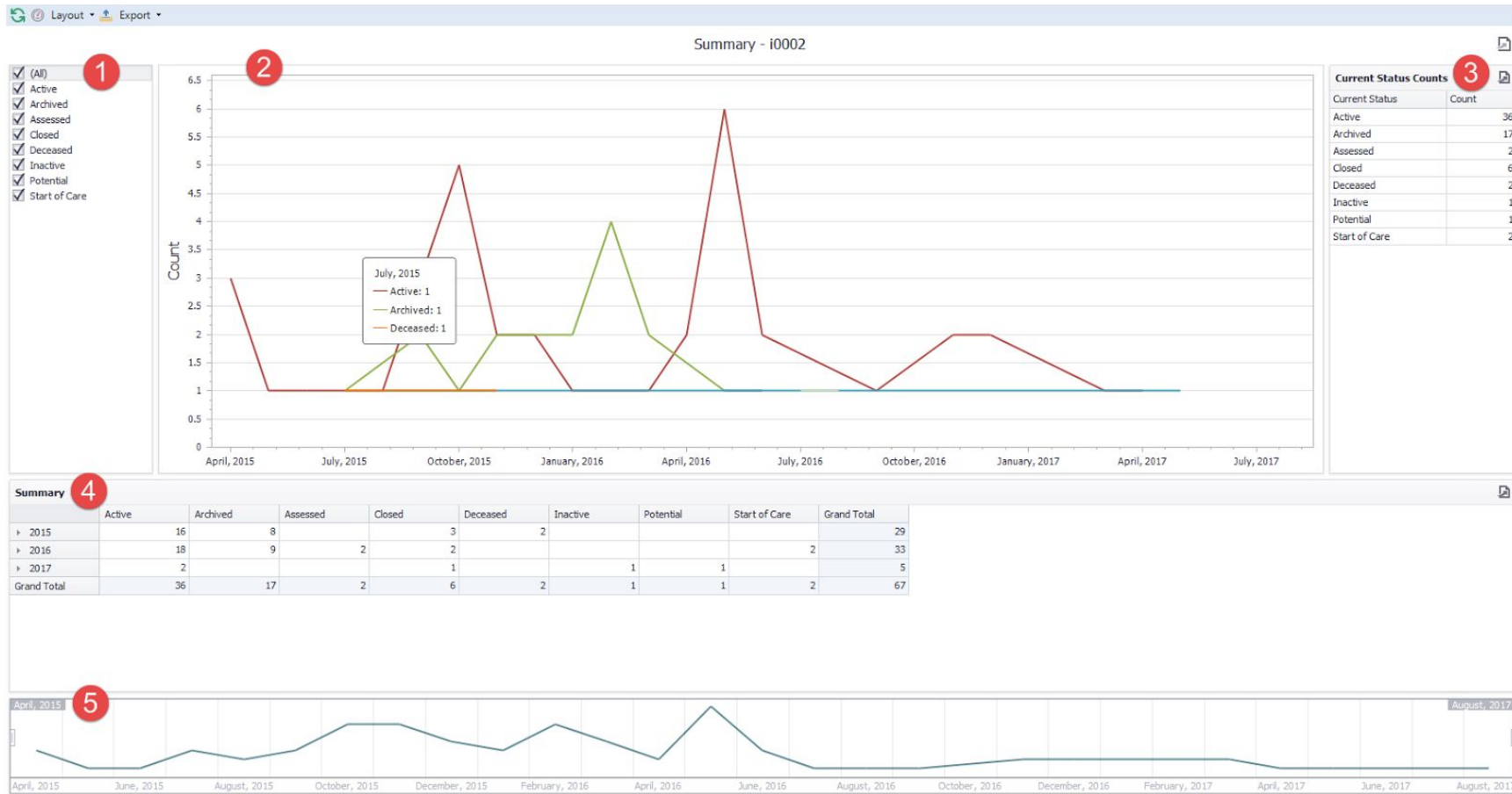


Section	Explanation
1. Status Type Filter	Filter by Status Type (All, Active, Archived, Assessed, Closed, Deceased, Inactive, Potential)
2. Average Days in Status Summary	Average number of days in each status type.
3. Detail by Person	Number of days in status and number of days between status
4. Average by Month	Graphical display of average number of days in a status.

# Status Flow Summary (i0002)

Load from Reports > Clients > Demographics > Status Flow (Excel Style Reporting)

Load from Reports > Caregivers > Demographics > Status Flow (Excel Style Reporting)



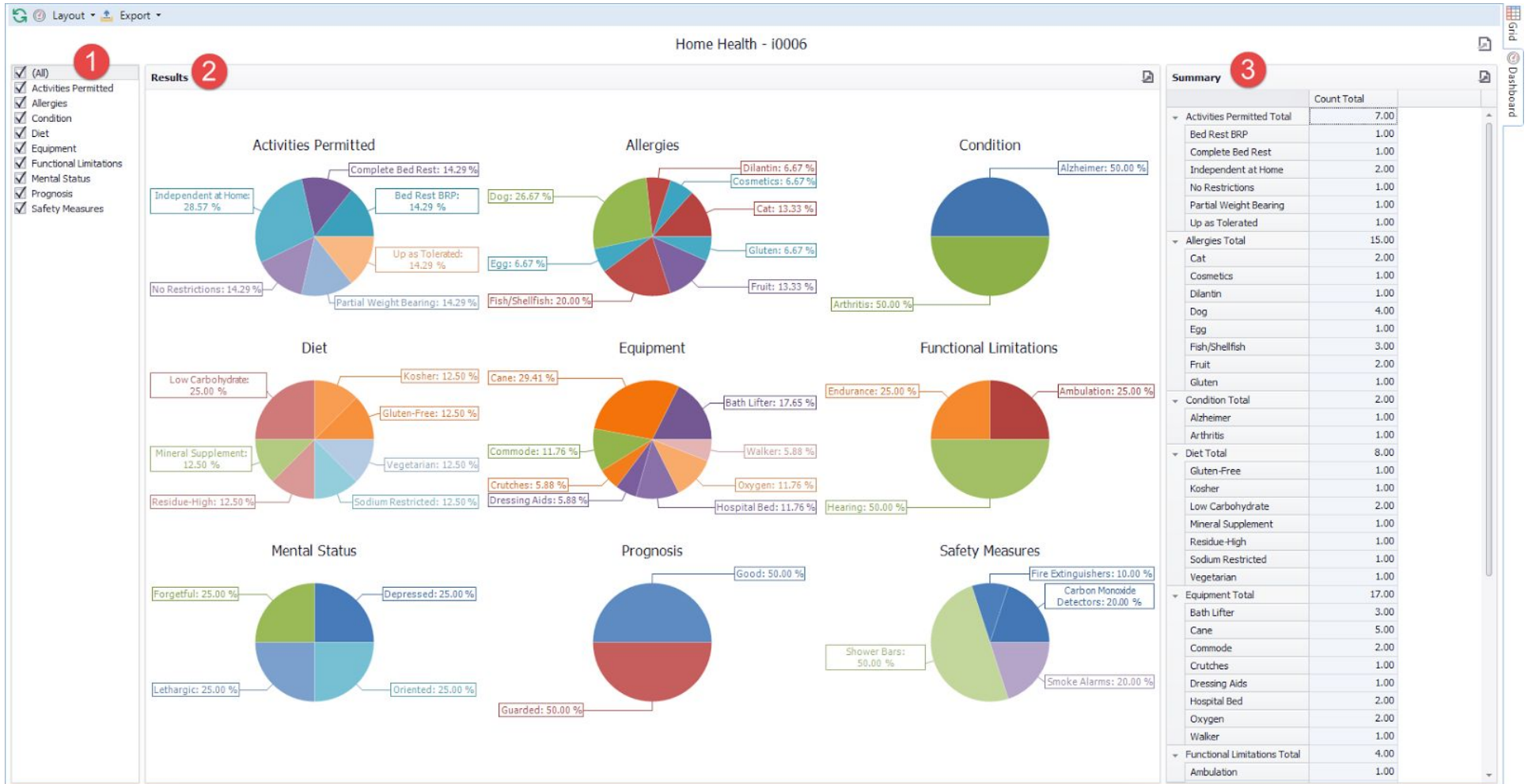
Section	Explanation
4. Status Type Filter	Filter by Status Type (All, Active, Archived, Assessed, Closed, Deceased, Inactive, Potential)
5. Graph	Graphical display of the results
6. Current Status Count	Total count for each Status Type
4. Summary	Summary of Status Types by Year
5. Graph by Month by Year	Graphical display by Month by Year



# Summary by Category

## Home Health/Evaluation (i0006)

Load from Reports > Clients > Care Plan > Home Health/Evaluation (Excel Style Reporting)



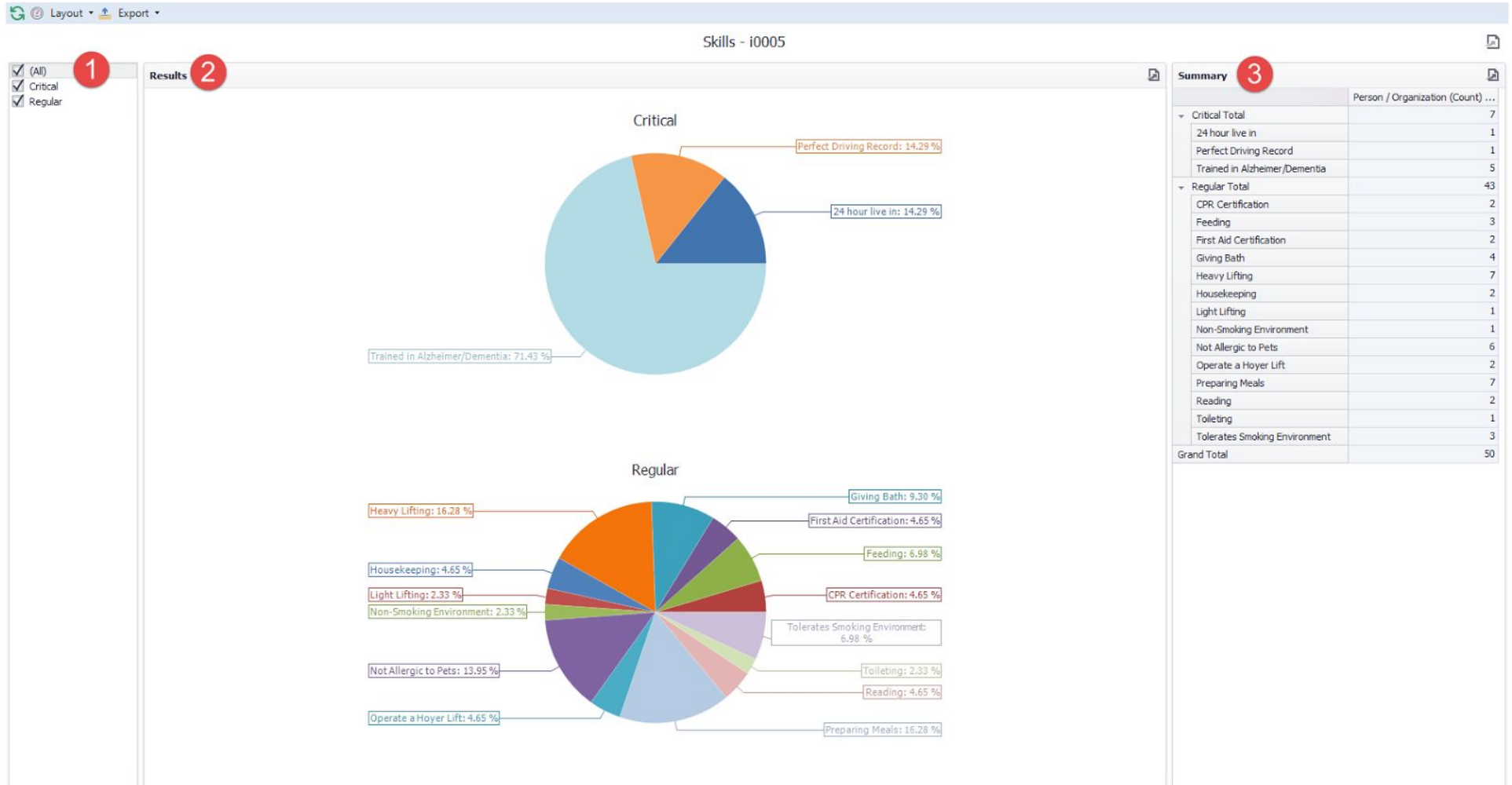
Section	Explanation
1. Home Health/Evaluation Category	Filter by Home Health/Evaluation Categories
2. Results	Results displayed in pie charts.
3. Summary	Total count for each Home Health/Evaluation Type

# Summary by Type

## Skills (i0005)

Load from *Reports > Clients > Care Plan > Skills* (Excel Style Reporting)

Load from *Reports > Caregivers > Scheduling Setup > Skills* (Excel Style Reporting)

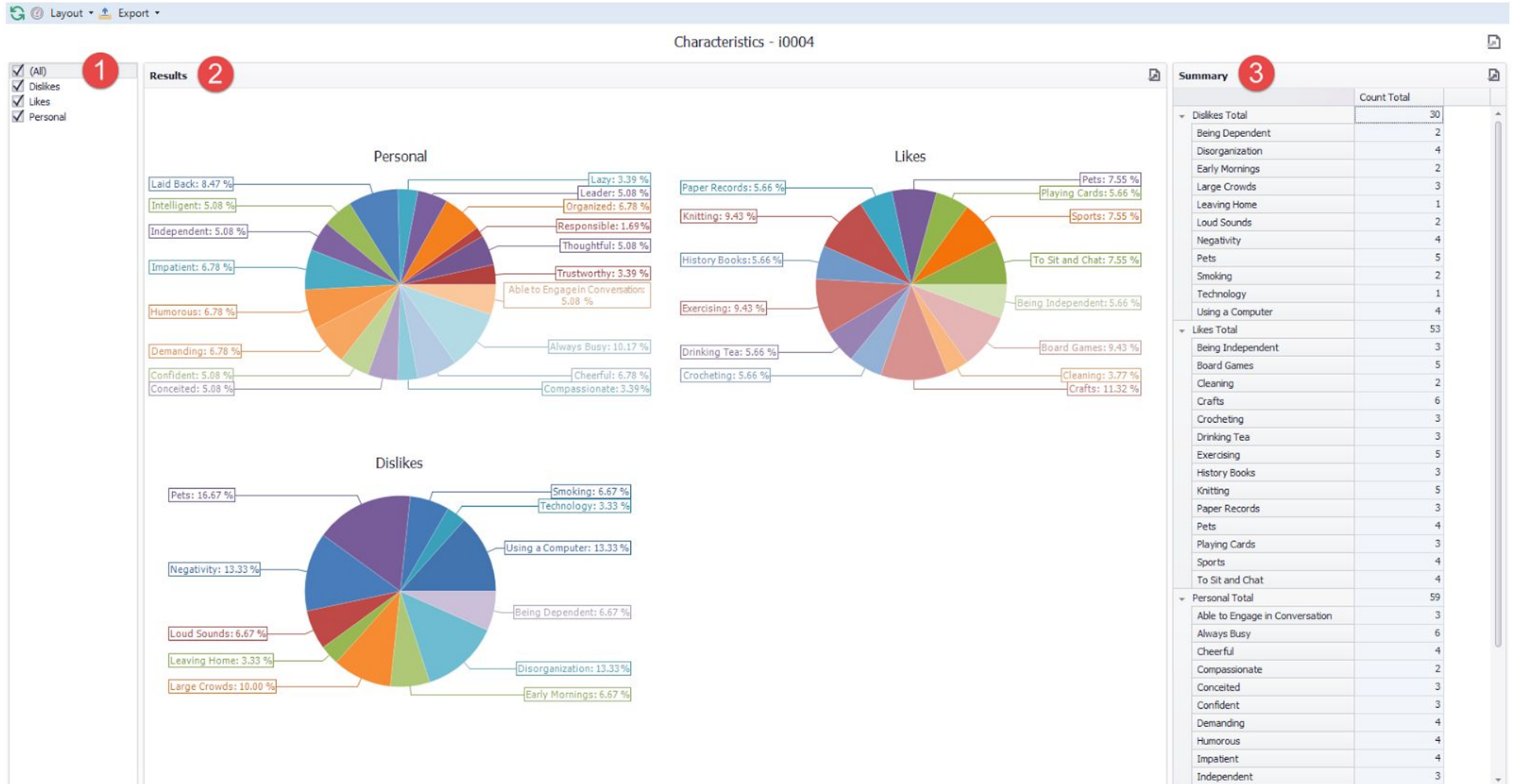


Section	Explanation
1. Skill Type Filter	Filter by Skill Type (All, Critical and/or Regular)
2. Results	Results displayed in pie charts.
3. Summary	Total count for each Skill Type

# Characteristics (i0004)

Load from *Reports > Clients > Care Plan > Characteristics* (Excel Style Reporting)

Load from *Reports > Caregivers > Demographics > Characteristics* (Excel Style Reporting)




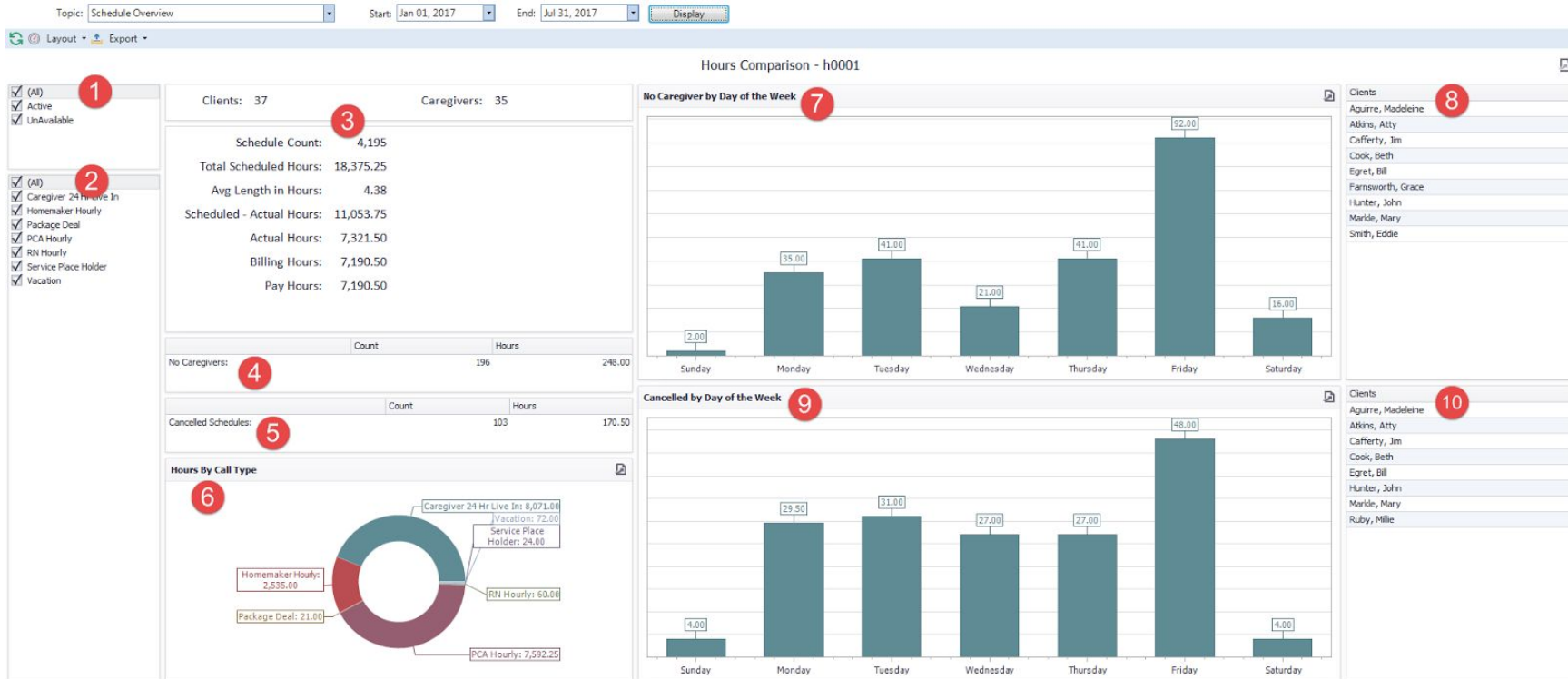
Section	Explanation
1. <b>Characteristic Type</b>	Filter by Characteristic Type (All, Dislikes, Likes and/or Personal)
2. <b>Results</b>	Results displayed in pie charts.
3. <b>Summary</b>	Total count for each Characteristic Type

# Scheduling Dashboards

## Schedulers


### Schedule Overview (h0001)

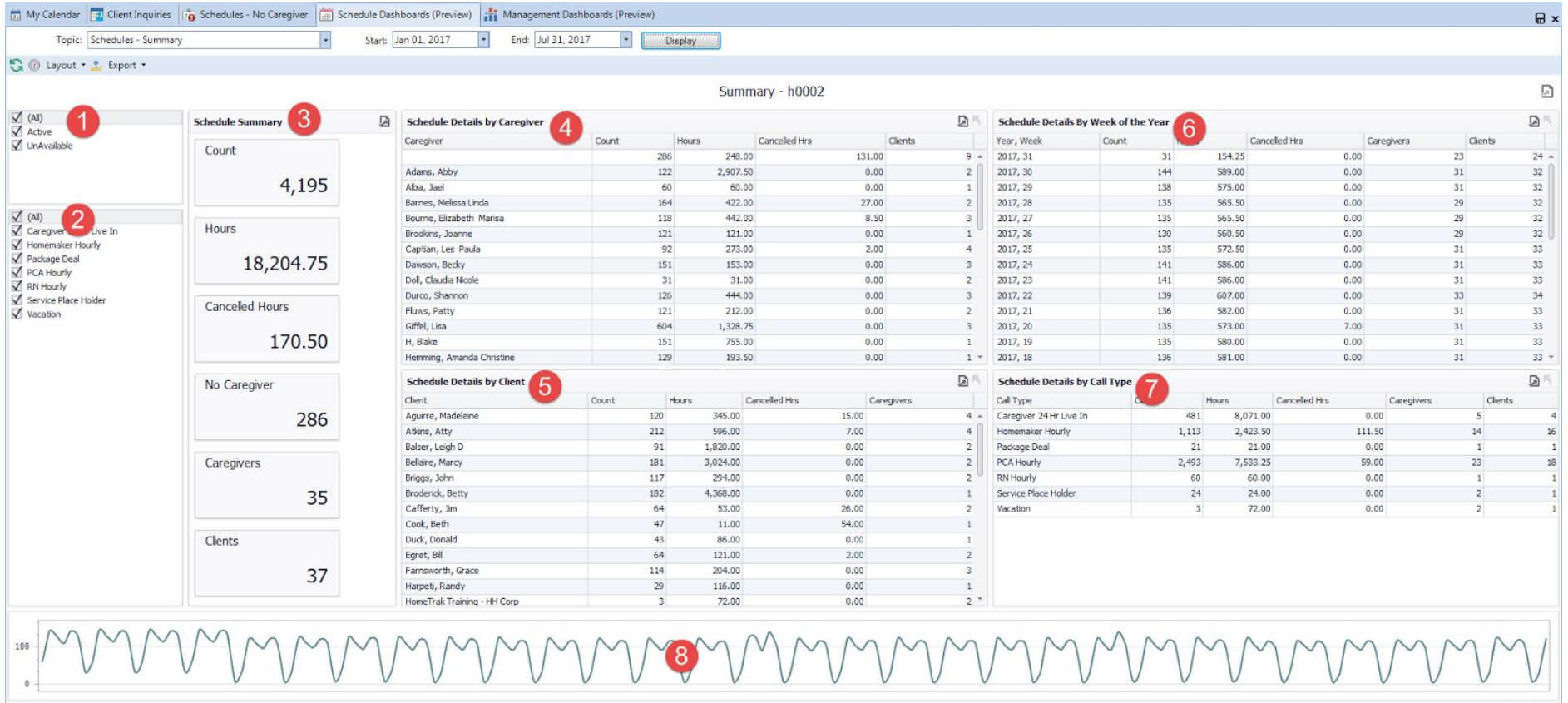
Load dashboard from under 'Home' . 



Section	Explanation
<b>1. Call Type Status</b>	Can filter by Call Type Status Active or Unavailable
<b>2. Call Type</b>	Can filter by Call Type
<b>3. Totals</b>	Total number of Clients, Caregivers, Schedules, Scheduled Hours, Scheduled-Actual Hours, Actual Hours, Billing Hours, Payroll Hours and the Average Length in Hours.
<b>4. No Caregivers</b>	Total number of schedules and hours with no caregiver.
<b>5. Cancelled Schedules</b>	Total number of schedules and hours cancelled.
<b>6. Hours By Call Types (graph)</b>	Visual display of the total number of hours by call type.
<b>7. No Caregivers by Day of the Week (graph)</b>	Visual display in graph format of the number of schedules with no caregiver by Day of the Week.
<b>8. Clients</b>	List of clients who have no caregiver schedules on the day of the week graph.
<b>9. Cancelled by Day of the Week (graph)</b>	Visual display in graph format of the number of schedules cancelled by Day of the Week.
<b>10. Clients</b>	List of clients who have cancelled schedules on the day of the week graph.


# Schedules - Summary (h0002)

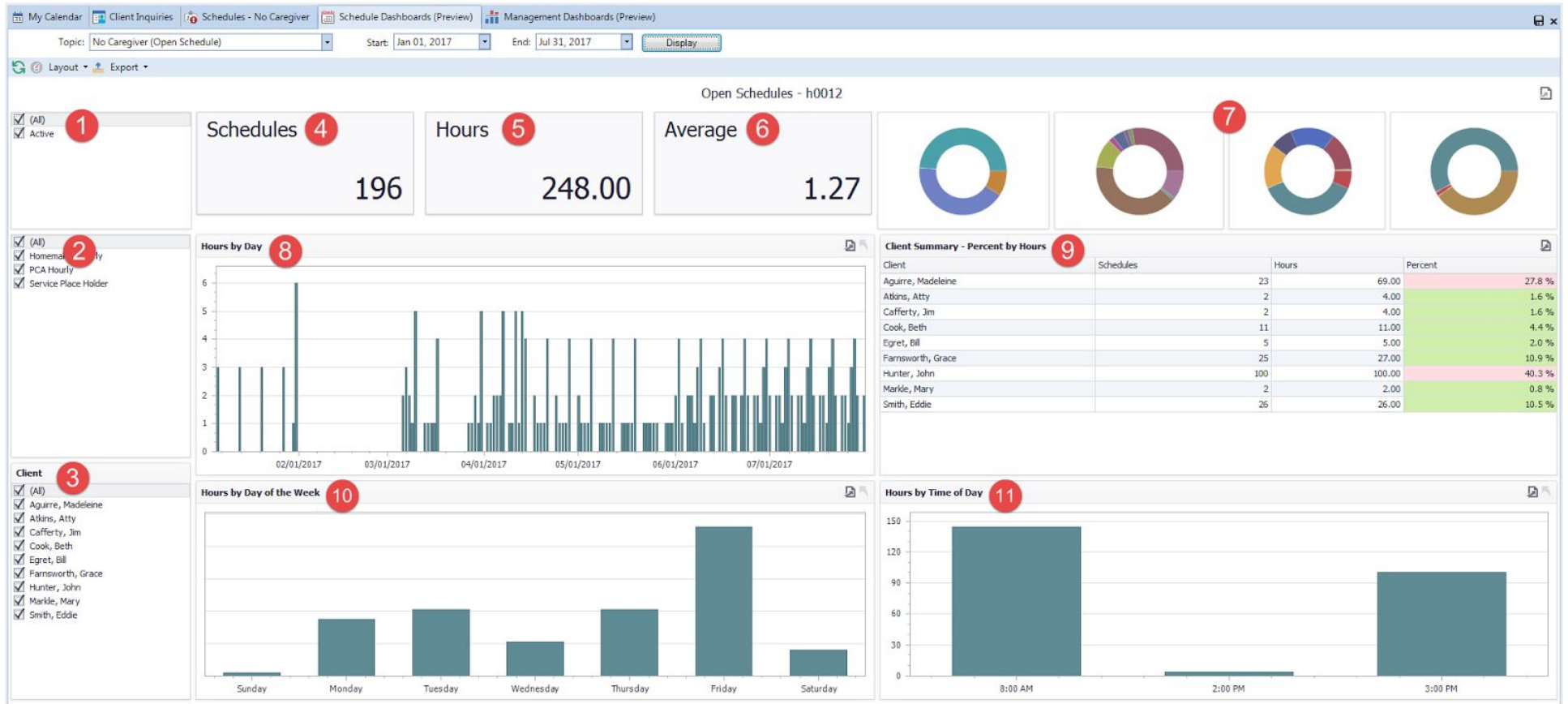
Load dashboard from under 'Home' . 



Section	Explanation
1. Call Type Status	Can filter by Call Type Status Active or Unavailable
2. Call Type	Can filter by Call Type
3. Schedule Summary	Total number of Schedules, Scheduled Hours, Cancelled Hours, Schedules with no Caregiver, Number of Caregivers, and Number of Clients
4. Schedule Details by Caregiver	Total number of schedules, hours, cancelled hours, and number of clients for each caregiver. Double click line item to drill down to see client names.
5. Schedule Details by Client	Total number of schedules, hours, cancelled hours, and number of caregivers for each client. Double click line item to drill down to see caregiver names.
6. Schedule Details by Week of the Year	Total number of schedules, hours, cancelled hours, number of caregivers and clients for the year and week. Double click line item to drill down to see clients names.
7. Schedule Details by Call Type	Total number of schedules, hours, cancelled hours, number of caregivers and clients for the call type. Double click line item to drill down to see clients names.
8. Graph	Visual display of the number of scheduled hours by day of the week.


# No Caregiver (Open Schedules) - (h0012)

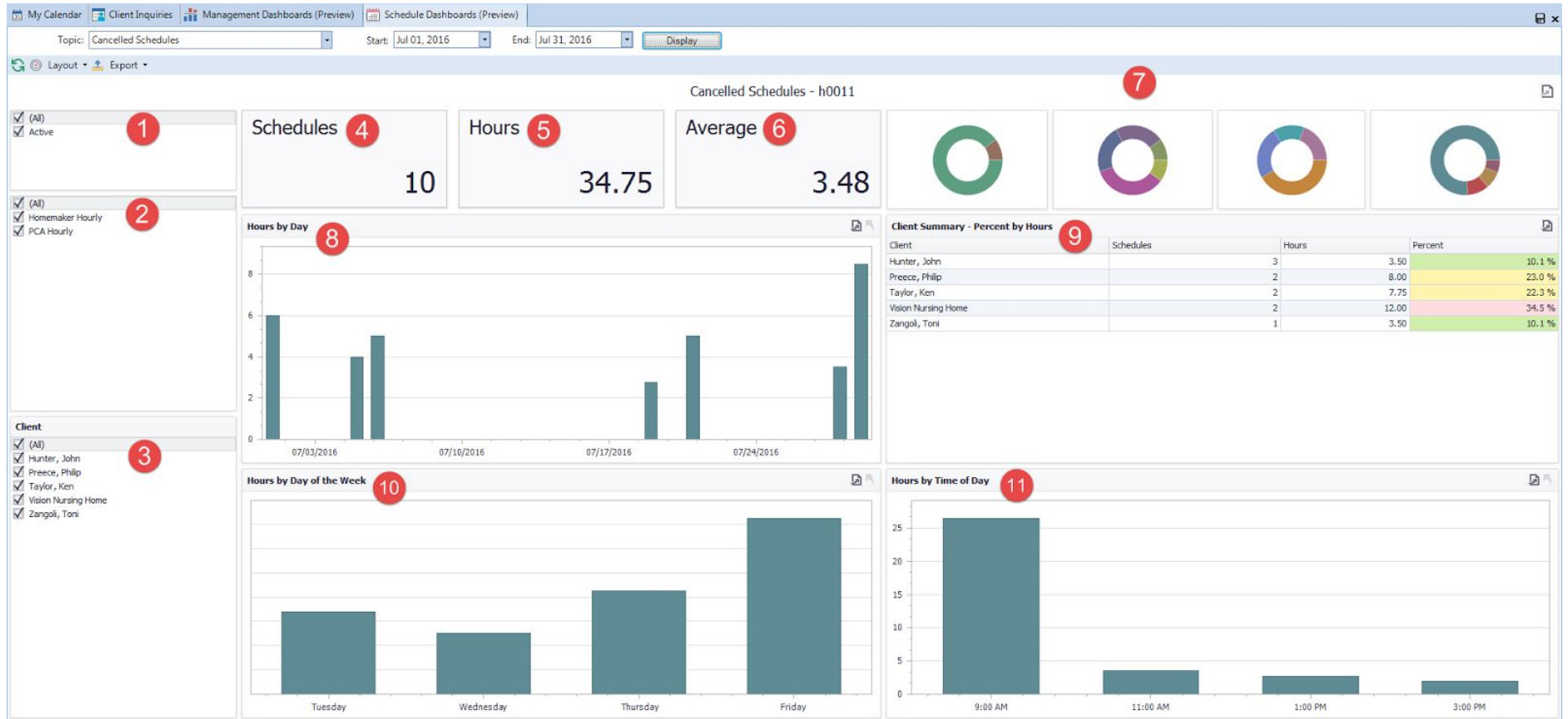
Load dashboard from under 'Home' . 



Section	Explanation
<b>1. Call Type Status</b>	Can filter by Call Type Status Active or Unavailable
<b>2. Call Type</b>	Can filter by Call Type
<b>3. Client</b>	Can filter by Client Name
<b>4. Schedules</b>	Total Number of Schedules for the date range.
<b>5. Hours</b>	Total Number of Scheduled Hours for the date range.
<b>6. Average</b>	Average Number of Scheduled Hours per Schedule (Hours / Schedules)
<b>7. Circle Graphs</b>	Four different graphs 1) Number of Schedules(Percentage) by Call Type 2) Number of Schedules(Percentage) by Client 3) Number of Schedules(Percentage) by Day 4) Number of Schedules(Percentage) by Start Time of Day
<b>8. Hours by Day (graph)</b>	Total Number of Scheduled Hours by Day
<b>9. Client Summary –Percent by Hours</b>	Total Number Schedules, Hours and Percentage by Client
<b>10. Hours by Day of the Week (graph)</b>	Total Number of Scheduled Hours by Day of the Week
<b>11. Hours by Time of Day (graph)</b>	Total Number of Scheduled Hours by Start Time of the Day


# Cancelled Schedules (h0011)

Load dashboard from under 'Home' . 



Section	Explanation
<b>1. Call Type Status</b>	Can filter by Call Type Status Active or Unavailable
<b>2. Call Type</b>	Can filter by Call Type
<b>3. Client</b>	Can filter by Client Name
<b>4. Schedules</b>	Total Number of Cancelled Schedules for the date range.
<b>5. Hours</b>	Total Number of Cancelled Scheduled Hours for the date range.
<b>6. Average</b>	Average Number of Cancelled Scheduled Hours per Schedule (Hours / Schedules)
<b>7. Circle Graphs</b>	Four different graphs 1) Number of Cancelled Schedules(Percentage) by Call Type 2) Number of Cancelled Schedules(Percentage) by Client 3) Number of Cancelled Schedules(Percentage) by Day 4) Number of Cancelled Schedules(Percentage) by Start Time of Day
<b>8. Hours by Day Graph</b>	Total Number of Cancelled Scheduled Hours by Day
<b>9. Client Summary –Percent by Hours</b>	Total Number Cancelled Schedules, Hours and Percentage by Client
<b>10. Hours by Day of the Week Graph</b>	Total Number of Cancelled Scheduled Hours by Day of the Week
<b>11. Hours by Time of Day Graph</b>	Total Number of Cancelled Scheduled Hours by Start Time of the Day

# Schedule Count and Hours by Call Type (h0016)

Load dashboard from under 'Home' . 

My Calendar | Client Inquiries | Management Dashboards (Preview) | Schedule Dashboards (Preview)

Topic: Schedules by Call Type Start: Jul 01, 2016 End: Jul 31, 2016 Display

Layout Export Click to switch Call Type Count to Hours

Count and Hours by Call Type - h0016

**1** Call Type - Count **3**

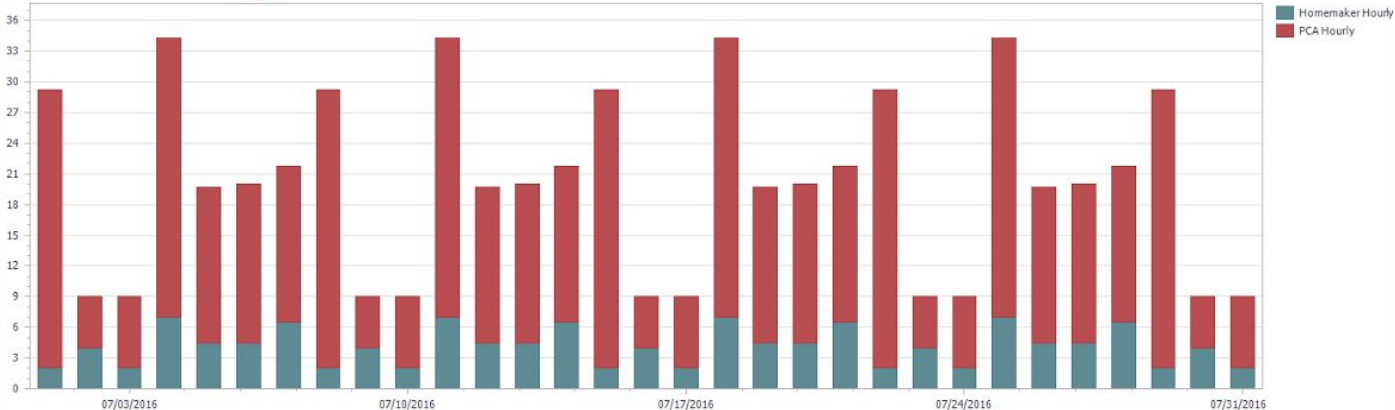
Homemaker Hourly  
**64**

PCA Hourly  
**223**

**2**

(All) Canceled Completely Posted

**4** Scheduled Hours By Selected Call Types




Legend: Homemaker Hourly (teal), PCA Hourly (red)

**5** By Call Type and Client

Call Type	Client	Count	Hours
Homemaker Hourly	Jones, James	14	28.00
Homemaker Hourly	Margett, Bill	13	26.00
Homemaker Hourly	McKenny, Francis	9	18.00
Homemaker Hourly	Zanders, Virginia	16	16.00
Homemaker Hourly	Zangoli, Toni	12	42.00
PCA Hourly	Hunter, John	42	52.50
PCA Hourly	Jones, Wendy	23	56.00
PCA Hourly	Lamb, Dirk	42	42.00
PCA Hourly	Mccall, Timothy	12	12.00
PCA Hourly	Preece, Philip	17	68.00
PCA Hourly	Soulie, Mary	31	62.00
PCA Hourly	Taylor, Ken	26	76.75


**6** By Call Type and Caregiver

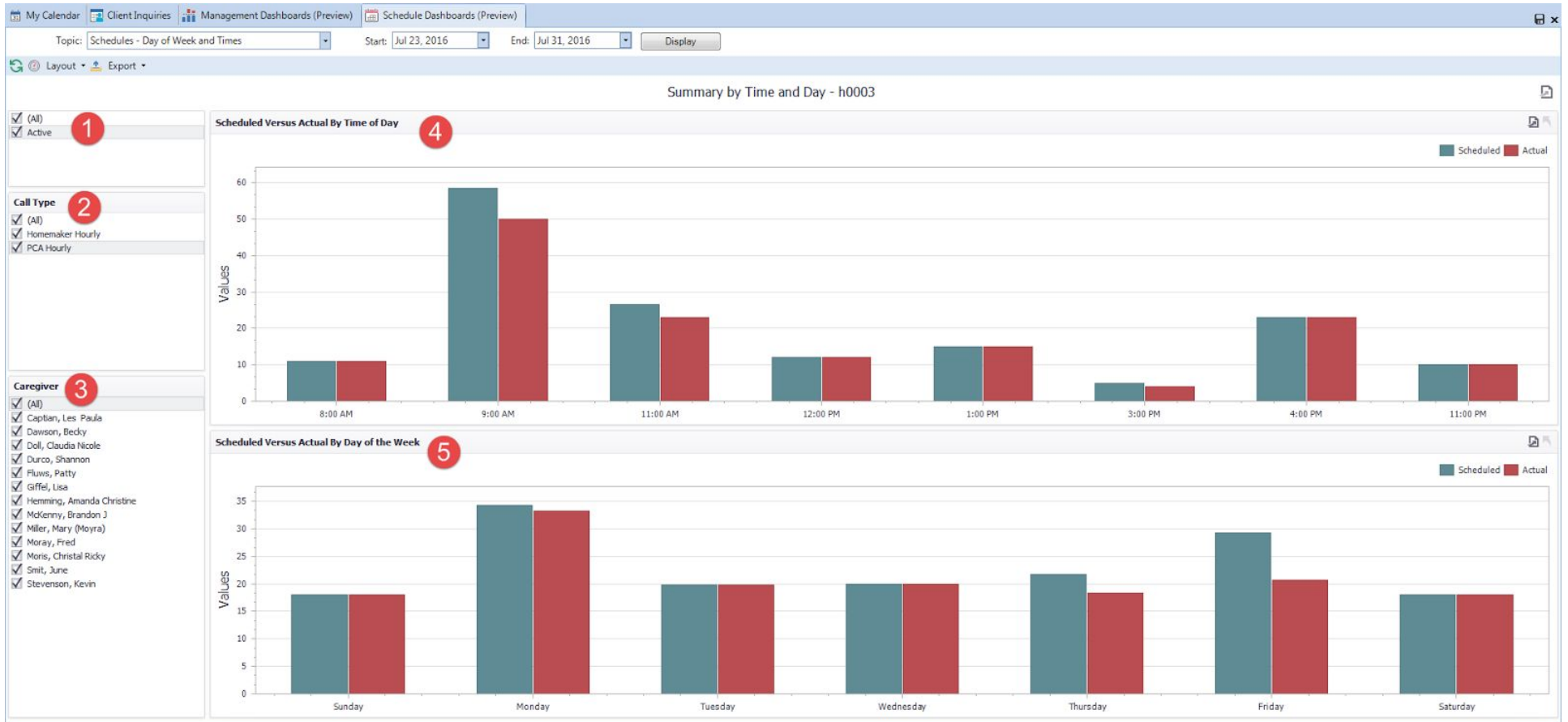
Call Type	Caregiver	Count	Hours
Homemaker Hourly	McKenny, Brandon J	13	26.00
Homemaker Hourly	Miller, Mary (Moyra)	16	16.00
Homemaker Hourly	Moray, Fred	12	42.00
Homemaker Hourly	Moris, Christal Ricky	14	28.00
Homemaker Hourly	Stevenson, Kevin	9	18.00
PCA Hourly	Captian, Les Paula	5	25.00
PCA Hourly	Dawson, Becky	20	20.00
PCA Hourly	Doll, Claudia Nicole	5	5.00
PCA Hourly	Durco, Shannon	40	95.00
PCA Hourly	Fluvs, Patty	17	30.00
PCA Hourly	Giffel, Lisa	85	186.75
PCA Hourly	Hemming, Amanda Christine	21	31.50

Section	Explanation
<b>1. Call Type Status</b>	Can filter by Call Type Status Active or Unavailable
<b>2. Schedule Status</b>	Can filter by Schedule Status
<b>3. Call Type - Count Call Type - Hours</b>	You have two options to view by Count or Hours. To switch to Hours click the  icon then click Hours. The Count option will give you the total number of schedules by call type. The Hours option will give you the total number of scheduled hours by call type.
<b>4. Scheduled Hours by Selected Call Types (graph)</b>	Visual display of Total Number of Scheduled Hours by Active and Unavailable Call Types.
<b>5. By Call Type and Client</b>	Total Number of schedules and scheduled hours by Call type by client
<b>6. By Call Type and Caregiver</b>	Total Number of schedules and scheduled hours by Call type by caregiver




# Schedules – Day of Week and Times (h0003)

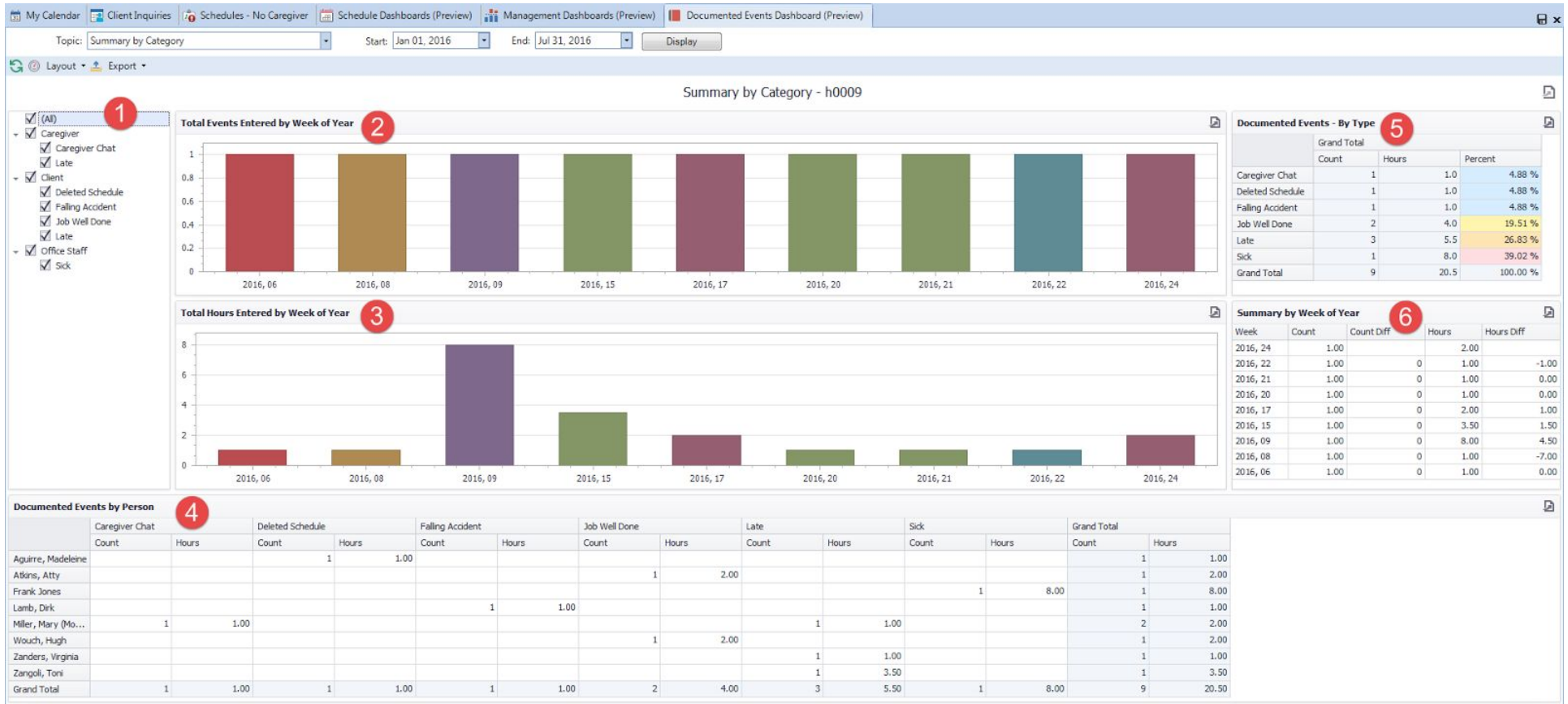
Load dashboard from under 'Home' . 



Section	Explanation
<b>1. Call Type Status</b>	Can filter by Call Type Status Active or Unavailable
<b>2. Call Type</b>	Can filter by Call Type
<b>3. Caregiver</b>	Can filter by Caregiver Name
<b>4. Scheduled Versus Actual by Time of Day</b>	Visual display showing Number of Scheduled Hours versus Schedule Actual Hours by Time of Day
<b>5. Scheduled Versus Actual by Day of Week</b>	Visual display showing Number of Scheduled Hours versus Schedule Actual Hours by Day of Week


# Documented Events - Summary by Category (h0009)

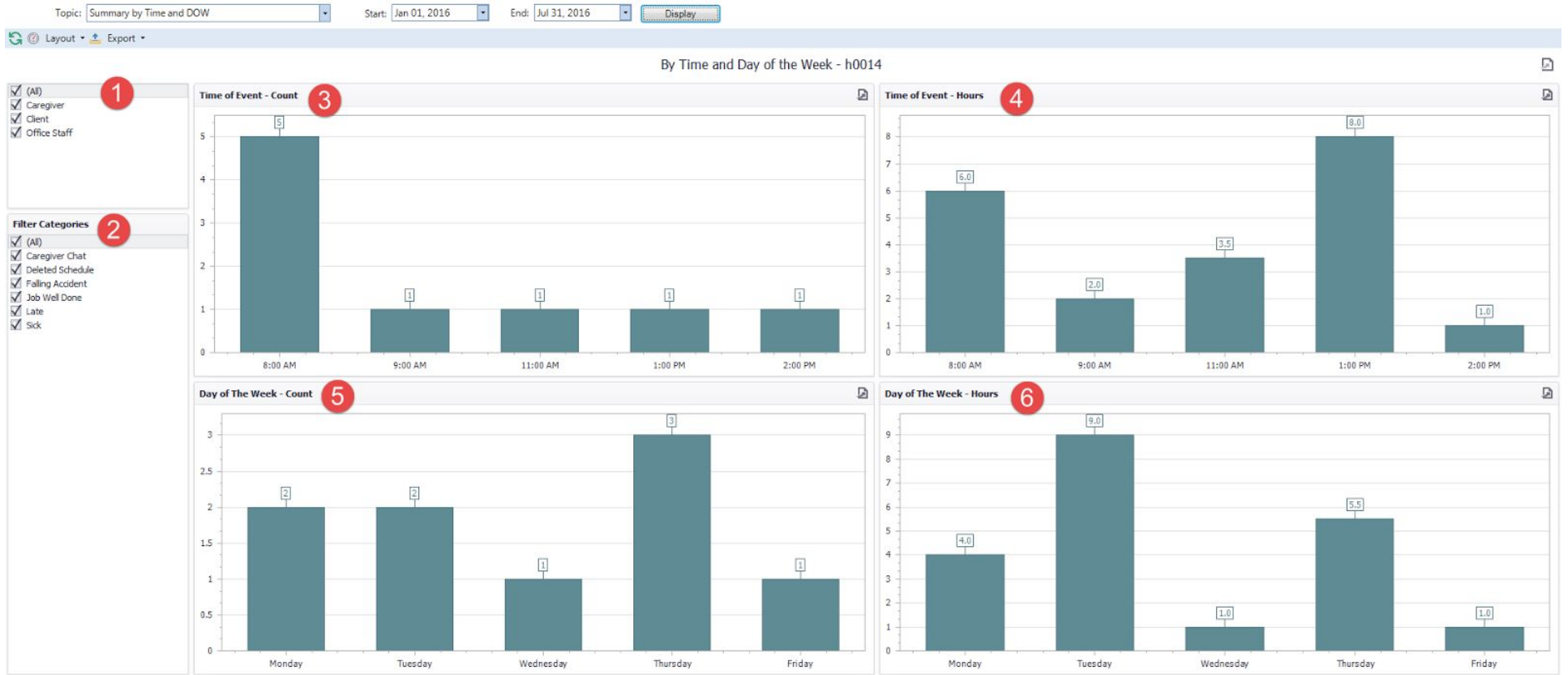
Load dashboard from under 'Home' . 



Section	Explanation
<b>1. Entity</b>	Can filter by Entity (All, Client, Caregiver, and Office Staff). Choose filter by Documented Event Categories
<b>2. Total Events Entered by Week of Year</b>	Visual display shows the Total Number of Documented Event Categories entered by Week of Year.
<b>3. Total Hours Entered by Week of Year</b>	Visual display shows the Total Number of Hours for each Documented Event category by Week of Year.
<b>4. Documented Events by Person</b>	Total Number of Documented Events and Hours in each Categories by Person.
<b>5. Documented Events – By Type</b>	Total Number of Events and Hours in each Documented Categories. Percentage breakdown by category.
<b>6. Summary by Week of Year</b>	Total Number of Events and Hours per Week of Year. Count Diff and Hours Diff are a comparison to the previous week to show if your totals are going up or down over time.

# Documented Events - By Time and DOW (Day of the Week) - (h0014)

Load dashboard from under 'Home' . 

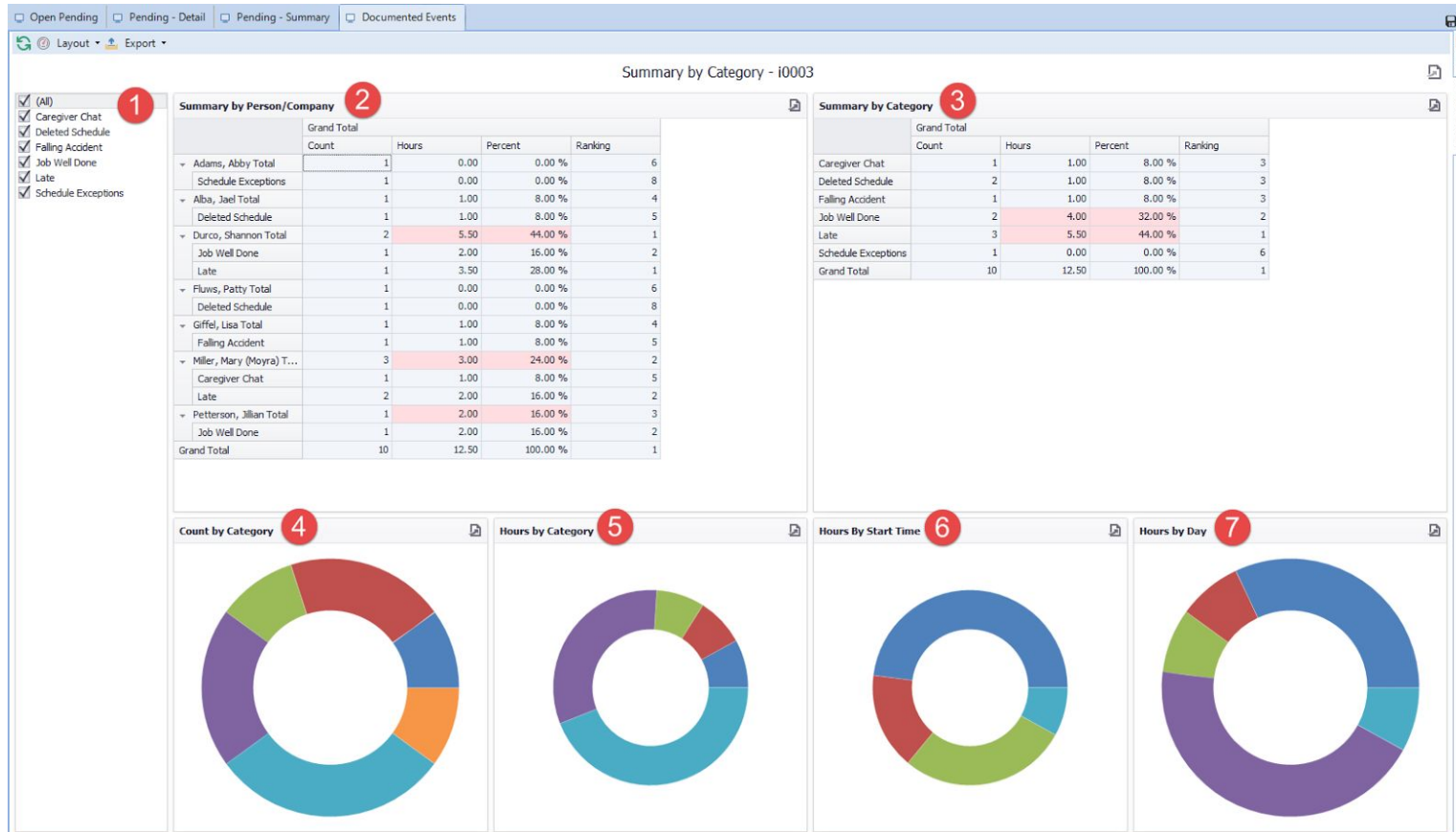


Section	Explanation
<b>1. Entity</b>	Can filter by Entity (All, Client, Caregiver, and/or Office Staff.
<b>2. Filter by Categories</b>	Can filter by Documented Event Category.
<b>3. Time of Event - Count</b>	Total Number of Documented Events at the Time of Day.
<b>4. Time of Event - Hours</b>	Total Number of Hours for Documented Events at the Time of Day.
<b>5. Day of The Week – Count</b>	Total Number of Documented Events for each Day of the Week
<b>6. Day of The Week - Hours</b>	Total Number of Hours for Documented Events for each Day of the Week.

## Documented Events Summary by Category (i0003)

Load from Reports > Clients > Documentation > Documented Events (Excel Style Reporting)

**NOTE:** You can display the same dashboard for Caregivers, Office Staff and Organizations load from Reports Module



Section	Explanation
1. <b>Category</b>	Can filter by Documented Events Categories.
2. <b>Summary by Person/Company</b>	Grouped by Entity then Category, shows Total Number of Events, Total Number of Hours, Percentage and Ranking
3. <b>Summary by Category</b>	Total Number of Events in each Category, Total Number of Hours per Category, Percentage and Ranking.
4. <b>Count by Category</b>	Visual display of Total Number of Events per Category.
5. <b>Hours by Category</b>	Visual display of Total Number of Hours per Category.
6. <b>Hours by Start Time</b>	Visual display of Total Hours of Events by Start Time.
7. <b>Hours by Day</b>	Visual display of Total Hours of Events by Hours.

## Required Dates Expired by Person (i0007)

Load from Reports > Caregivers > Documentation > Required Dates (Excel Style Report)

**NOTE:** You can display the same dashboard for Clients, and Office Staff load from Reports Module

Expired Dates by Person - i0007

**1**

 (All)  
 Mandatory  
 Optional

**3**

Expired Dates by Person.	Activity of Daily ...	Agency Orientat...	Aids Training	Alzheimer's and ...	Background/Poli...	Car Insurance	CPR Certificate	Drivers License	First Aid Certificate	Lifting Safety	Preventing Falls	Principles of Car...	RN License	TB Test
Adams, Abby			Expired		Expired	Expired			OK					
Alba, Joel			Expired	Expired	Expired	Expired		Expired	Expired					
Bourne, Elizabeth Marisa			Expired				Expired				OK			
Brookins, Joanne	Expired	Expired				Expired	Expired							
Captian, Les Paula					Expired	Expired	OK	Expired	OK					
Casillas, William	Expired													
Clarke, Frank						Expired		Expired						
Dawson, Becky					Expired	Expired	OK	Expired	OK					
Doll, Claudia Nicole					Expired	Expired	OK	Expired	OK					
Durco, Shannon						Expired	Expired	Expired	Expired	OK		Expired		
Fluvs, Patty					Expired	Expired	Expired	Expired	OK					OK
Giffel, Lisa					Expired	Expired	OK	Expired	OK	OK				
Hemming, Amanda Christ...					Expired	Expired	OK		OK					
Jackson, Jean		OK			Expired	Expired	OK		OK	OK				
James, Rick Kellie					Expired	Expired	OK	Expired	OK					
Jones, George					Expired	Expired		Expired					OK	OK
Ledie, Beatrice AMber		OK			Expired		OK		OK	OK				
McKenney, Brandon J					Expired	Expired	Expired	Expired	OK					
Miller, Mary (Moyra)							Expired		OK					
Moray, Fred						Expired	Expired	Expired	OK					
Moris, Christal Ricky					Expired	Expired	OK		OK					
Pearson, Jane		OK			Expired	Expired	OK	Expired	OK		OK			
Petterson, Jillian					Expired		OK	Expired	OK					
Rizzo, Milena			Expired		Expired		OK		OK					
Smit, June		OK			Expired		OK		OK					
Stevenson, Kevin		OK			OK		Expired		OK					
Sue W		OK			Expired	Expired	Expired		OK					
Taming, Sue		OK			Expired	Expired	OK	Expired	Expired		OK			OK
Thompson, Catherine			Expired		Expired	Expired								

**2**

**Description**

 (All)  
 Activity of Daily Living Assessment  
 Agency Orientation  
 Aids Training  
 Alzheimer's and Memory Care  
 Background/Police Check  
 Car Insurance  
 CPR Certificate  
 Drivers License  
 First Aid Certificate  
 Lifting Safety  
 Preventing Falls  
 Principles of Caregiving  
 RN License  
 TB Test

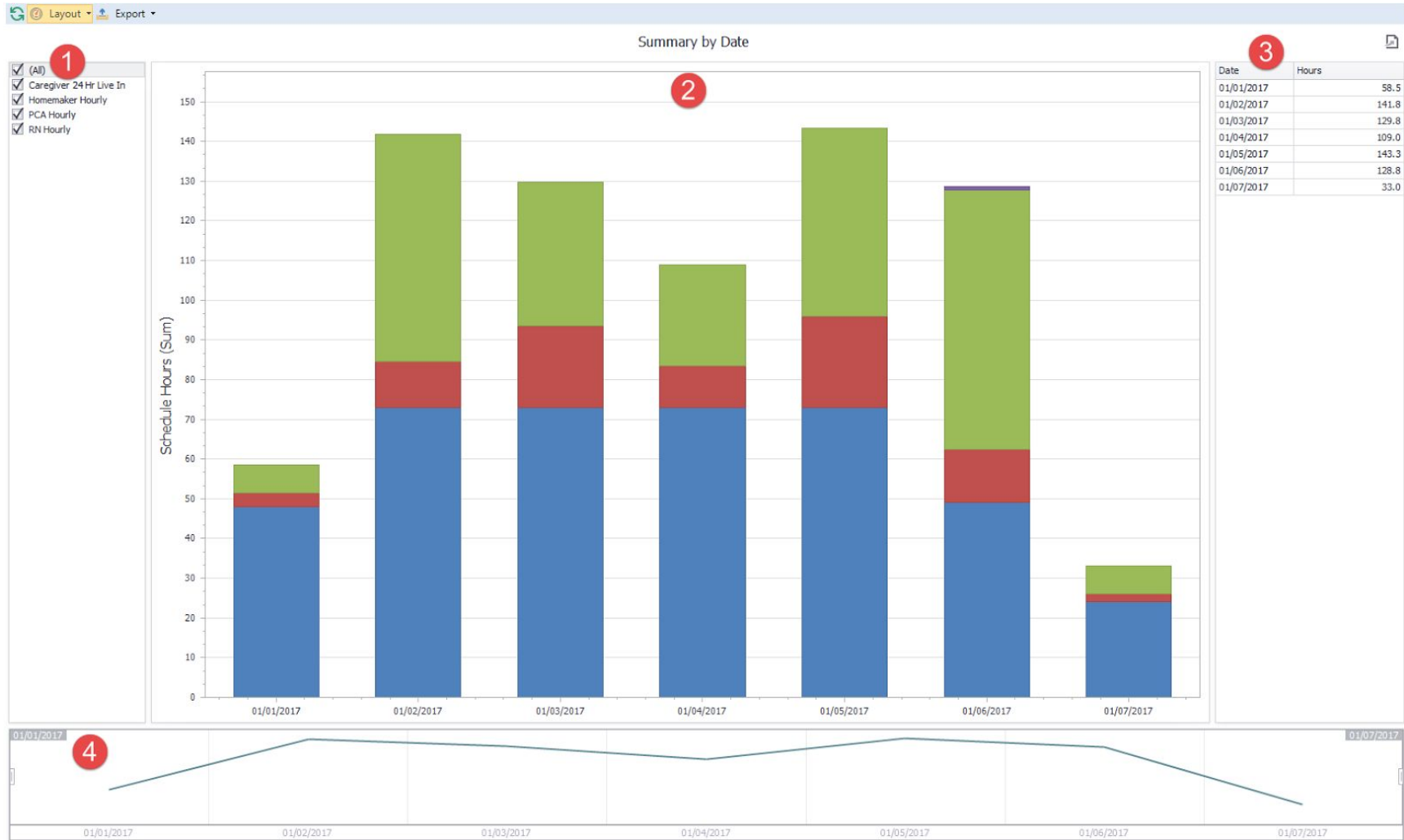
**NOTE:** A blank cell means the person does not have the corresponding required date.

Section	Explanation
4. Required Date Type	Filter by Required Date Type (All, Mandatory and/or Optional)
5. Description	Filter by Required Date Description
6. Expired Dates by Person	Required Dates Display by Person by Required Date Description

# Scheduling Data Grid Dashboards

## Summary by Day (d0001)

Load from Review screen or Finance Module, Process screen.



Section	Explanation
<b>1. Call Type</b>	Can filter by Call Types (Services).
<b>2. Scheduled Hours by Day (graph)</b>	Visual display of Total Number of Scheduled Hours by Day.
<b>3. Scheduled Hours by Day (table)</b>	Table listing Each Day and the Total Number of Hours.
<b>4. Scheduled Hours by Day (graph)</b>	Line graph showing a trend of the Total Number of Hours for each day.

# Summary by Day of the Week (d0002)

Load from Review screen or Finance Module, Process screen.



Section	Explanation
1. Call Type	Can filter by Call Types (Services).
2. Day of the Week (graph)	Visual display of Total Number of Scheduled Hours by Day of the Week.
3. Scheduled Hours	Table listing Each Day of the Week and the Total Number of Scheduled Hours.
4. Start Time (graph)	Visual display of Total Number of Scheduled Hours by Start Time.
5. Scheduled Hours	Table listing Start Time and the Total Number of Scheduled Hours.
6. Scheduled Hours by Day (graph)	Line graph showing a trend of the Total Number of Hours for each day.

# Summary by Month (d0003)

Load from Review screen or Finance Module, Process screen.

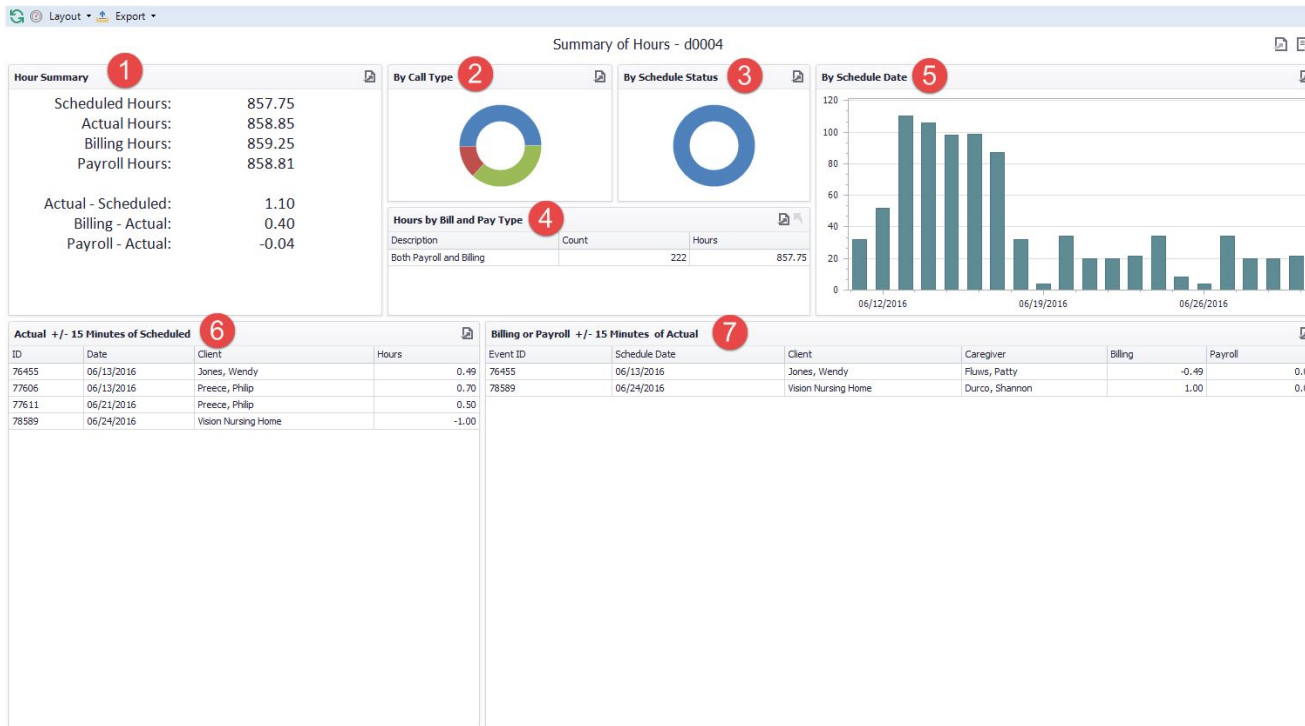


Section	Explanation
1. Call Type	Can filter by Call Types (Services).
2. Summary (graph)	Visual display of Total Number of Scheduled Hours by the Month.
3. Scheduled Hours	Table listing Each Month/Year and the Total Number of Scheduled Hours for the month.
4. Line Graph	Visual display of Total Number of Scheduled Hours by Month



## Summary of Finalized Hours (d0004)

Load from *Schedule Review* screen or *Finance* Module, *Process* screen.



**\*\*Must use the Finalize Scenario**  
 After importing this dashboard, you must add two new columns using the column chooser.

- **Hour Code**
- **Event ID**

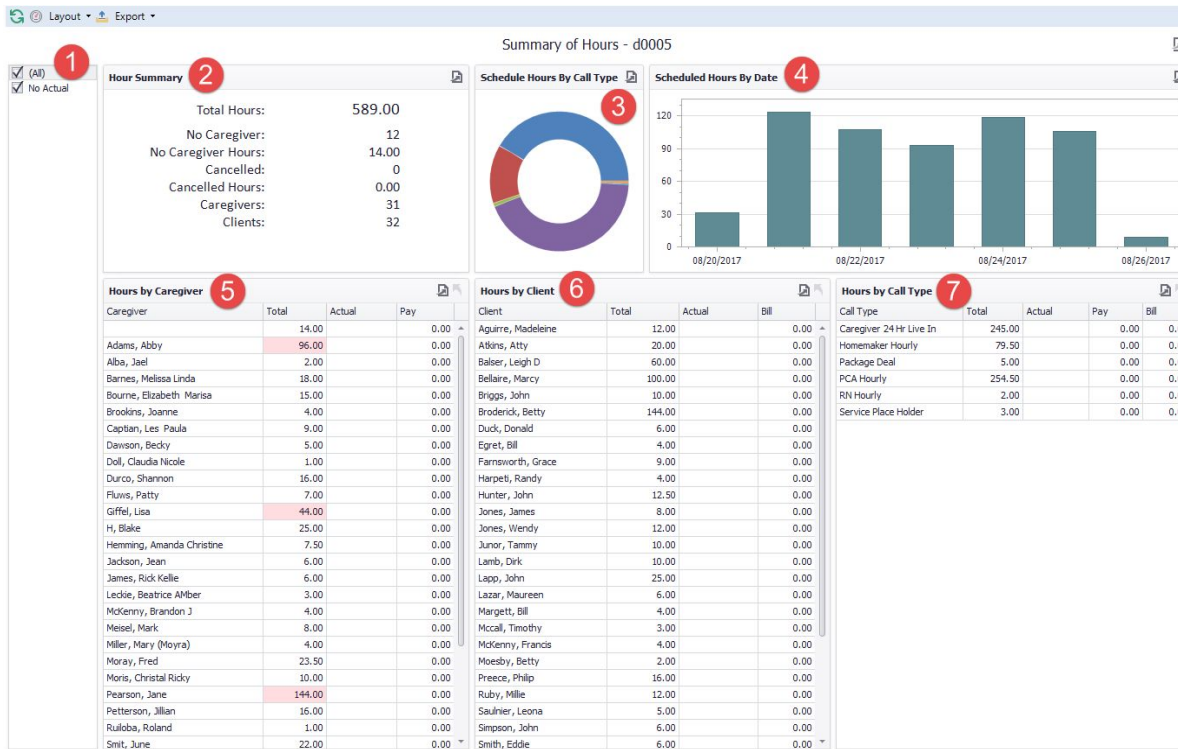
After adding these two columns, save your layout again.  
 If you do not add these two columns, the dashboard will not display all the data.

**NOTE: Must set the Scenario to 'Finalized'.**

Section	Explanation
<b>1. Hour Summary</b>	Total Number of Scheduled Hours, Total Number of Actual Hours, Total Number of Billing Hours, Total Number of Payroll Hours, Total Actual Hours minus Total Scheduled Hours, Total Number of Billing Hours minus Total Number of Actual Billing Hours, Total Number of Payroll Hours minus Total Number of Actual Hours.
<b>2. By Call Type (graph)</b>	Graphical display of Total Number of Hours by Call Type and Percentage of the Total Hours.
<b>3. By Schedule Status (graph)</b>	Graphical display of Total Number of Hours by Schedule Status and Percentage of the Total Hours.
<b>4. Hours by Bill and Pay Type</b>	Total Number of Hours by Hour Code (Both Payroll and Billing, No Payroll Only Billing, No Billing Only Payroll, Neither Billing or Payroll)
<b>5. By Schedule Date (bar chart)</b>	Graphical display of Total Number of Hours by Date
<b>6. Actual + / - 15 Minutes of Scheduled</b>	Over or Under 15 minutes of Scheduled Hours by date
<b>7. Billing or Payroll + / - 15 Minutes of Actual</b>	Over or Under 15 minutes of Actual Hours by date

# Summary of Hours (d0005)

Load from Schedule Review screen



**Rules:** If **Total** or **Payroll Hours** are:

Range	Color
>= 40	RED
35 to 39	YELLOW

If **Bill Hours** or **Pay Hours** <> **Actual Hours** (column will be highlighted in ORANGE)

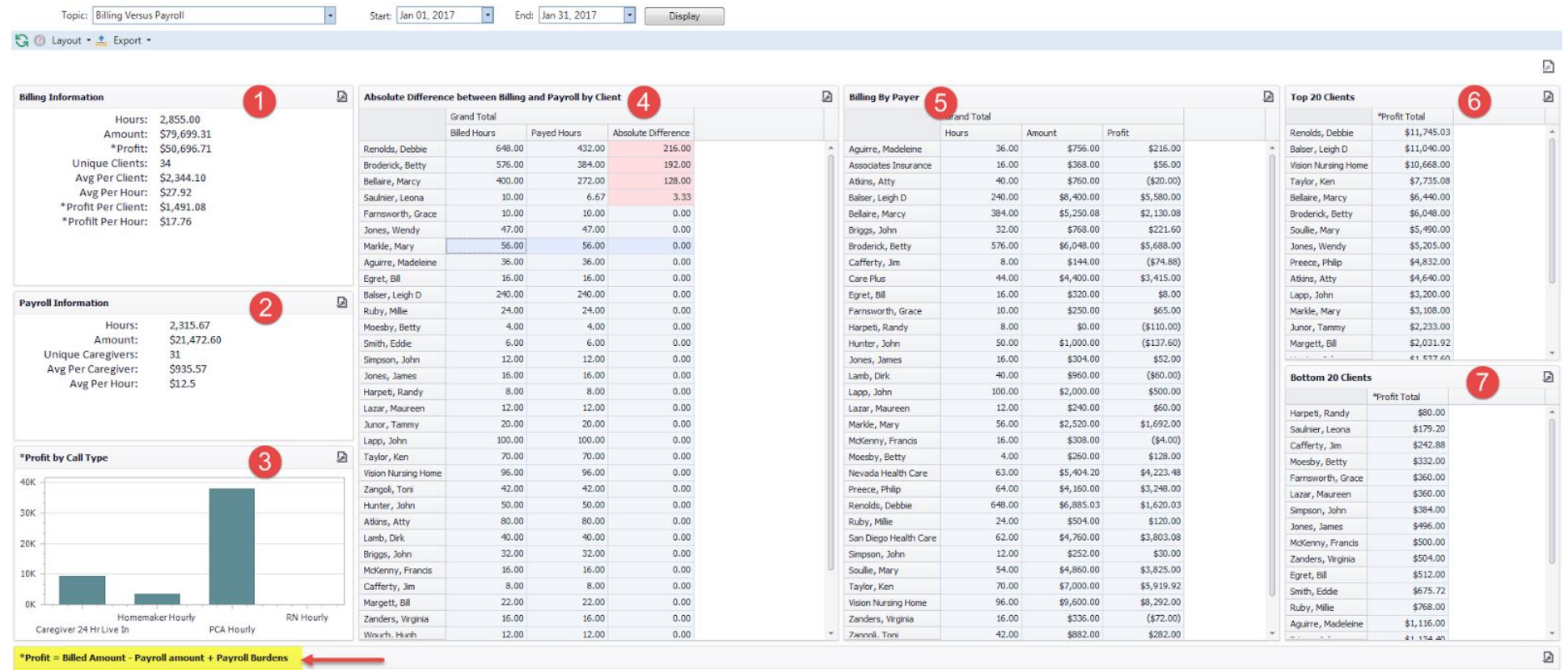
Section	Explanation
<b>1. Schedule Status</b>	Can filter by Schedule Status.
<b>2. Hours Summary</b>	Total Number of Hours, Total Number of Schedules with No Caregiver, Total Number of Scheduled Hours with No Caregiver, Total Number of Schedules Cancelled, Total Number of Cancelled Scheduled Hours, Total Number of Caregivers, and Total Number of Clients.
<b>3. Schedule Hours by Call Type</b>	Visual display of Total Number of Scheduled Hours by Call Type.
<b>4. Scheduled Hours by Date</b>	Visual display of Total Number of Schedules Hours by Date.
<b>5. Hours by Caregiver</b>	Total Number of Scheduled Hours, Total Number of Actual Hours, and Total Number of Hours to be Paid by Caregiver.
<b>6. Hours by Client</b>	Total Number of Scheduled Hours, Total Number of Actual Hours, and Total Number of Hours to be Billed by Client.
<b>7. Hours by Call Type (Services)</b>	Total Number of Scheduled Hours, Total Number of Actual Hours, Total Number of Hours to be Billed and Total Number of Hours to be Paid by Call Type.

# Management Dashboards

## Owner/Management


### Billing Versus Payroll

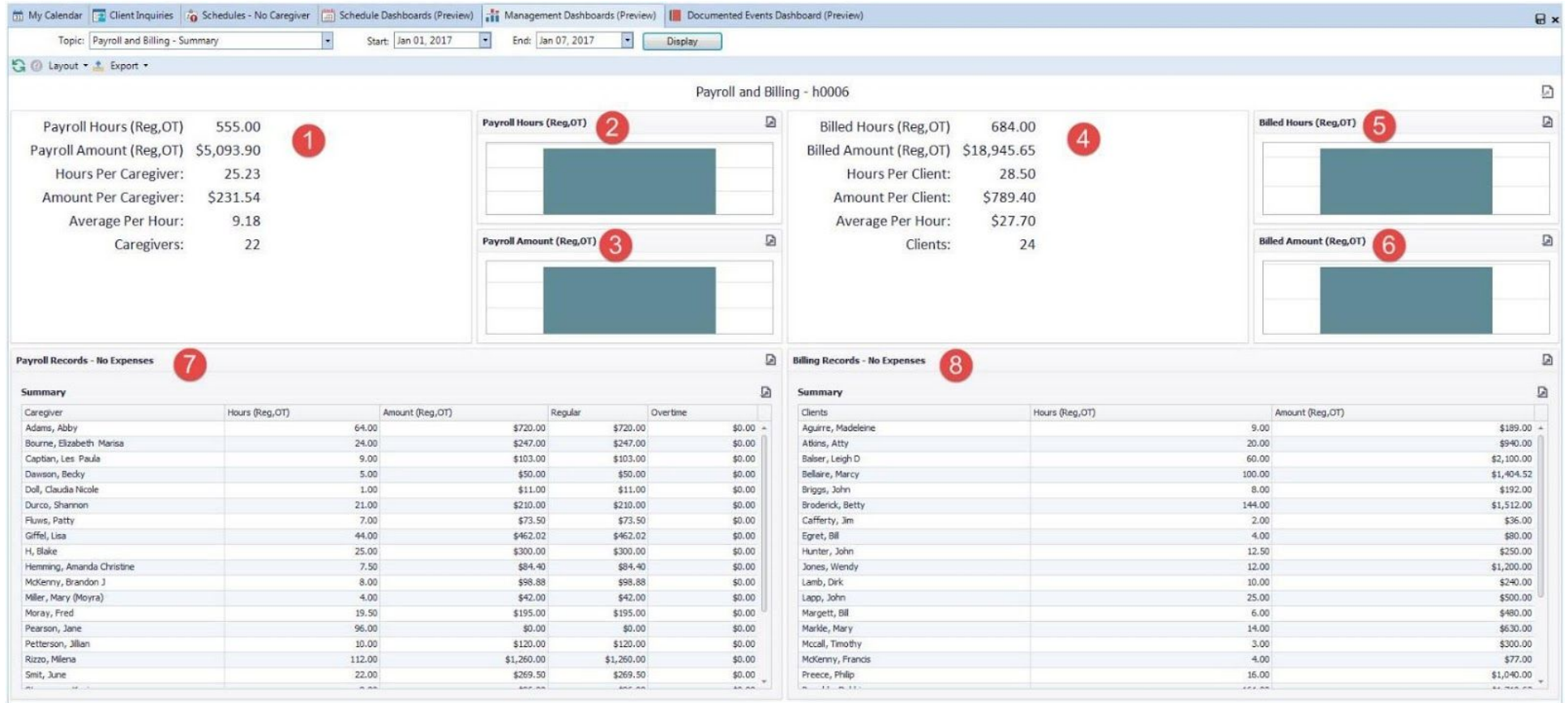
Load dashboard from under 'Home' . 



Section	Explanation
1. Billing Information	Breakdown of the Billing Hours, Total Dollar Amount, Profit, Number of Clients, Avg. Dollar Amount per Client, Avg. Dollar Amount per Hour, Profit per Client, Profit per Hour.
2. Payroll Information	Breakdown of Payroll Hours, Total Dollar Amount, Number of Caregivers, Avg. Dollar Amount per Caregiver, Avg. Per Hour.
3. Profit by Call Type	Visual display of Total Profit per Call Type.
4. Absolute Difference between Billing and Payroll by Client	Total Billing Hours, Payroll Hours and Absolute Difference per Client
5. Billing by Payer	Total Billing Hours, Dollar Amount and Profit per Payer (Clients and/or Third Party Payers)
6. Top 20 Clients	Top 20 Client by Profit Total.
7. Bottom 20 Clients	Bottom 20 Clients by Profit Total.

# Payroll and Billing Summary (h0006)

Load dashboard from under 'Home'. 



Section	Explanation
<b>1. Payroll Information</b>	Total Payroll Hours (Reg., OT), Total Payroll Dollar Amount (Reg., OT), Hours Per Caregiver (Payroll Hours/Total Caregivers), Amount Per Caregiver(Payroll Amount (Reg.,OT)/Total Caregivers), Average per Hours(Payroll Hours(Reg., OT)/Total Caregivers), Average Per Hour(Payroll Hours(Reg., OT)/Total Caregivers), Total number of Caregivers
<b>2. Payroll Hours (Reg., OT)</b>	Total Payroll Hours Month/Year.
<b>3. Payroll Amount (Reg., OT)</b>	Total Payroll Dollar Amount by Month/Year.
<b>4. Billing Information</b>	Total Billing Hours (Reg., OT), Total Billed Dollar Amount (Reg., OT), Hours Per Client (Billed Hours/Total Clients), Amount Per Client(Billed Amount (Reg.,OT)/Total Clients), Average per Hours(Billed Hours(Reg., OT)/Total Clients), Average Per Hour(Billed Hours(Reg., OT)/Total Clients), Total number of Clients
<b>5. Billing Hours (Reg., OT)</b>	Total Billing Hours Month/Year.
<b>6. Billing Amount (Reg., OT)</b>	Total Billing Dollar Amount by Month/Year.
<b>7. Payroll Records – No Expenses</b>	Total Hours (Reg., OT) and Dollar Amount (Reg., OT), Regular Dollar Amount and Overtime Dollar Amount with No Expenses by Caregiver
<b>8. Billing Records – No Expenses</b>	Total Hours (Reg., OT) and Dollar Amount (Reg., OT) with No Expenses by Client

# Billing Summary (h0017)

Load dashboard from under 'Home'.

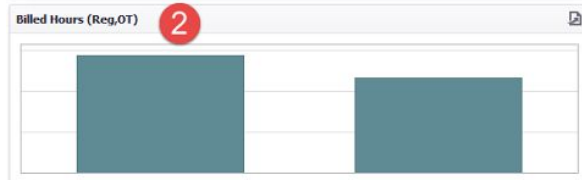


Topic: Billing Summary Start: Jan 01, 2017 End: Feb 28, 2017 Display

Layout Export

Billing - h0017

Billed Hours (Reg,OT)	5,178.50
Billed Amount (Reg,OT)	\$157,309.29
Hours Per Client:	152.31
Amount Per Client:	\$4,626.74
Average Per Hour:	\$30.38
Clients:	34



Billing Records - No Expenses			
Summary			
Clients	Hours (Reg,OT)	Amount (Reg,OT)	
Aguirre, Madeleine	75.00	\$1,575.00	
Atkins, Atty	160.00	\$7,520.00	
Balser, Leigh D	480.00	\$16,800.00	
Bellaire, Marcy	800.00	\$11,236.16	
Briggs, John	72.00	\$1,808.00	
Broderick, Betty	1,152.00	\$12,096.00	
Cafferty, Jim	16.00	\$288.00	
Egret, Bill	32.00	\$640.00	
Farnsworth, Grace	34.00	\$850.00	
Harpert, Randy	24.00	\$288.00	
Hunter, John	80.00	\$1,600.00	
Jones, James	48.00	\$944.00	
Jones, Wendy	95.00	\$9,500.00	
Junor, Tammy	60.00	\$6,000.00	
Lamb, Dirk	80.00	\$1,920.00	
Lapp, John	200.00	\$4,000.00	
Lazar, Maureen	36.00	\$720.00	
Margett, Bill	38.00	\$3,040.00	
Marke, Mary	108.50	\$4,882.50	
Mccall, Timothy	24.00	\$2,400.00	
McKenny, Francis	32.00	\$616.00	
Moesby, Betty	12.00	\$780.00	
Preece, Philip	128.00	\$8,320.00	
Renolds, Debbie	648.00	\$6,885.03	
Ruby, Mille	72.00	\$1,512.00	
Saunier, Leona	30.00	\$312.60	
Simpson, John	36.00	\$756.00	
Smith, Eddie	18.00	\$1,800.00	
Soulie, Mary	110.00	\$9,900.00	
Taylor, Ken	142.00	\$14,200.00	
Vision Nursing Home	192.00	\$19,200.00	
Wouch, Hugh	24.00	\$2,400.00	
Zanders, Virginia	36.00	\$756.00	

Section	Explanation
1. Billing Information	Total Billing Hours (Reg., OT), Total Billed Dollar Amount (Reg., OT), Hours Per Client (Billed Hours/Total Clients), Amount Per Client(Billed Amount (Reg., OT)/Total Clients), Average per Hours(Billed Hours(Reg., OT)/Total Clients), Average Per Hour(Billed Hours(Reg., OT)/Total Clients), Total number of Clients
2. Billing Hours (Reg., OT)	Total Billing Hours Month/Year.
3. Billing Amount (Reg., OT)	Total Billing Dollar Amount by Month/Year.
4. Billing Records – No Expenses	Total Hours (Reg., OT) and Dollar Amount (Reg., OT) with No Expenses by Client

# Payroll Summary (h0018)

Load dashboard from under 'Home'.

My Calendar Client Inquiries Schedules - No Caregiver Schedule Dashboards (Preview) Management Dashboards (Preview) Documented Events Dashboard (Preview)

Topic: Payroll Summary Start: Jan 01, 2017 End: Feb 28, 2017 Display

Layout Export

### Payroll - h0018

**1**

Payroll Hours (Reg,OT) 4,312.50

Payroll Amount (Reg,OT) \$39,389.26

Hours Per Caregiver: 139.11

Amount Per Caregiver: \$1,270.62

Average Per Hour: 9.13

Caregivers: 31

**4**

**Payroll Records - No Expenses**

**Summary**

Caregiver	Hours (Reg,OT)	Amount (Reg,OT)	Regular	Overtime
Adams, Abby	515.50	\$5,802.00	\$5,802.00	\$0.00
Alba, Jael	12.00	\$216.00	\$216.00	\$0.00
Barnes, Melissa Linda	72.00	\$792.00	\$792.00	\$0.00
Bourne, Elizabeth Marisa	185.00	\$1,902.50	\$1,902.50	\$0.00
Brookins, Joanne	16.00	\$180.00	\$180.00	\$0.00
Captian, Les Paula	72.00	\$824.00	\$824.00	\$0.00
Dawson, Becky	40.00	\$400.00	\$400.00	\$0.00
Doll, Claudia Nicole	7.00	\$77.00	\$77.00	\$0.00
Durco, Shannon	146.00	\$1,460.00	\$1,460.00	\$0.00
Fluws, Patty	56.00	\$588.00	\$588.00	\$0.00
Giffel, Lisa	350.00	\$3,675.16	\$3,675.16	\$0.00
H, Blake	200.00	\$2,400.00	\$2,400.00	\$0.00
Hemming, Amanda Christine	60.00	\$675.20	\$675.20	\$0.00
Jackson, Jean	36.00	\$396.00	\$396.00	\$0.00
James, Rick Kellie	36.00	\$360.00	\$360.00	\$0.00
Leckie, Beatrice Amber	18.00	\$227.16	\$227.16	\$0.00
McKenny, Brandon J	54.00	\$667.44	\$667.44	\$0.00
Meisel, Mark	48.00	\$576.00	\$576.00	\$0.00
Miller, Mary (Moyra)	39.00	\$414.00	\$414.00	\$0.00
Moray, Fred	180.00	\$1,800.00	\$1,800.00	\$0.00
Morris, Christal Ricky	60.00	\$699.00	\$699.00	\$0.00
Pearson, Jane	768.00	\$0.00	\$0.00	\$0.00
Petterson, Jillian	114.00	\$1,334.00	\$1,334.00	\$0.00
Rizzo, Milena	432.00	\$4,860.00	\$4,860.00	\$0.00
Ruiloba, Roland	4.00	\$45.00	\$45.00	\$0.00
Smit, June	176.00	\$2,156.00	\$2,156.00	\$0.00
Stevenson, Kevin	64.00	\$768.00	\$768.00	\$0.00
Sue W	40.00	\$410.00	\$410.00	\$0.00
Swile, Jeremiah	160.00	\$1,760.00	\$1,760.00	\$0.00
Taming, Sue	32.00	\$404.80	\$404.80	\$0.00
Thomas, Alfred	320.00	\$3,520.00	\$3,520.00	\$0.00

**2**


Payroll Hours (Reg,OT)

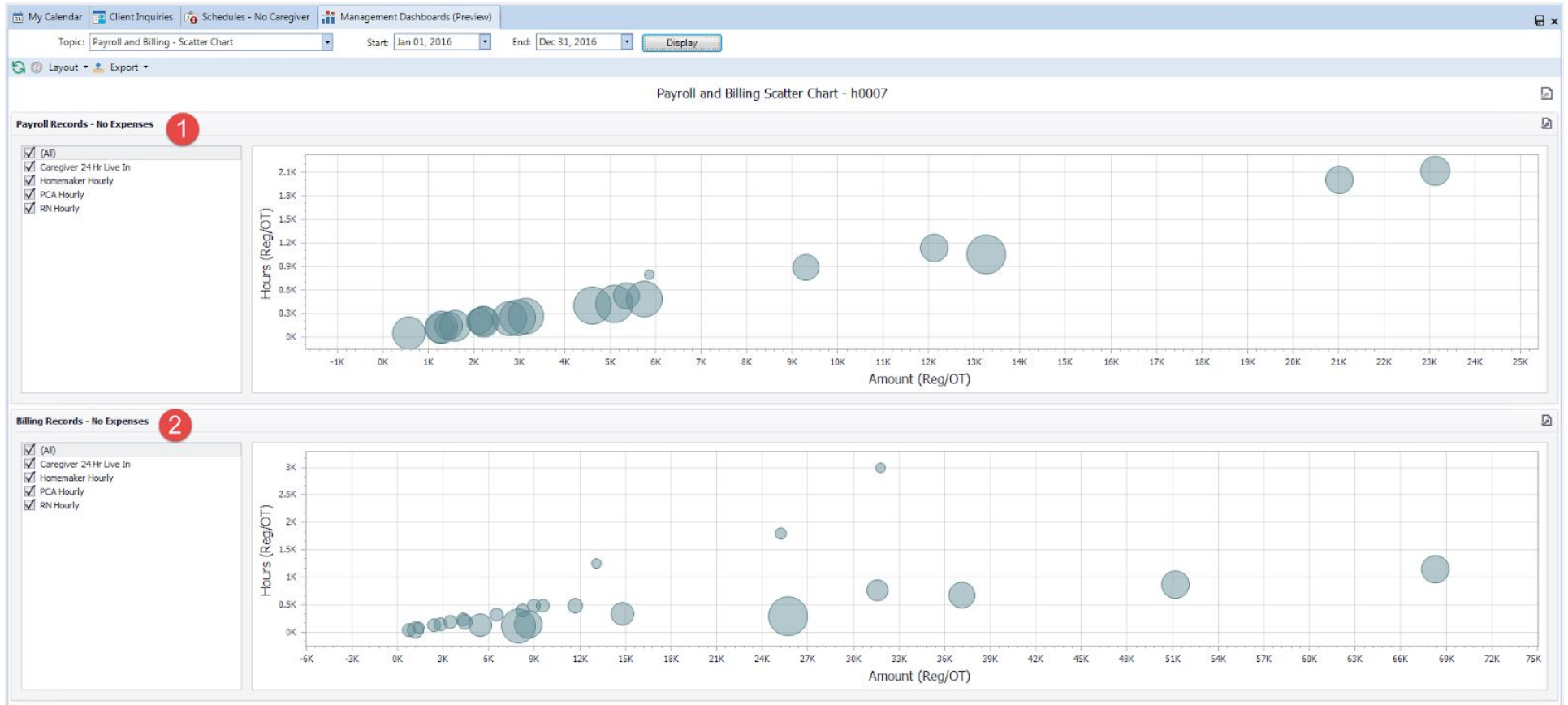
**3**

Payroll Amount (Reg,OT)

Section	Explanation
<b>1. Payroll Information</b>	Total Payroll Hours (Reg., OT), Total Payroll Dollar Amount (Reg., OT), Hours Per Caregiver (Payroll Hours/Total Caregivers), Amount Per Caregiver(Payroll Amount (Reg.,OT)/Total Caregivers), Average per Hours(Payroll Hours(Reg., OT)/Total Caregivers), Average Per Hour(Payroll Hours(Reg., OT)/Total Caregivers), Total number of Caregivers
<b>2. Payroll Hours (Reg., OT)</b>	Total Payroll Hours Month/Year.
<b>3. Payroll Amount (Reg., OT)</b>	Total Payroll Dollar Amount by Month/Year.
<b>4. Payroll Records – No Expenses</b>	Total Hours (Reg., OT) and Dollar Amount (Reg., OT), Regular Dollar Amount and Overtime Dollar Amount with No Expenses by Caregiver


# Payroll and Billing - Scatter Chart (h0007)

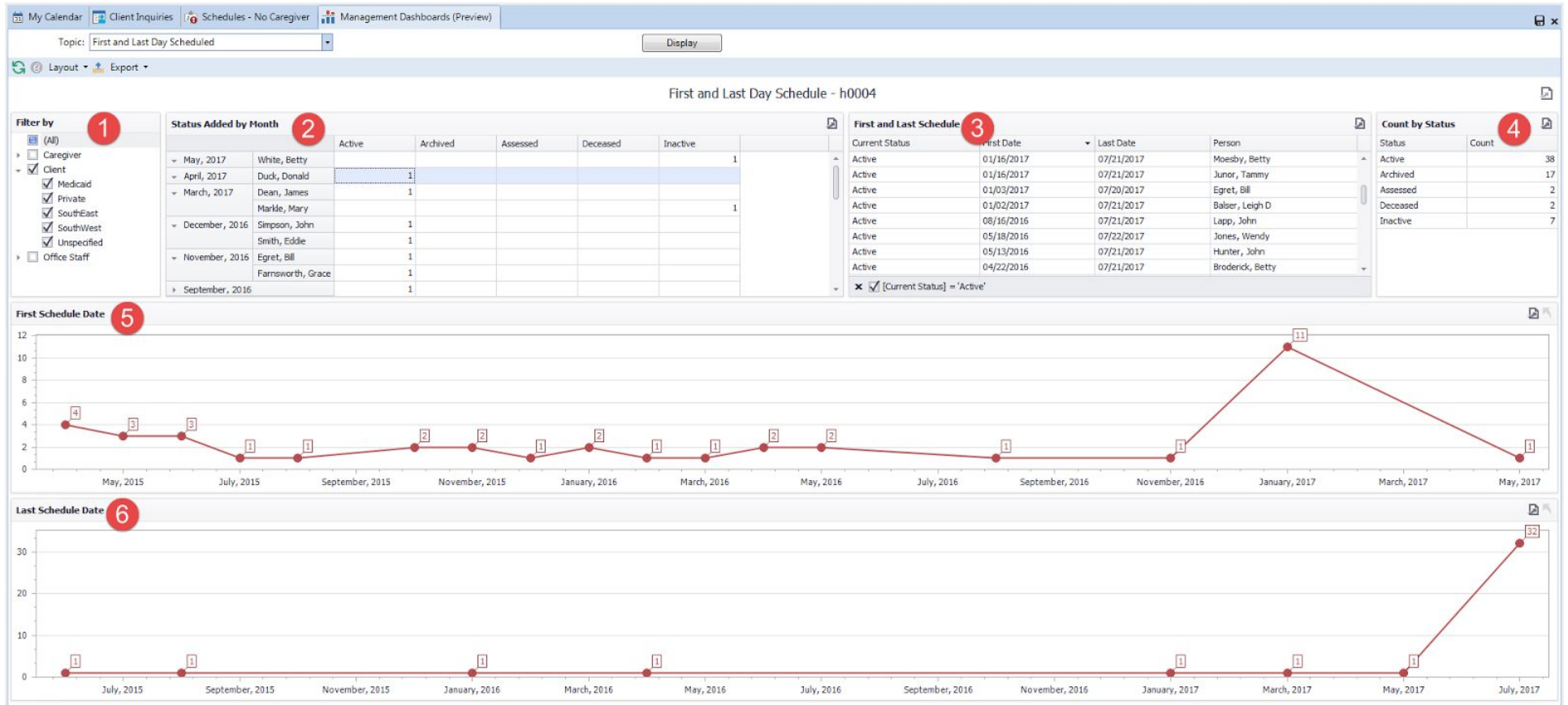
Load dashboard from under 'Home'. 



Section	Explanation
1. Payroll Records – No Expenses (Filter by Service)	Visual display showing Total Payroll Dollars (Reg., OT) Paid, Total Hours (Reg., OT), and Avg. Per Hours for each Caregiver.
2. Billing Records – No Expenses (Filter by Service)	Visual display showing Total Billing Dollars (Reg., OT), Total Hours (Reg., OT), and Avg. Per Hours for each Client.

# First and Last Day Scheduled (h0004)


Load dashboard from under 'Home'. 



Section	Explanation
1. Filter By	Can filter by Entity (All, Client, Caregiver and/or Office Staff)
2. Status Added by Month	Entities added by Month/Year for each Status (Potential, Assessed, Active, InActive, Deceased and Archived).
3. First and Last Schedule	A list of Entities by Status with their First and Last Schedule Date.
4. Count by Status	Total number of Entities by Status
5. First Schedule Date (graph)	Visual display of the First Schedule Date by Entity
6. Last Schedule Date (graph)	Visual display of the Last Schedule Date by Entity



# Status Added by Referral Source (h0005)

Load dashboard from under 'Home'. 

My Calendar | Client Inquiries | Schedules - No Caregiver | Management Dashboards (Preview)

Topic: Status Added by Referral Source Display

Layout | Export

### Status Added by Referral Source - h0005

**Filter By** 1

(All)

Caregiver

Client

Office Staff

**Status Type** 2

(All)

Active

Archived

Assessed

Deceased

Inactive

Potential

**Category** 3

(All)

Contractor

Hourly

Medicaid

Office

Office Manager

Owner

Private

Sales Person

Scheduler

SouthEast

SouthWest

Unspecified

**Current Status** 4

	Active			Archived			Assessed			Deceased			Inactive		
	Count	Avg Active Days	Months	Count	Avg Active Days	Months	Count	Avg Active Days	Months	Count	Avg Active Days	Months	Count	Avg Active Days	Months
May, 2017				3									1	15.0	
April, 2017	1	104.0		3											
March, 2017	1	133.0		4											
December, 2016	2	239.0		8											
November, 2016	2	274.0		9									1	125.0	
August, 2016	1	352.0		12											
July, 2016	1	372.0		12											
June, 2016	2	424.0		14											
May, 2016	7	440.0		14											
April, 2016	2	475.0		16											
March, 2016	1	510.0		17											
February, 2016	1	534.0		18											
January, 2016	1	573.0		19									1	21.0	
December, 2015	2	595.5		20											

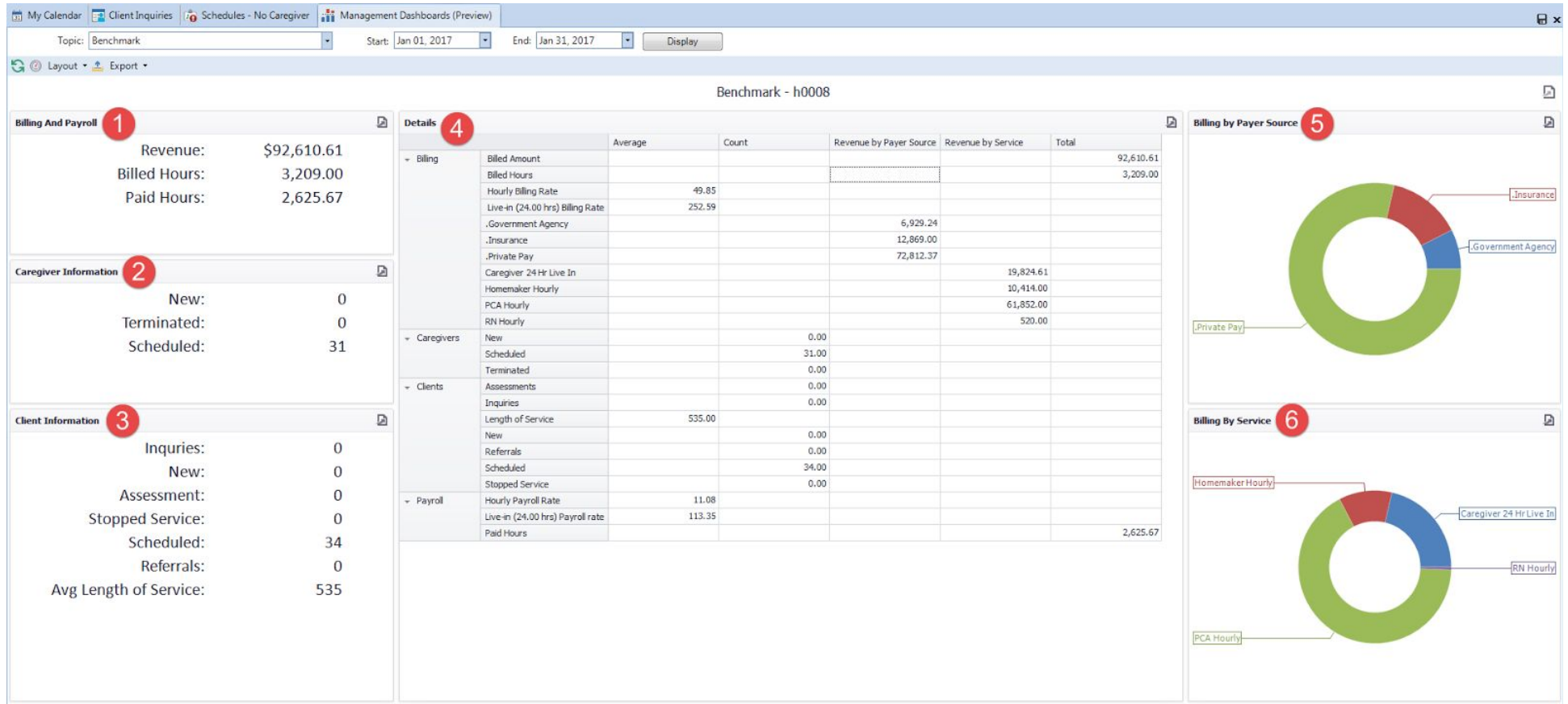
**By Referral Source** 5

	Active			Archived			Assessed			Deceased			Inactive		
	Count	Avg Active Days	Months	Count	Avg Active Days	Months	Count	Avg Active Days	Months	Count	Avg Active Days	Months	Count	Avg Active Days	Months
	4	408	13	13	1								3	48.7	
760 AM KPMB Talk Radio	2	536	18	1			1						1	301	
Better HealthCare	5	455	15										1	125	
Care Plus							1								
Church of Christ	2	371	12												
Client Referral	4	590	19				1								
Coronado Hospital	1	534	18				1								
Doctors Hospital	2	278	9												
Elizabeth Lafkas Workers							1								
Harvey Simmons MD	1	426	14												
Hope Baptist Church	1	723	24												
Mercy Health Center	1	667	22												
Mercy Hospital and Medical Center	2	626	21				2								
Miami Hospital													1	94	

Section	Explanation
<b>1. Filter By</b>	Can filter by Entity (All, Client, Caregiver and/or Office Staff)
<b>2. Status Type</b>	Can filter by Status (All, Potential, Assessed, Active, InActive, Deceased and Archived)
<b>3. Category</b>	Can filter by Entity Categories (All, Client, Caregiver and/or Office Staff)
<b>4. Current Status</b>	A list of Entities by Month/Year for each Status (Potential, Assessed, Active, InActive, Deceased and Archived).
<b>5. By Referral Source</b>	Total Number of Entities by Referral Source (Organization) for each Status (Potential, Assessed, Active, InActive, Deceased and Archived). Avg. Number of Days per Status Number of Months per Status.


# Benchmark (h0008)

Load dashboard from under 'Home'.

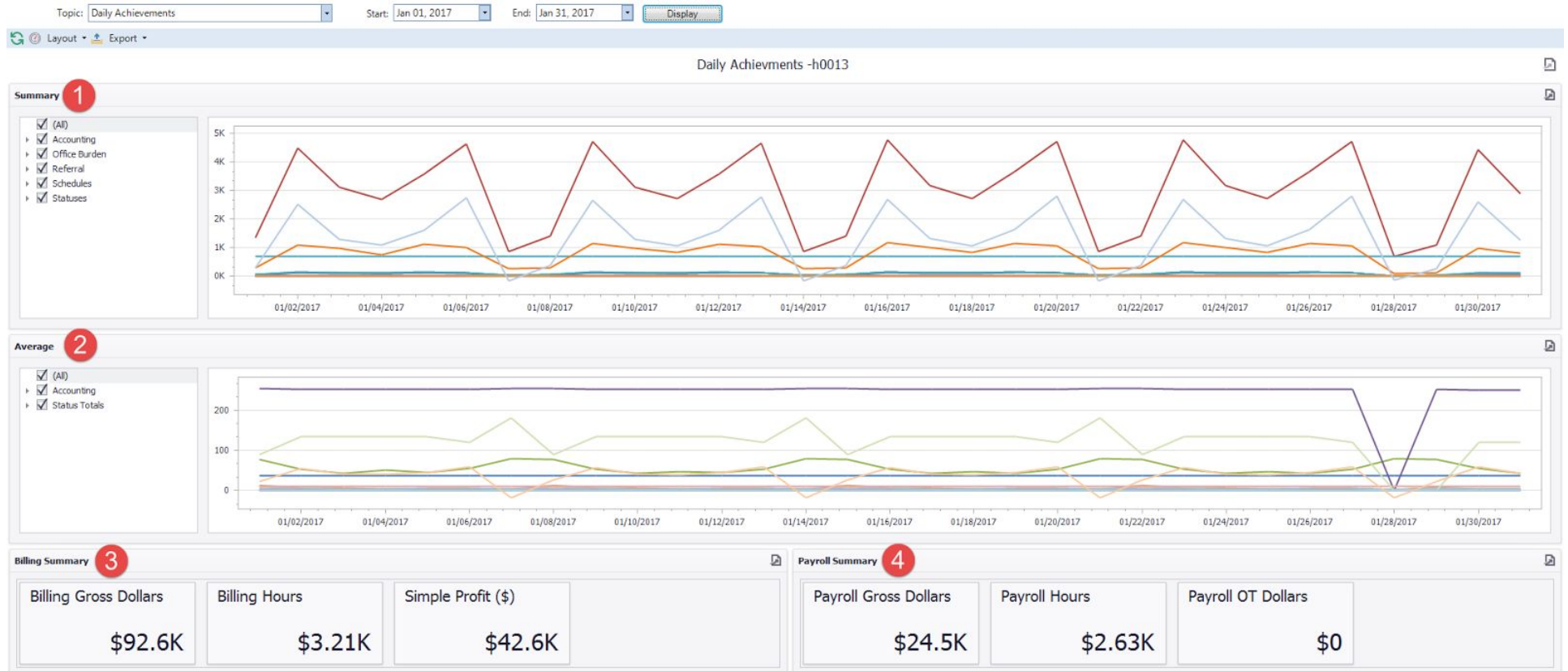


Section	Explanation
1. Billing and Payroll	Total Revenue, Total Billed Hours, and Total Paid Hours
2. Caregiver Information	Number of New Caregivers, Number of Terminated Caregivers and Number of Scheduled Caregivers
3. Client Information	Number of Inquiries Received, Number of New Clients, Number of Assessed Clients, Number of Clients who Stopped Service, Number of Clients Scheduled, Number of Referrals added and Avg. Length of Service for the Number of Clients
4. Details	<p><b>Billing:</b> Total Dollar Amount Billed, Total Number of Hours Billed, Average Hourly Billing Rate, Average Line-in (24hrs) Billing Rate, Breakdown of Revenue by Payer Source (Third Party Payers), Breakdown of Revenue by Service</p> <p><b>Caregivers:</b> Total Number of Caregivers, Total Number of Caregivers Scheduled and Total Number Terminated.</p> <p><b>Clients:</b> Total Number Client Assessments, Total Number of Inquiries, Avg. Length of Service, Total Number of Clients, Total Number of Referrals, Total Number of Scheduled Clients, Total Number of Clients who Stopped Service.</p> <p><b>Payroll:</b> Avg. Hourly Payroll Rate, Avg. Live-in 24 hr Payroll Rate, and Total Number of Hours Paid.</p>
5. Billing by Payer Source (graph)	Visual display of Billing by Payer Sources (Third Party Payers) showing Total Revenue and what percentage of total.
6. Billing by Service (graph)	Visual display of Billing by Service showing Total Revenue and what percentage of total.

# Achievements (h0013)

Load dashboard from under 'Home'. 

**Prerequisite:** Must have Daily Achievements set up in Agency Office > Review (tab)> Achievements



Section	Explanation
1. Summary	Daily Count of Accounting, Office Burden, Referral, Schedules and Statuses Achievements
2. Average	Average for Accounting and Status Achievements
3. Billing Summary	Summary of Billing Gross Dollars, Billing Hours and Simple Profile(\$)
4. Payroll Summary	Summary of Payroll Gross Dollars, Payroll Hours and Payroll OT Dollars(\$)

# Billing Data Grid Dashboards

## Billing Summary (e0001)

Load from Billing View Posted screen.

Layout Export
Billing Summary - e0001

**Call Type** 1

 (All)  
 Caregiver 24 Hr Live In  
 Homemaker Hourly  
 PCA Hourly  
 RN Hourly

**Summary** 4

Caregiver (Count)	Total Hours	Total Amount	Avg Per Hour	Unique Clients	Unique Caregivers	Min Rate
128	567.00	\$18,753.12	\$33.07	32	31	\$10.00
Max Rate	OT Hours	OT Amount				
\$252.00	60.00	\$937.52				

**Description** 2

 (All)  
 Overtime Daily  
 Regular

**Totals by Client** 5

Client	Record Count	Gross Hours	Gross Amount	Per Hour	Units	Caregivers
Aguirre, Madeleine	3	9.0	\$189.00	\$21	0	1
Atkins, Atty	7	20.0	\$940.00	\$47	0	2
Balsler, Leigh D	3	60.0	\$2,100.00	\$35	0	2
Bellaire, Marcy	6	100.0	\$1,404.52	\$14	0	2
Briggs, John	5	10.0	\$250.00	\$25	1	2
Broderick, Betty	6	144.0	\$1,512.00	\$10.5	0	1
Cafferty, Jim	2	2.0	\$36.00	\$18	0	1
Egret, Bill	2	4.0	\$80.00	\$20	0	1
Farnsworth, Grace	3	6.0	\$150.00	\$25	0	1
Harpets, Randy	1	4.0	\$40.00	\$10	0	1
Hunter, John	6	8.5	\$170.00	\$20	0	2
Jones, James	2	8.0	\$160.00	\$20	0	1
Jones, Wendy	5	12.0	\$1,200.00	\$100	0	3
Junor, Tammy	5	10.0	\$1,000.00	\$100	0	1
Lamb, Dirk	10	10.0	\$240.00	\$24	0	1
Lapp, John	5	25.0	\$500.00	\$20	0	1
Lazar, Maureen	2	6.0	\$120.00	\$20	0	1
Margett, Bill	2	4.0	\$320.00	\$80	0	1
Mccall, Timothy	3	3.0	\$300.00	\$100	0	2
McKerny, Francis	2	4.0	\$77.00	\$19.3	0	1
Moesby, Betty	2	2.0	\$130.00	\$65	0	1
Preece, Philip	4	16.0	\$1,040.00	\$65	0	1
Ruby, Millie	4	12.0	\$252.00	\$21	0	1
Saulnier, Leona	5	5.0	\$52.10	\$10.4	0	2
Simpson, John	3	6.0	\$126.00	\$21	0	1
Smith, Eddie	3	3.0	\$300.00	\$100	0	1
Soulie, Mary	7	14.0	\$1,260.00	\$90	0	2
Taylor, Ken	6	18.0	\$1,800.00	\$100	0	1
Vision Nursing Home	4	24.0	\$2,400.00	\$100	0	2
Wouch, Hugh	3	3.0	\$300.00	\$100	0	1

**Totals by Payer** 6

Payer	Record Count	Gross Hours	Gross Amount	Per Hour	Units	Clients
Aguirre, Madeleine	3	9.0	\$189.00	\$21	0	1
Associates Insurance	2	4.0	\$92.00	\$23	0	1
Atkins, Atty	5	10.0	\$190.00	\$19	0	1
Balsler, Leigh D	3	60.0	\$2,100.00	\$35	0	1
Bellaire, Marcy	4	96.0	\$1,312.52	\$13.7	0	1
Briggs, John	5	10.0	\$250.00	\$25	1	1
Broderick, Betty	6	144.0	\$1,512.00	\$10.5	0	1
Cafferty, Jim	2	2.0	\$36.00	\$18	0	1
Care Plus	11	16.0	\$1,600.00	\$100	0	3
Egret, Bill	2	4.0	\$80.00	\$20	0	1
Farnsworth, Grace	3	6.0	\$150.00	\$25	0	1
Harpets, Randy	1	4.0	\$40.00	\$10	0	1
Hunter, John	6	8.5	\$170.00	\$20	0	1
Jones, James	2	8.0	\$160.00	\$20	0	1
Lamb, Dirk	10	10.0	\$240.00	\$24	0	1
Lapp, John	5	25.0	\$500.00	\$20	0	1
Lazar, Maureen	2	6.0	\$120.00	\$20	0	1
McKerny, Francis	2	4.0	\$77.00	\$19.3	0	1
Moesby, Betty	2	2.0	\$130.00	\$65	0	1
Nevada Health Care	13	20.0	\$1,552.10	\$77.6	0	3
Preece, Philip	4	16.0	\$1,040.00	\$65	0	1
Ruby, Millie	4	12.0	\$252.00	\$21	0	1
San Diego Health Care	4	14.0	\$1,070.00	\$76.4	0	2
Simpson, John	3	6.0	\$126.00	\$21	0	1
Soulie, Mary	7	14.0	\$1,260.00	\$90	0	1
Taylor, Ken	6	18.0	\$1,800.00	\$100	0	1
Vision Nursing Home	4	24.0	\$2,400.00	\$100	0	1
Zanders, Virginia	4	4.0	\$84.00	\$21	0	1
Zangoli, Toni	3	10.5	\$220.50	\$21	0	1

**Rate Source** 3

 (All)  
 Call Type Rate  
 Office Call Type Rate  
 Per Diem

Section	Explanation
<b>1. Call Type</b>	Can filter by Call Type (Service)
<b>2. Description</b>	Filter by Description (Regular, Overtime, Overtime Daily, Holiday, etc.)
<b>3. Rate Source</b>	Filter by Rate Source (Rate, Call Type Rate, Agency Rate, Per Diem, etc.)
<b>4. Summary</b>	Breakdown of the following: Total Number of Caregivers, Total Number of Billing Hours, Total Dollar Amount, Avg. Per Hour, Unique Clients, Unique Caregivers, Min Rate, Max Rate, Total Number of Overtime Hours, Total Dollar Amount for Overtime Hours.
<b>5. Totals by Clients</b>	Client Records displaying Total Number of Billing Records, Total Gross Hours, Total Gross Dollar Amount, Amount Per Hour, Total Number of Units (Mileage, Errand Mileage), and Total Number of Caregivers
<b>6. Totals by Payers</b>	Payer Records displaying Total Number of Billing Records, Total Gross Hours, Total Gross Dollar Amount, Amount Per Hour, Total Number of Units (Mileage, Errand Mileage), and Total Number of Clients

# Summary by Month By Client (e0003)

Load from Billing View Posted screen.

Layout Export

Summary by Month by Client - e0003

Call Type	Totals Hours by Client					
	2017			Grand Total		
	March					
	Hours	Amount	Per Hour	Hours	Amount	Per Hour
Aguirre, Madeleine	9.00	\$189.00	\$21	9.00	\$189.00	\$21
Atkins, Atty	20.00	\$940.00	\$47	20.00	\$940.00	\$47
Balser, Leigh D	60.00	\$2,100.00	\$35	60.00	\$2,100.00	\$35
Bellaire, Marcy	100.00	\$1,404.52	\$14	100.00	\$1,404.52	\$14
Briggs, John	10.00	\$250.00	\$25	10.00	\$250.00	\$25
Broderick, Betty	144.00	\$1,512.00	\$10.5	144.00	\$1,512.00	\$10.5
Cafferty, Jim	2.00	\$36.00	\$18	2.00	\$36.00	\$18
Egret, Bill	4.00	\$80.00	\$20	4.00	\$80.00	\$20
Farnsworth, Grace	6.00	\$150.00	\$25	6.00	\$150.00	\$25
Harpeti, Randy	4.00	\$40.00	\$10	4.00	\$40.00	\$10
Hunter, John	8.50	\$170.00	\$20	8.50	\$170.00	\$20
Jones, James	8.00	\$160.00	\$20	8.00	\$160.00	\$20
Jones, Wendy	12.00	\$1,200.00	\$100	12.00	\$1,200.00	\$100
Junor, Tammy	10.00	\$1,000.00	\$100	10.00	\$1,000.00	\$100
Lamb, Dirk	10.00	\$240.00	\$24	10.00	\$240.00	\$24
Lapp, John	25.00	\$500.00	\$20	25.00	\$500.00	\$20
Lazar, Maureen	6.00	\$120.00	\$20	6.00	\$120.00	\$20
Margett, Bill	4.00	\$320.00	\$80	4.00	\$320.00	\$80
Mccall, Timothy	3.00	\$300.00	\$100	3.00	\$300.00	\$100
McKenny, Francis	4.00	\$77.00	\$19.3	4.00	\$77.00	\$19.3
Moesby, Betty	2.00	\$130.00	\$65	2.00	\$130.00	\$65
Preece, Philip	16.00	\$1,040.00	\$65	16.00	\$1,040.00	\$65
Ruby, Millie	12.00	\$252.00	\$21	12.00	\$252.00	\$21
Saulnier, Leona	5.00	\$52.10	\$10.4	5.00	\$52.10	\$10.4
Simpson, John	6.00	\$126.00	\$21	6.00	\$126.00	\$21
Smith, Eddie	3.00	\$300.00	\$100	3.00	\$300.00	\$100
Soullie, Mary	14.00	\$1,260.00	\$90	14.00	\$1,260.00	\$90
Taylor, Ken	18.00	\$1,800.00	\$100	18.00	\$1,800.00	\$100
Vision Nursing H...	24.00	\$2,400.00	\$100	24.00	\$2,400.00	\$100
Wouch, Hugh	3.00	\$300.00	\$100	3.00	\$300.00	\$100
Zanders, Virginia	4.00	\$84.00	\$21	4.00	\$84.00	\$21
Zangoli, Toni	10.50	\$220.50	\$21	10.50	\$220.50	\$21
<b>Grand Total</b>	<b>567.00</b>	<b>\$18,753.12</b>	<b>\$33.1</b>	<b>567.00</b>	<b>\$18,753.12</b>	<b>\$33.1</b>

Rate Source
<input checked="" type="checkbox"/> (All)
<input checked="" type="checkbox"/> Call Type Rate
<input checked="" type="checkbox"/> Office Call Type Rate
<input checked="" type="checkbox"/> Per Diem

Section	Explanation
1. Call Type	Filter by Call Type (Service)
2. Regular Source	Filter by Rate Source (Rate, Call Type Rate, Agency Rate, Per Diem, etc.)
3. Total Hours by Client	Total Number of Billed Hours, Total Dollar Amount and Avg. Per Hour by Client, by Month/Year + a Grand Total

# Summary By Month By Payer (e0004)

Load from Billing View Posted screen.

Layout Export

## Summary by Month by Payer - e0004

Call Type	Totals Hours by Payer					
	2017			Grand Total		
	March					
	Hours	Amount	Per Hour	Hours	Amount	Per Hour
<input checked="" type="checkbox"/> (All)	9.00	\$189.00	\$21	9.00	\$189.00	\$21
<input checked="" type="checkbox"/> Caregiver 24 Hr Live In	4.00	\$92.00	\$23	4.00	\$92.00	\$23
<input checked="" type="checkbox"/> Homemaker Hourly	10.00	\$190.00	\$19	10.00	\$190.00	\$19
<input checked="" type="checkbox"/> PCA Hourly	60.00	\$2,100.00	\$35	60.00	\$2,100.00	\$35
<input checked="" type="checkbox"/> RN Hourly	96.00	\$1,312.52	\$13.7	96.00	\$1,312.52	\$13.7
	10.00	\$250.00	\$25	10.00	\$250.00	\$25
	144.00	\$1,512.00	\$10.5	144.00	\$1,512.00	\$10.5
	2.00	\$36.00	\$18	2.00	\$36.00	\$18
	16.00	\$1,600.00	\$100	16.00	\$1,600.00	\$100
	4.00	\$80.00	\$20	4.00	\$80.00	\$20
	6.00	\$150.00	\$25	6.00	\$150.00	\$25
	4.00	\$40.00	\$10	4.00	\$40.00	\$10
	8.50	\$170.00	\$20	8.50	\$170.00	\$20
	8.00	\$160.00	\$20	8.00	\$160.00	\$20
	10.00	\$240.00	\$24	10.00	\$240.00	\$24
	25.00	\$500.00	\$20	25.00	\$500.00	\$20
	6.00	\$120.00	\$20	6.00	\$120.00	\$20
	4.00	\$77.00	\$19.3	4.00	\$77.00	\$19.3
	2.00	\$130.00	\$65	2.00	\$130.00	\$65
	20.00	\$1,552.10	\$77.6	20.00	\$1,552.10	\$77.6
	16.00	\$1,040.00	\$65	16.00	\$1,040.00	\$65
	12.00	\$252.00	\$21	12.00	\$252.00	\$21
	14.00	\$1,070.00	\$76.4	14.00	\$1,070.00	\$76.4
	6.00	\$126.00	\$21	6.00	\$126.00	\$21
	14.00	\$1,260.00	\$90	14.00	\$1,260.00	\$90
	18.00	\$1,800.00	\$100	18.00	\$1,800.00	\$100
	24.00	\$2,400.00	\$100	24.00	\$2,400.00	\$100
	4.00	\$84.00	\$21	4.00	\$84.00	\$21
	10.50	\$220.50	\$21	10.50	\$220.50	\$21
<b>Grand Total</b>	<b>567.00</b>	<b>\$18,753.12</b>	<b>\$33.1</b>	<b>567.00</b>	<b>\$18,753.12</b>	<b>\$33.1</b>

Rate Source
<input checked="" type="checkbox"/> (All)
<input checked="" type="checkbox"/> Call Type Rate
<input checked="" type="checkbox"/> Office Call Type Rate
<input checked="" type="checkbox"/> Per Diem

Section	Explanation
1. Call Type	Filter by Call Type (Service)
2. Regular Source	Filter by Rate Source (Rate, Call Type Rate, Agency Rate, Per Diem, etc.)
3. Total Hours by Payer	Total Number of Billed Hours, Total Dollar Amount and Avg. Per Hour by Payer, by Month/Year + a Grand Total

# Billing By Rate (e0005)

Load from Billing View Posted screen .

Layout Export e0005 - Billing by Rate

**Regular Rate** 1

- (All)
- \$10.00
- \$18.00
- \$19.00
- \$19.25
- \$20.00
- \$21.00
- \$23.00
- \$24.00
- \$25.00
- \$35.00
- \$65.00
- \$75.00
- \$80.00
- \$90.00
- \$100.00
- \$250.00
- \$252.00

**Regular Rate** 2

Grand Total		
	Hours	Amount
▼ \$10.00 Total	4.00	\$50.00
Homemaker Hourly	4.00	\$40.00
PCA Hourly	0.00	\$10.00
▼ \$18.00 Total	2.00	\$36.00
Homemaker Hourly	2.00	\$36.00
▼ \$19.00 Total	10.00	\$190.00
Homemaker Hourly	10.00	\$190.00
▼ \$19.25 Total	4.00	\$77.00
Homemaker Hourly	4.00	\$77.00
▼ \$20.00 Total	51.50	\$1,030.00
Homemaker Hourly	18.00	\$360.00
PCA Hourly	33.50	\$670.00
▼ \$21.00 Total	41.50	\$871.50
Homemaker Hourly	23.50	\$493.50
PCA Hourly	18.00	\$378.00
▼ \$23.00 Total	4.00	\$92.00
Homemaker Hourly	4.00	\$92.00
▼ \$24.00 Total	20.00	\$480.00
PCA Hourly	20.00	\$480.00
▼ \$25.00 Total	6.00	\$150.00
PCA Hourly	6.00	\$150.00
▼ \$35.00 Total	60.00	\$2,100.00
PCA Hourly	60.00	\$2,100.00
▼ \$65.00 Total	18.00	\$1,170.00
PCA Hourly	16.00	\$1,040.00

**Regular By Client** 3

Client Name	Avg Rate	Hours	Amount
Aguirre, Madeleine	\$21.00	9.00	\$189.00
Atkins, Atty	\$35.00	20.00	\$940.00
Belser, Leigh D	\$35.00	60.00	\$2,100.00
Bellaire, Marcy	\$174.33	40.00	\$467.00
Briggs, John	\$21.20	10.00	\$250.00
Broderick, Betty	\$252.00	144.00	\$1,512.00
Cafferty, Jim	\$18.00	2.00	\$36.00
Egret, Bill	\$20.00	4.00	\$80.00
Farnsworth, Grace	\$25.00	6.00	\$150.00
Harpet, Randy	\$10.00	4.00	\$40.00
Hunter, John	\$20.00	8.50	\$170.00
Jones, James	\$20.00	8.00	\$160.00
Jones, Wendy	\$100.00	12.00	\$1,200.00
Junor, Tammy	\$100.00	10.00	\$1,000.00
Lamb, Dirk	\$24.00	10.00	\$240.00
Lapp, John	\$20.00	25.00	\$500.00
Lazar, Maureen	\$20.00	6.00	\$120.00
Margett, Bill	\$80.00	4.00	\$320.00
Mccall, Timothy	\$100.00	3.00	\$300.00
McKenny, Francis	\$19.25	4.00	\$77.00
Moesby, Betty	\$65.00	2.00	\$130.00
Preece, Philip	\$65.00	16.00	\$1,040.00
Ruby, Mille	\$21.00	12.00	\$252.00
Saulnier, Leona	\$250.00	5.00	\$52.10
Simpson, John	\$21.00	6.00	\$126.00
Smith, Eddie	\$100.00	3.00	\$300.00
Soulie, Mary	\$90.00	14.00	\$1,260.00

**Regular By Call Type** 4

Call Type	Avg Rate	Hours	Amount
Caregiver 24 Hr Live In	\$250.80	185.00	\$1,939.10
Homemaker Hourly	\$23.85	69.50	\$1,608.50
PCA Hourly	\$59.67	250.50	\$14,138.00
RN Hourly	\$65.00	2.00	\$130.00

**OT Rate** 5

- (All)
- \$0
- \$375

**Overtime Rate** 6

Grand Total		
	Hours	Amount
▼ \$0.00 Total	0.00	\$0.00
> Caregiver 24 Hr Live In	0.00	\$0.00
> Homemaker Hourly	0.00	\$0.00
> PCA Hourly	0.00	\$0.00
> RN Hourly	0.00	\$0.00
▼ \$375.00 Total	60.00	\$937.52
> Caregiver 24 Hr Live In	60.00	\$937.52
Grand Total	60.00	\$937.52

**Overtime by Client** 7

Client Name	Avg OT Rate	OT Hours	OT Amount
Bellaire, Marcy	\$375.00	60.00	\$937.52

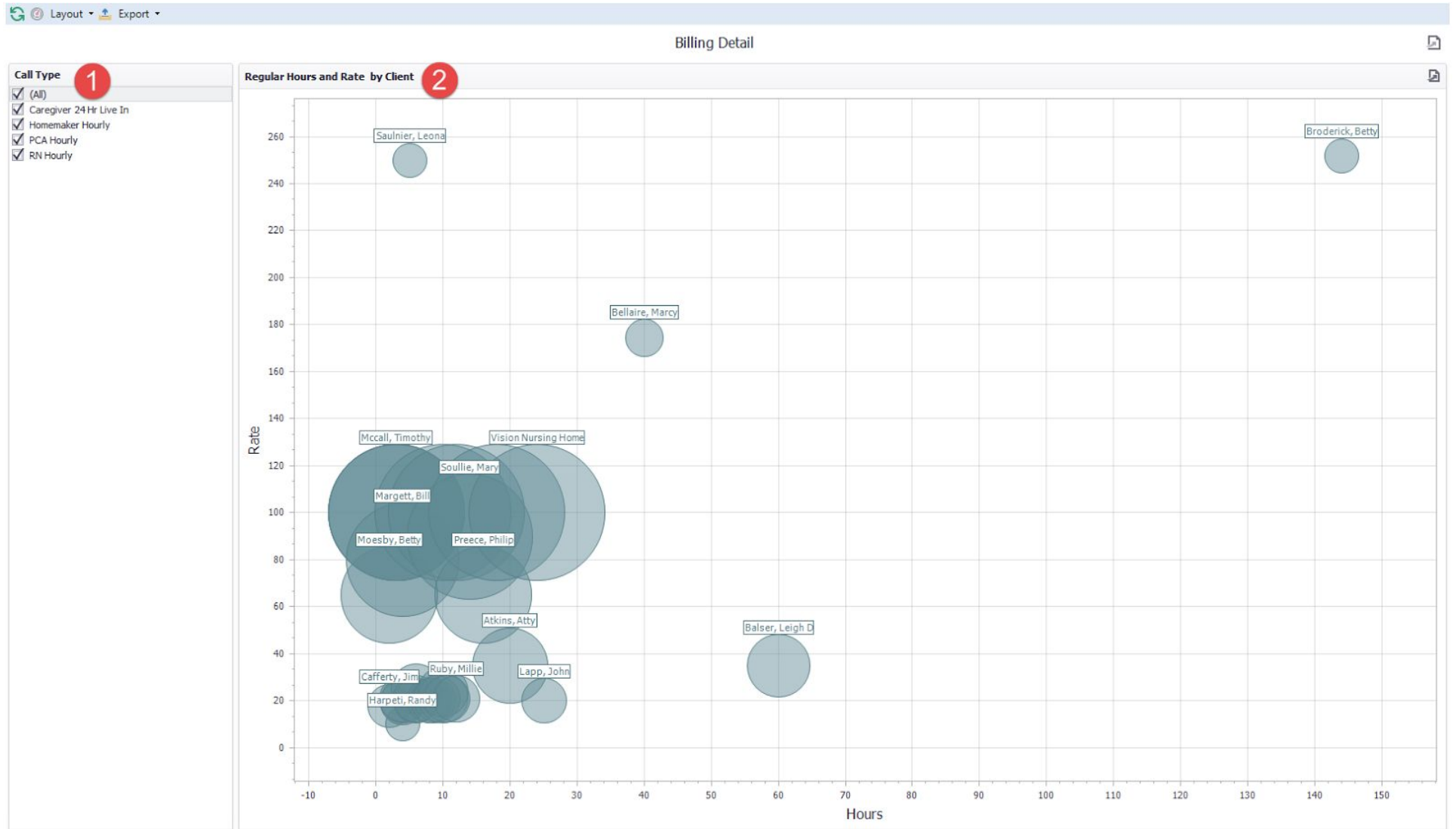
**Overtime by Call Type** 8

Call Type	OT Rate	OT Hours	OT Amount
Caregiver 24 Hr Live In	\$375.00	60.00	\$937.52

Section	Explanation
1. Regular Rate	Filter by Regular Rate
2. Regular Rate	Total Number of Billed Hours and Total Dollar Amount broken down by Call Type for each Regular Billing Rate
3. Regular Rate by Client	Breakdown of Regular Hours and Rates: Avg. Billing Rate, Total Number of Billed Hours, Total Dollar Amount by Client
4. Regular Rate by Call Type	Breakdown of Regular Hours and Rates: Avg. Billing Rate, Total Number of Billed Hours, Total Dollar Amount by Call Type.
5. OT Rate	Filter by Overtime Rate
6. Overtime Rate	Total Number of Billed Hours and Total Dollar Amount broken down by Call Type for each Overtime Billing Rate
7. Overtime by Client	Breakdown of Overtime Hours and Rates: Avg. Billing Rate, Total Number of Billed Hours, Total Dollar Amount by Client
8. Overtime by Call Type	Breakdown of Overtime Hours and Rates: Avg. Billing Rate, Total Number of Billed Hours, Total Dollar Amount by Call Type.

# Billing Scatter Chart (e0002)

Load from Billing View Posted screen.



Section	Explanation
1. Call Type	Can filter by Call Type (Service)
2. Regular Hours and Rate by Client	Visual display of Total Number of Regular Hours, Total Dollar Amount and Rate by Client



# Payroll Data Grid Dashboards

## Payroll Summary (f0001)

Load from Payroll View Posted screen.

Layout Export
Payroll Summary - f0001

**Call Type** 1

 (All)  
 Caregiver 24 Hr Live In  
 Homemaker Hourly  
 PCA Hourly  
 RN Hourly

**Summary** 4

Record Count	Hours (Reg,OT)	Amount (Reg,OT)	Avg Per Hour	Clients	Caregivers
128	485.33	\$4,341.54	\$8.95	32	31
Min Rate	Max Rate	OT Hours	OT Amount		
\$0.00	\$180.00	0.00	\$0.00		

**Description** 2

 (All)  
 Regular

**Totals by Caregiver** 5

Caregiver	Record Count	Hours (Reg,OT)	Amount (Reg,OT)	Per Hour	Units	Regular Hours	Regular Amount	Overtime Hours	Overtime Amount	Clients
Adams, Abby	4	64.0	\$720.00	\$11.3	0	64.0	\$720.00	0.0	\$0.00	1
Alba, Jael	2	2.0	\$36.00	\$18	0	2.0	\$36.00	0.0	\$0.00	1
Barnes, Melissa Linda	4	12.0	\$132.00	\$11	0	12.0	\$132.00	0.0	\$0.00	1
Bourne, Elizabeth Marisa	2	10.0	\$100.00	\$10	0	10.0	\$100.00	0.0	\$0.00	1
Brookins, Joanne	4	2.7	\$30.00	\$11.2	0	2.7	\$30.00	0.0	\$0.00	1
Captian, Les Paula	3	9.0	\$103.00	\$11.4	0	9.0	\$103.00	0.0	\$0.00	2
Dawson, Becky	5	5.0	\$50.00	\$10	0	5.0	\$50.00	0.0	\$0.00	2
Doli, Claudia Nicole	1	1.0	\$11.00	\$11	0	1.0	\$11.00	0.0	\$0.00	1
Durco, Shannon	4	16.0	\$160.00	\$10	0	16.0	\$160.00	0.0	\$0.00	2
Fluvus, Patty	4	7.0	\$73.50	\$10.5	0	7.0	\$73.50	0.0	\$0.00	2
Giffel, Lisa	20	44.0	\$462.02	\$10.5	0	44.0	\$462.02	0.0	\$0.00	3
H, Blake	5	25.0	\$300.00	\$12	0	25.0	\$300.00	0.0	\$0.00	1
Hemming, Amanda Christine	5	7.5	\$84.40	\$11.3	0	7.5	\$84.40	0.0	\$0.00	1
Henry, Morey	1	1.0	\$11.00	\$11	0	1.0	\$11.00	0.0	\$0.00	1
Jackson, Jean	3	6.0	\$66.00	\$11	0	6.0	\$66.00	0.0	\$0.00	1
James, Rick Kellie	2	6.0	\$60.00	\$10	0	6.0	\$60.00	0.0	\$0.00	1
Leckie, Beatrice Amber	3	3.0	\$37.86	\$12.6	0	3.0	\$37.86	0.0	\$0.00	1
McKenny, Brandon J	4	6.0	\$74.16	\$12.4	0	6.0	\$74.16	0.0	\$0.00	2
Meisel, Mark	2	8.0	\$96.00	\$12	0	8.0	\$96.00	0.0	\$0.00	1
Miller, Mary (Moyra)	4	4.0	\$42.00	\$10.5	0	4.0	\$42.00	0.0	\$0.00	1
Moray, Fred	7	23.5	\$235.00	\$10	0	23.5	\$235.00	0.0	\$0.00	3
Moris, Christal Ricky	5	10.0	\$116.50	\$11.7	0	10.0	\$116.50	0.0	\$0.00	1
Pearson, Jane	6	96.0	\$0.00	\$0	0	96.0	\$0.00	0.0	\$0.00	1
Petterson, Jillian	8	16.0	\$186.00	\$11.6	0	16.0	\$186.00	0.0	\$0.00	2
Ruiloba, Roland	1	0.7	\$7.50	\$11.2	0	0.7	\$7.50	0.0	\$0.00	1
Smit, June	7	22.0	\$269.50	\$12.3	0	22.0	\$269.50	0.0	\$0.00	2
Stevenson, Kevin	4	8.0	\$96.00	\$12	0	8.0	\$96.00	0.0	\$0.00	2
Sue W	3	6.0	\$61.50	\$10.3	0	6.0	\$61.50	0.0	\$0.00	1
Swile, Jeremiah	1	20.0	\$220.00	\$11	0	20.0	\$220.00	0.0	\$0.00	1
Taming, Sue	2	4.0	\$60.60	\$15.2	1	4.0	\$60.60	0.0	\$0.00	1

**Rate Source** 3

 (All)  
 Call Type Rate  
 Individual-Specific Rate  
 Office Call Type Rate  
 Per Diem  
 Rate

Section	Explanation
1. Call Type	Can filter by Call Type (Service)
2. Description	Filter by Description (Regular, Overtime, Overtime Daily, Holiday, etc.)
3. Rate Source	Filter by Rate Source (Rate, Call Type Rate, Agency Rate, Per Diem, etc.)
4. Summary	Breakdown of the following: Total Number of Records, Total Number of Payroll Hours (Reg., OT), Total Dollar Amount(Reg., OT), Avg. Per Hour, Total Number of Clients, Total Number of Caregivers, Min Rate, Max Rate, Total Number of Overtime Hours, Total Dollar Amount for Overtime Hours.
5. Totals by Caregiver	Caregiver Records displaying Total Number of Payroll Records, Total Number of Hours(Reg., OT), Total Dollar Amount(Reg., OT), Amount Per Hour, Total Number of Units (Mileage, Errand Mileage), Total Number of Regular Hours, Total Dollar Amount (Reg.), Total Number of Overtime Hours, Total Dollar Amount(OT) and Total Number of Clients

# Summary by Month (f0002)

Load from Payroll View Posted screen.

Layout Export

Summary by Month - f0002

Call Type	Totals by Caregiver												Grand Total		
	2017														
	January			February			March								
	Hours	Amount	Per Hour	Hours	Amount	Per Hour	Hours	Amount	Per Hour	Hours	Amount	Per Hour	Hours	Amount	Per Hour
Adams, Abby	288.00	\$3,240.00	\$11.25	259.50	\$2,922.00	\$11.26	96.00	\$1,080.00	\$11.25	643.50	\$7,242.00	\$11.25			
Alba, Jael	8.00	\$144.00	\$18.00	8.00	\$144.00	\$18.00	3.00	\$54.00	\$18.00	19.00	\$342.00	\$18.00			
Barnes, Melissa ...	27.00	\$297.00	\$11.00	48.00	\$528.00	\$11.00	18.00	\$198.00	\$11.00	93.00	\$1,023.00	\$11.00			
Bourne, Elizabet...	108.00	\$1,111.50	\$10.29	89.00	\$914.50	\$10.28	22.00	\$223.50	\$10.16	219.00	\$2,249.50	\$10.27			
Brookins, Joanne	12.00	\$135.00	\$11.25	10.67	\$120.00	\$11.25	4.00	\$45.00	\$11.25	26.67	\$300.00	\$11.25			
Captian, Les Paula	43.00	\$491.00	\$11.42	36.00	\$412.00	\$11.44	11.00	\$127.00	\$11.55	90.00	\$1,030.00	\$11.44			
Dawson, Becky	22.00	\$220.00	\$10.00	20.00	\$200.00	\$10.00	8.00	\$80.00	\$10.00	50.00	\$500.00	\$10.00			
Doll, Claudia Nicole	4.00	\$44.00	\$11.00	4.00	\$44.00	\$11.00	1.00	\$11.00	\$11.00	9.00	\$99.00	\$11.00			
Durco, Shannon	92.00	\$920.00	\$10.00	64.00	\$640.00	\$10.00	22.00	\$220.00	\$10.00	178.00	\$1,780.00	\$10.00			
Fluws, Patty	30.00	\$315.00	\$10.50	28.00	\$294.00	\$10.50	12.00	\$126.00	\$10.50	70.00	\$735.00	\$10.50			
Giffel, Lisa	193.50	\$2,031.84	\$10.50	176.00	\$1,848.00	\$10.50	68.50	\$719.28	\$10.50	438.00	\$4,599.20	\$10.50			
H, Blake	110.00	\$1,320.00	\$12.00	100.00	\$1,200.00	\$12.00	40.00	\$480.00	\$12.00	250.00	\$3,000.00	\$12.00			
Hemming, Aman...	33.00	\$371.36	\$11.25	30.00	\$337.60	\$11.25	12.00	\$135.04	\$11.25	75.00	\$844.00	\$11.25			
Henry, Morey							1.00	\$11.00	\$11.00	1.00	\$11.00	\$11.00			
Jackson, Jean	20.00	\$220.00	\$11.00	24.00	\$264.00	\$11.00	10.00	\$110.00	\$11.00	54.00	\$594.00	\$11.00			
James, Rick Kellie	27.00	\$270.00	\$10.00	24.00	\$240.00	\$10.00	9.00	\$90.00	\$10.00	60.00	\$600.00	\$10.00			
Leckie, Beatrice ...	12.00	\$151.44	\$12.62	12.00	\$151.44	\$12.62	5.00	\$63.10	\$12.62	29.00	\$365.98	\$12.62			
McKenny, Brand...	35.00	\$432.60	\$12.36	24.00	\$296.64	\$12.36	9.00	\$111.24	\$12.36	68.00	\$840.48	\$12.36			
Meisel, Mark	36.00	\$432.00	\$12.00	32.00	\$384.00	\$12.00	12.00	\$144.00	\$12.00	80.00	\$960.00	\$12.00			
Miller, Mary (Mo...	18.00	\$189.00	\$10.50	23.00	\$246.00	\$10.70	6.00	\$63.00	\$10.50	47.00	\$498.00	\$10.60			
Moray, Fred	96.50	\$965.00	\$10.00	94.00	\$940.00	\$10.00	40.50	\$405.00	\$10.00	231.00	\$2,310.00	\$10.00			
Moris, Christal Ri...	44.00	\$512.60	\$11.65	40.00	\$466.00	\$11.65	16.00	\$186.40	\$11.65	100.00	\$1,165.00	\$11.65			
Pearson, Jane	432.00	\$0.00	\$0.00	384.00	\$0.00	\$0.00	144.00	\$0.00	\$0.00	960.00	\$0.00	\$0.00			
Petterson, Jillian	70.00	\$814.00	\$11.63	64.00	\$744.00	\$11.63	24.00	\$280.00	\$11.67	158.00	\$1,838.00	\$11.63			
Rizzo, Milena	432.00	\$4,860.00	\$11.25							432.00	\$4,860.00	\$11.25			
Rulloba, Roland	2.67	\$30.00	\$11.25	2.67	\$30.00	\$11.25	1.33	\$15.00	\$11.25	6.67	\$75.00	\$11.25			
Smit, June	98.00	\$1,200.50	\$12.25	88.00	\$1,078.00	\$12.25	34.00	\$416.50	\$12.25	220.00	\$2,695.00	\$12.25			
Stevenson, Kevin	36.00	\$432.00	\$12.00	32.00	\$384.00	\$12.00	12.00	\$144.00	\$12.00	80.00	\$960.00	\$12.00			
Sue W	16.00	\$164.00	\$10.25	24.00	\$246.00	\$10.25	10.00	\$102.50	\$10.25	50.00	\$512.50	\$10.25			
Swile, Jeremiah	100.00	\$1,100.00	\$11.00	80.00	\$880.00	\$11.00	20.00	\$220.00	\$11.00	200.00	\$2,200.00	\$11.00			
Taming, Sue	20.00	\$303.00	\$15.15	16.00	\$242.40	\$15.15	4.00	\$60.60	\$15.15	40.00	\$606.00	\$15.15			
Thomas, Alfred	160.00	\$1,760.00	\$11.00	160.00	\$1,760.00	\$11.00	80.00	\$880.00	\$11.00	400.00	\$4,400.00	\$11.00			
Grand Total	2,625.67	\$24,476.84	\$9.32	1,996.83	\$17,956.66	\$8.99	755.33	\$6,801.16	\$9.00	5,377.83	\$49,234.66	\$9.16			

**Rules:** If *Monthly Hours* is:

Range	Color
>= 130	GREEN
100 to 129	YELLOW
50 to 99	BLUE

If *Grand Total* is >= 1560, *Name Column* is highlighted in GREEN

Section	Explanation
1. Call Type	Filter by Call Type (Service)
2. Rate Source	Filter by Rate Source (Rate, Call Type Rate, Agency Rate, Per Diem, etc.)
3. Totals by Caregiver	Total Number of Payroll Hours, Total Dollar Amount and Avg. Per Hour by Caregiver, by Month/Year + a Grand Total

# Payroll by Rates (f0003)

Load from Payroll View Posted screen.

Layout Export

f0003 - Payroll by Rate

**1 Regular Rate**

(All)  
 \$0.00  
 \$10.00  
 \$10.25  
 \$10.50  
 \$11.00  
 \$11.25  
 \$11.65  
 \$12.00  
 \$12.25  
 \$12.36  
 \$12.62  
 \$12.65  
 \$18.00  
 \$180.00

**2 Regular Rate**

Grand Total	Hours		Amount
	Hours	Amount	
\$0.00	960.00	\$0.00	
\$10.00	619.00	\$6,290.00	
\$10.25	50.00	\$512.50	
\$10.50	671.00	\$7,045.70	
\$11.00	865.00	\$9,515.00	
\$11.25	75.00	\$844.00	
\$11.65	100.00	\$1,165.00	
\$12.00	556.50	\$6,678.00	
\$12.25	220.00	\$2,695.00	
\$12.36	68.00	\$840.48	
\$12.62	29.00	\$365.98	
\$12.65	40.00	\$506.00	
\$18.00	19.00	\$342.00	
\$180.00	1,105.33	\$12,435.00	
<b>Grand Total</b>	<b>5,377.83</b>	<b>\$49,234.66</b>	

**3 Regular By Caregiver**

Caregiver Name	Avg Rate	Hours	Amount
Adams, Abby	\$175.90	643.50	\$7,242.00
Alba, Jael	\$18.00	19.00	\$342.00
Barnes, Melissa Linda	\$11.00	93.00	\$1,023.00
Bourne, Elizabeth Marisa	\$10.31	219.00	\$2,249.50
Brookins, Joanne	\$180.00	26.67	\$300.00
Captian, Les Paula	\$11.67	90.00	\$1,030.00
Dawson, Becky	\$10.00	50.00	\$500.00
Doll, Claudia Nicole	\$11.00	9.00	\$99.00
Durco, Shannon	\$10.00	178.00	\$1,780.00
Fluws, Patty	\$10.50	70.00	\$735.00
Giffel, Lisa	\$10.50	438.00	\$4,599.20
H, Blake	\$12.00	250.00	\$3,000.00
Hemming, Amanda Christine	\$11.25	75.00	\$844.00
Henry, Morey	\$11.00	1.00	\$11.00
Jackson, Jean	\$11.00	54.00	\$594.00
James, Rick Kellie	\$10.00	60.00	\$600.00
Ledkie, Beatrice AMber	\$12.62	29.00	\$365.98
McKenny, Brandon J	\$12.36	68.00	\$840.48
Meisel, Mark	\$12.00	80.00	\$960.00
Miller, Mary (Moyra)	\$10.54	47.00	\$498.00
Moray, Fred	\$10.00	231.00	\$2,310.00
Moris, Christal Ricky	\$11.65	100.00	\$1,165.00
Pearson, Jane	\$0.00	960.00	\$0.00
Petterson, Jillian	\$11.63	158.00	\$1,838.00

**4 Regular By Call Type**

Call Type	Avg Rate	Hours	Amount
Caregiver 24 Hr Live In	\$118.98	2,065.33	\$12,435.00
Homemaker Hourly	\$11.19	828.90	\$9,139.98
PCA Hourly	\$10.96	2,465.00	\$27,317.68
RN Hourly	\$18.00	19.00	\$342.00

**5 OT Rate**

(All)  
 \$0

**6 Overtime Rate**

Grand Total	Hours		Amount
Hours	Amount		
\$0.00	0.00	\$0.00	
<b>Grand Total</b>	<b>0.00</b>	<b>\$0.00</b>	

**7 Overtime By Caregiver**

Caregiver Name	Avg OT Rate	OT Hours	OT Amount
----------------	-------------	----------	-----------

**8 Overtime By Call Type**

Call Type	Avg OT Rate	OT Hours	OT Amount
-----------	-------------	----------	-----------

Section	Explanation
<b>1. Regular Rate Filter</b>	Filter by Regular Rates
<b>2. Regular Rate</b>	Total Number of Payroll Hours, Total Dollar Amount by Rate, by Call Type
<b>3. Regular Rate by Caregiver</b>	Total Number of Avg. Rate, Total Number of Hours and Total Dollar Amount by Caregiver
<b>4. Regular Rate by Call Type</b>	Total Number of Avg. Rate, Total Number of Hours and Total Dollar Amount by Call Type
<b>5. OT Rate Filter</b>	Filter by Overtime Rates
<b>6. Overtime Rate</b>	Total Number of Payroll Hours, Total Dollar Amount by Rate, by Call Type
<b>7. Overtime By Caregiver</b>	Total Number of Avg. Rate, Total Number of Hours and Total Dollar Amount by Caregiver
<b>8. Overtime by Call Type</b>	Total Number of Avg. Rate, Total Number of Hours and Total Dollar Amount by Call Type

# Days Worked By Caregiver (f0004)

Load from Payroll View Posted screen.

Layout Export

## Days Worked by Caregiver - f0004

(All) **1**

Caregiver 24 Hr Live In

Homemaker Hourly

PCA Hourly

RN Hourly

(All) **2**

Regular

(All) **3**

Call Type Rate

Individual-Specific Rate

Office Call Type Rate

Per Diem

Rate

**Payroll Records** **4**

Caregiver	Days Worked	Total Hours	Total Amount
Adams, Abby	4.00	64.00	\$720.00
Alba, Jael	2.00	2.00	\$36.00
Barnes, Melissa Linda	4.00	12.00	\$132.00
Bourne, Elizabeth Marisa	2.00	10.00	\$100.00
Brookins, Joanne	4.00	2.67	\$30.00
Captian, Les Paula	3.00	9.00	\$103.00
Dawson, Becky	3.00	5.00	\$50.00
Doll, Claudia Nicole	1.00	1.00	\$11.00
Durco, Shannon	4.00	16.00	\$160.00
Fluws, Patty	3.00	7.00	\$73.50
Giffel, Lisa	6.00	44.00	\$462.02
H, Blake	5.00	25.00	\$300.00
Hemming, Amanda Christine	5.00	7.50	\$84.40
Henry, Morey	1.00	1.00	\$11.00
Jackson, Jean	3.00	6.00	\$66.00
James, Rick Kellie	2.00	6.00	\$60.00
Leckie, Beatrice Amber	3.00	3.00	\$37.86
McKenny, Brandon J	3.00	6.00	\$74.16
Meisel, Mark	2.00	8.00	\$96.00
Miller, Mary (Moyra)	4.00	4.00	\$42.00
Moray, Fred	3.00	23.50	\$235.00
Moris, Christal Ricky	5.00	10.00	\$116.50
Pearson, Jane	6.00	96.00	\$0.00
Pettersen, Milian	6.00	16.00	\$186.00
Ruiloba, Roland	1.00	0.67	\$7.50
Smit, June	5.00	22.00	\$269.50
Stevenson, Kevin	4.00	8.00	\$96.00
Sue W	3.00	6.00	\$61.50
Swile, Jeremiah	1.00	20.00	\$220.00
Taming, Sue	1.00	4.00	\$60.60
Thomas, Alfred	2.00	40.00	\$440.00

Section	Explanation
1. Call Type Filter	Filter by Call Type
2. Rate Type	Filter by Rate Type (Regular, Overtime)
3. Rate Source	Filter by Rate Source (Rate, Call Type Rate, Agency Rate, Per Diem, etc.)
4. Payroll Records	Total Number of Days Worked, Total Number of Hours, and Total Dollar Amount by Caregiver