

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' . \, 🏠

Status Added by Referra Status Added by Referra Layout •	al Source										
						Stat	us A	dded by Refe	rral Source -	h0005	
Filter By	Current Status										
						1 August					
O Caregiver	4	Active	Aug Actio	Dave	Months	Assessed		Aug Active Dave	Months		
Olient	- April 2017 Total	Count	AVG ACU	102.0	monuns	3		Avg Active Days	Months		
) Office Staff	Duck Donald		1	102.0		3					
	- March 2017 Total		1	131.0		4					
itus Type	Page James		1	131.0		4					
(AII)	- December 2016 T		2	237.0		8					
Active	Simpson John		1	237.0		8					
Archived	Smith Eddie		1	237.0		8					
Deceased	- November 2016 T		2	272.0		9					
Inactive	Egret Bil		1	272.0		9					
Potential	Earnsworth, 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					
Lategory	By Referral Source										
(All)	- 5		Active				1	Assessed			
Houriv			Count	Av	g Active Days	Months	0	Count	Avg Active Days	Months	
Medicaid	+ Total			4	406	5	13				
Office	Balser, Leigh D			1	670	0	22				
Office Manager	Duck, Donald			1	103	2	3				
Owner	Smith, John			1	370)	12				
Salar Perron	Wouch, Hugh			1	480)	16				
Scheduler	+ 760 AM KFMB Talk Ra	adio Total		2	534	9	18	1			
SouthEast	Bellaire, Marcy			1	62	2	20				
SouthWest	Hunter, John			1	44	5	15				
Unspecified	Youngblood, Gary							1			
		ital		5	453	3	15				
	Atkins, Atty			1	790	5	26				
	Lapp, John			1	350)	12				
	Ruby, Millie			1	43	5	14				
	Caudadan Lanan						4.0				

Section	Explanation
1. Filter By:	Client
2. Status Type:	Set status type to Potential, Assessed, Active or Archived
3. Current Status:	This section will display the following:
	Client are display by their current status within the Month/Year.
	Explain the month to see the clients
	Number of clients within each status
	Average Days Active
	Number of Months Active
4. By Referral Source	This section will display the following:
	Organizations are display by the Client's current status
	Explain the Organization to see the clients
	 Number of Active Clients by Referral Source (Organization)
	Average Days Active
	Number of Months Active

Quick Snapshot (h0015)

Load dashboard from under 'Home' . 🛛 🏠

Topic: Oui	ck Sna	epshot			Start:	Jan 01, 2017	End: Jul	31.2017	• D	solav												
avout • •	Evnor	•••			and I				Canal Community	adina farmanda												
ayour	capos	•																				
								-		Quick S	napShot - h00	15	•									
s I	A	Status Added	3)			Ø	Current Totals	(4)			D	Clien	t Referrals			R	Docum	ented Events				
-	3		Caregiver	Client				Caregiver	Client				-	Count Total				-	Grand Total			
		Active			3		Active		35	38		> Do	ortor		1				Count	Hours		
		Application Rece		4			Archived		26	17							▶ Gone	to hospital		1	0.00	
		Assessed			1		Assessed		1	2							▹ Sick			1	0.00	
		Closed			1		Deceased		2	2							Grand T	otal		2	0.00	
	2	Hire Date		4			Inactive		18	7												
2	1	Inactive			1		Potential		4													
9		Interviewed		4																		
		Potential		2	1																	
<																						
-		-												_								
0		Total 9			Summary by Call Type			(Call Type 13)						Summary by Caregiver 15			🔄 🐂 Summary by Client 16					
vailable		Count	Sch Hours	Act Hours		Name	-		Count	1	Hours		Name		Count	Hours		Name		Count	Hours	
		4,195	18,37	75.25	7,321.50	Caregiver 24 Hr L	ve In			481	8,0	71.00			2	6	379.00 *	Aguirre, Madeleine		1	20	3
-						Homemaker Hour	Y			1.11K	2,5	35.00	Adams, Abby		1	2	2,907.50	Atkins, Atty		2	12	6
8						Package Deal PCA Hourly RN Hourly				21		21.00	Alba, Jael			0	60.00	Balser, Leigh D			91	1,8
giver z mir Li	ive :	Schodulod			D					2.49K	7,5	92.25	Barnes, Melissa Linda		1	4	449.00	Bellaire, Marcy		1	81	3,0
emaker Hourl	ly	Scheduled			2					60		60.00	Bourne, Elizabeth Marisa		1	8	450.50	Briggs, John		1	17	2
age Deal		Caregivers		Clients		Service Place Hol	ler			24		24.00	Brookins, Joanne		1	1	121.00	Broderick, Betty		1	32	4,3
Houriy			35		37	Vacation				3		72.00	Captian, Les Paula			2	275.00	Cafferty, Jim			54	
ice Place Hold	der												Dawson, Becky		1	1	153.00	Cook, Beth			47	
tion													Durco, Shannon			16	444.00	Ecret Bill			13 64	4
		No Caregiver	11		A	Count by Start	ime 14					DA TH	Flowe Datty		1	1	212.00	Earneworth Grace		-	14	1
		Count			-		-					-	Giffel Lisa		6	4	1.328.75	Harneti, Randy			29	1
		Count	106	A45	249.00	2K							H. Blake		1	1	755.00	HomeTrak Training - HH Cor			3	
			120		240.00	1.54							Hemming, Amanda Christine		1	9	193.50	Hunter, John		2	80	3
						1.5K							Henry, Morey			1	1.00	Jones, James			60	2
		-				11							Jackson, Jean			8	176.00	Jones, Wendy		1	52	3
		Cancelled 12			D	IN							James, Rick Kellie			0	180.00	Junor, Tammy		;	51	3
		Count	H	N.FS		0.5K							Leckie, Beatrice AMber			0	90.00	Lamb, Dirk		3	02	3
		worth	104	A# 0	172 50	-					100 Aug.		McKenny, Brandon J		1	.4	179.00	Lapp, John		1	51	7
			10-4		172.30	ок			_				Meisel, Mark			0	240.00	Lazar, Maureen			60	18

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
Schedule Section – bottom port	tion of dashboard
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.

Average Days in Sta	tus Summary	2														
Active 3	tive Archived Assessed 392.33 560.00		Assessed	Closed 64.69 380.67			First Contact	First Contact In 4.00		ment 2.33	Potential 38.15		Start of Care 395.00			
Datail bu Barran																
Detail by Person		Archived			1		a 1	End Control of			1				0.1.50	
3	Acuve Data in Status	Dave Retween Status	Archived	Dave Retween Status	Assessed	Dave Returnen Statu	Dave in Statue	Dave Returnen Statu	Pirst Contact	Dave Retween Statu	In Home Asses	Dave Behugen Status	Potential Dave in Statue	Dave Baturan Statu	Dave in Statue	
h Bradford Biapra	Days In Status	Days between status	612	Days between status	a bays in status	Days between Status	Days In Status	Days between Status	o bays in Status	Days between statu	s Days in Status	Days between status	Days in Status	Days between Status	s bays in status	-
 Brickey, Linda 		J	467	50)									0		
 Broderick, Betty 	501	2	2			2 2								2		
 Calloway, Susan 			566	35	5	5							3	5		
 Chesterman, Fran 			580	8	3									8		
Cook, Beth	476	20)		2	0 1	i l							1		
+ Egret, Bill	307	188	3										18	8		
 Farnsworth, Grace 	307	169)										16	9		
Harpeti, Randy	459	9)		0	9 9	2							9		
+ Hunter, John	480	2	2			2 6	5							6		
 Jones, Wendy 	453	30)		1	8 5	5 2	2 84	;					5		
▹ Jordon, Sean			547	27	7								2	7		
 Junor, Tammy 	455	14	1		1	4 ε	8							8		
 LaFave, George 			595	33	3											
- Lass Asks	10									A		a a	1		10	
Average by Month 600 900 200 200 200 500 200 500 200 500 200 500 200 500 5	4						7	7		August — In Hom — Start o	ie Assessment: 4. f Care: 385.00	.00				

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

Scheduling Dashboards

Schedulers

Schedule Overview (h0001)



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

Schedules - Summary (h0002)

Topic: Schedules - Su	mmary *	Start: Jan 01, 2017 End: Jul 3:	, 2017	Display												
🔒 🕐 Layout 🔹 🚣 Export 🔹																
					Summary	- h0002								Ē		
✓ (Al)	Schedule Summary	Schedule Details by Caregiver	1				Schedule Details By Week of the Year									
Z Linévailable		Caregiver	Count	Hours	s Can	celled Hrs Clients		Year, Week	Count	V	Cancelled Hrs	caregivers	Clients			
S. CONTRACT	Count			285	248.00	131.00	9 .	2017, 31		31 1	54.25	0.00	23	24 -		
		Adams, Abby		122	2,907.50	0.00	2	2017, 30		144 5	89.00	0.00	31	32		
	4,195	Alba, Jael		60	60.00	0.00	1	2017, 29		138 5	75.00	0.00	31	32		
		Barnes, Melissa Linda		164	422.00	27.00	2	2017, 28		135 5	65.50	0.00	29	32		
Z (AI)		Bourne, Elizabeth Marisa		118	442.00	8.50	3	2017, 27		135 5	65.50	0.00	29	32		
Caregiver Live In	Hours	Brookins, Joanne		121	121.00	0.00	1	2017, 26		130 5	60.50	0.00	29	32		
Homemaker Hourly		Captian, Les Paula		92	273.00	2.00	4	2017, 25		135 5	72.50	0.00	31	33		
Package Deal PCA Housely	18,204.75	Dawson, Becky		151	153.00	0.00	3	2017, 24		141 5	86.00	0.00	31	33		
RN Hourly		Doll, Claudia Nicole		31	31.00	0.00	2	2017, 23		141 5	86.00	0.00	31	33		
Service Place Holder	Consult different	Durco, Shannon		126	444.00	0.00	3	2017, 22		139 6	07.00	0.00	33	34		
Vacation	Canceled Hours	Fluws, Patty		121	212.00	0.00	2	2017, 21		136 5	82.00	0.00	31	33		
		Giffel, Lisa		604	1,328.75	0.00	3	2017, 20		135 5	73.00	7.00	31	33		
	170.50	H, Blake		151	755.00	0.00	1	2017, 19		135 5	80.00	0.00	31	33		
		Hernming, Amanda Christine		129	193.50	0.00	1 *	2017, 18		136 5	81.00	0.00	31	33 -		
	No Caregiver	Schedule Details by Client	Schedule Details by Client								Schedule Details by Call Type					
		Client	Count	Hours	Cancelle	ed Hrs Caregivers		Call Type	a	Hou	rs Cancel	led Hrs Caregivers	Client	ts		
	286	Aguirre, Madeleine		120	345.00	15.00	4 -	Caregiver 24 Hr Live In		481	8,071.00	0.00	5			
	200	Atkins, Atty		212	596.00	7.00	4	Homemaker Hourly		1,113	2,423.50	111.50	14	1		
		Balser, Leigh D		91	1,820.00	0.00	2	Package Deal		21	21.00	0.00	1			
	Caregivers	Bellaire, Marcy		181	3,024.00	0.00	2	PCA Hourly		2,493	7,533.25	59.00	23	1		
		Briggs, John		117	294.00	0.00	2	RN Hourly		60	60.00	0.00	1			
	35	Broderick, Betty		182	4,368.00	0.00	1	Service Place Holder		24	24.00	0.00	2			
		Cafferty, Jim		64	53.00	26.00	2	Vacation		3	72.00	0.00	2			
		Cook, Beth		47	11.00	54.00	1									
	Clients	Duck, Donald		43	86.00	0.00	1									
		Egret, Bil		64	121.00	2.00	2									
	37	Farnsworth, Grace		114	204.00	0.00	3									
		Harpeti, Randy		29	116.00	0.00	1									
		HomeTrak Training - HH Corp		3	72.00	0.00	2 *									

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

Cancelled Schedules (h0011)

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. Client	Can filter by Client Name
4. Schedules	Total Number of Cancelled Schedules for the date range.
5. Hours	Total Number of Cancelled Scheduled Hours for the date range.
6. Average	Average Number of Cancelled Scheduled Hours per Schedule (Hours / Schedules)
7. Circle Graphs	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
8. Hours by Day Graph	Total Number of Cancelled Scheduled Hours by Day
9. Client Summary –Percent by Hours	Total Number Cancelled Schedules, Hours and Percentage by Client
10. Hours by Day of the Week Graph	Total Number of Cancelled Scheduled Hours by Day of the Week
11. Hours by Time of Day Graph	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' . \Lambda



Sect	tion	Explanation
1.	Call Type Status	Can filter by Call Type Status Active or Unavailable
2.	Schedule Status	Can filter by Schedule Status
3.	Call Type - Count Call Type - Hours	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.
4.	Scheduled Hours by Selected Call Types (graph)	Visual display of Total Number of Scheduled Hours by Active and Unavailable Call Types.
5.	By Call Type and Client	Total Number of schedules and scheduled hours by Call type by client
6.	By Call Type and Caregiver	Total Number of schedules and scheduled hours by Call type by caregiver

Schedules – Day of Week and Times (h0003)



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



Se	ction	Explanation
1.	Entity	Can filter by Entity (All, Client, Caregiver, and Office Staff). Choose filter by Documented Event Categories
2.	Total Events Entered by Week of Year	Visual display shows the Total Number of Documented Event Categories entered by Week of Year.
3.	Total Hours Entered by Week of Year	Visual display shows the Total Number of Hours for each Documented Event category by Week of Year.
4.	Documented Events by Person	Total Number of Documented Events and Hours in each Categories by Person.
5.	Documented Events – By Type	Total Number of Events and Hours in each Documented Categories. Percentage breakdown by category.
6.	Summary by Week of Year	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)



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

Operation 1 Summary by Person/Company 2 2 3 Operation 1 0.00 0.00 % 6 In Adam, Abby Total 1 0.00 0.00 % 6 In Adam, Abby Total 1 0.00 0.00 % 6 In Adam, Abby Total 1 0.00 0.00 % 6 In Adam, Abby Total 1 0.00 0.00 % 6 In Adam, Abby Total 1 0.00 0.00 % 6 In Adam, Abby Total 1 0.00 0.00 % 6 In Adam, Abby Total 1 0.00 0.00 % 6 In Adam, Abby Total 1 0.00 0.00 % 6 In Decked Streadule 1 0.00 0.00 % 6 In Decked Streadule 1 0.00 0.00 % 6 In Beterd Streadule 1 0.00 0.00 % 6 In Edeck Streadule 1 0.00 0.00 % 6 In Edeck Streadule 1 0.00 0.00 % 6 In Edeck Streadule 1 0.00 % 1	Processor Summary by Person/compare Summary by Person/comp	Summary by Person (come Q Description Description <thdescription< th=""> Description</thdescription<>						Summary	by Category - i000)3					
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Se	ction	Explanation
1.	Category	Can filter by Documented Events Categories.
2.	Summary by Person/Company	Grouped by Entity then Category, shows Total Number of Events, Total Number of Hours, Percentage and Ranking
3.	Summary by Category	Total Number of Events in each Category, Total Number of Hours per Category, Percentage and Ranking.
4.	Count by Category	Visual display of Total Number of Events per Category.
5.	Hours by Category	Visual display of Total Number of Hours per Category.
6.	Hours by Start Time	Visual display of Total Hours of Events by Start Time.
7.	Hours by Day	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 Date	s by Person -	i0007								Ũ
(AI) 1	Expired Dates by Perso	ipired Dates by Person. 3														
Mandatory Ontional		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	
oponia	Adams, Abby			Expired		Expired	Expired			OK						
	Alba, Jael			Expired	Expired	Expired	Expired		Expired	Expired						
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	Brookins, Joanne	Expired	Expired				Expired	Expired								
scription	Captian, Les Paula					Expired	Expired	OK	Expired	OK						
(AI)	Casillas, William	Expired														
Activity of Daily Living Assessment	Clarke, Frank						Expired		Expired							
agency Orientation	Dawson, Becky					Expired	Expired	OK	Expired	OK						
Aids Training Althoimer's and Memory Care	Doll, Claudia Nicole					Expired	Expired	OK	Expired	OK						
Background/Police Check	Durco, Shannon						Expired	Expired	Expired	OK			Expired			
ar Insurance	Fluws, Patty					Expired	Expired	Expired	Expired	OK						0
PR Certificate	Giffel, Lisa					Expired	Expired	OK	Expired	OK	O	<				
rivers License	Hemming, Amanda Christ					Expired	Expired	OK		OK						
irst Aid Certificate	Jackson, Jean	[OK			Expired	Expired	OK		OK	O	<				
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rinciples of Caregiving	Jones, George					Expired	Expired		Expired						ок	C
N License	Leckie, Beatrice AMber		OK			Expired		OK		OK	O	ĸ				
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	Miller, Mary (Moyra)							Expired		OK						
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	Pearson, Jane		OK			Expired	Expired	OK	Expired	OK		OF	<			
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	Taming, Sue		OK			Expired	Expired	OK	Expired	Expired		0	c			(
	Thompson, Catherine			Expired		Expired	Expired									

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

Se	ction	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.



Se	ction	Explanation
1.	Call Type	Can filter by Call Types (Services).
2.	Scheduled Hours by Day (graph)	Visual display of Total Number of Scheduled Hours by Day.
3.	Scheduled Hours by Day (table)	Table listing Each Day and the Total Number of Hours.
4.	Scheduled Hours by Day (graph)	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.



Se	ction	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 Ty	/ре	Can filter by Call Types (Services).
2. Summ	ary (graph)	Visual display of Total Number of Scheduled Hours by the Month.
3. Schedu	uled Hours	Table listing Each Month/Year and the Total Number of Scheduled Hours for the month.
4. Line G	raph	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.

scheduled Hours: 857.75 Actual Hours: 858.85 Billing Hours: 859.25 Payroll Hours: 858.81 Actual : 0.40 Payroll - Actual: 0.40 Patterne: 0	ur Summary Scheduled Hours: Actual Hours: Billing Hours: Payroll Hours:	857.75 858.85 859.25	By Call Type 2		By Schedule Status	D	By Schedule Date 5			Į
Scheduled Hours: 857.75 Actual Hours: 858.85 Billing Hours: 859.25 Payroll Hours: 858.81 Actual - Scheduled: 1.10 Billing - Actual: 0.40 Payroll - Actual: 0.04 tours by Bill and Pay Type 4 Description Both Payroll and Billing 222 857.75 Both Payroll and Billing 222 857.75 Both Payroll and Billing 222 857.75 Billing or Payroll +/- 15 Hinutes of Actual 7 Event B Schedule Date 1 5 06/13/2015 Dresc, Philip 0.79 10 06/21/2015 Preece, Philip 0.79 10 06/21/2015 Preec	Scheduled Hours: Actual Hours: Billing Hours: Payroll Hours:	857.75 858.85 859.25					120			
Actual: 1.10 Billing - Actual: 0.40 Payroll - Actual: -0.04 Both Payroll and Biling 222 Both Payroll and Biling 22 Both Payroll and Biling 22 Both Payroll and Biling 22 Both Payroll and Biling 23 Both Payroll and Biling 24 Both Payroll and Biling 24 Both Payroll and Biling 24 Both Payroll and Biling 24 <td>Astual Cabaduladu</td> <td>858.81</td> <td></td> <td></td> <td>0</td> <td></td> <td>100 80 60</td> <td>li –</td> <td></td> <td></td>	Astual Cabaduladu	858.81			0		100 80 60	li –		
Payroll - Actual: -0.04 Description Count Hours Both Payroll and Billing 222 857.75 0 <t< th=""><td>Billing - Actual:</td><td>0.40</td><td>Hours by Bill and P</td><td>Рау Туре 4</td><td></td><td></td><td>40</td><td></td><td></td><td></td></t<>	Billing - Actual:	0.40	Hours by Bill and P	Рау Туре 4			40			
Both Payroll and Biling 222 857.75 20 0 </th <td>Payroll - Actual:</td> <td>-0.04</td> <td>Description</td> <td>Count</td> <td>Hours</td> <td></td> <td></td> <td></td> <td></td> <td></td>	Payroll - Actual:	-0.04	Description	Count	Hours					
Billing or Payroll +/- 15 Hinutes of Actual Telling or			boot ray of and binny	9		037.73	0 06/12/2016	06/19/2016	06/26/2016	
Date Glent Hours Event ID Schedule Date Client Caregiver Bling Payroll 55 06/13/2016 Jones, Wendy 0.49 7455 06/13/2016 Jones, Wendy Flues, Patty -0.49 -0.49 06 06/13/2016 Presce, Philip 0.70 7859 06/24/2016 Usion Nursing Home Durco, Shannon 1.00 0 06/24/2016 Usion Nursing Home 0.49 -0.49	tual +/- 15 Minutes of Scheduled	6	D	Billing or Payroll +/- 15	Minutes of Actual					Į
55 06/13/2016 Jones, Wendy 0.49 76455 06/13/2016 Jones, Wendy Fluws, Patty -0.49 16 06/13/2016 Prece, Philip 0.70 75599 06/24/2016 Vision Nursing Home Durce, Shannon 1.00 10 06/24/2016 Vision Nursing Home Durce, Shannon 1.00	Date Clier	nt	Hours	Event ID	Schedule Date	Client	t	Caregiver	Billing Payrol	
66 06/13/2016 Preece, Philip 0.70 78589 06/24/2016 Vision Nursing Home Durco, Shannon 1.00 11 06/21/2016 Preece, Philip 0.50 1.00	55 06/13/2016 Jon	ies, Wendy	0.49	76455	06/13/2016	Jones	s, Wendy	Fluws, Patty	-0.49	0.
11 06/21/2016 Prece, Philip 0,50 06/21/2016 Union Jaropia Moment 100	06 06/13/2016 Pree	ece, Philip	0.70	78589	06/24/2016	Vision	Nursing Home	Durco, Shannon	1.00	0.
No. 06/24/2016 Vielon Nureion Home -1.00	11 06/21/2016 Pres	ece, Philip	0.50							
	89 06/24/2016 Visio	on Nursing Home	-1.00							

******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'.

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

Summary of Hours (d0005)

Load from Schedule Review screen

ut • 📥 Export •												
			Summary of H	ours - do	005						Ð	
Hour Summary 2		B	Schedule Hours By Call	Type 🖻	Scheduled Hour	s By Date 4					ß	
Total Ho	ours: 5	89.00		3	120							
No. Course		12			120				_			
No Careg	iver:	12			90							
No Caregiver Ho	ours:	14.00										
Cance	liea:	0			60	_						
Cancelled Ho	ours:	0.00			-							
Caregi	/ers:	31			30			_	-			
Clie	ents:	32										
					0							
					08/20/20:	17	08/22/2017	08/24/201	7	08	8/26/2017	
Hours by Caregiver 5		25	Hours by Client			D .	Hours by Call Type	7				
Caregiver	Total Actual	Pay	Client	Total	Actual	Bill	Call Type	Total	Actual	Pay	Bill	
	14.00	0.00 *	Aguirre, Madeleine		12.00	0.00 🔶	Caregiver 24 Hr Live In	245.00		0.	00.00	
Adams, Abby	96.00	0.00	Atkins, Atty		20.00	0.00	Homemaker Hourly	79.50		0.0	00.00	
Alba, Jael	2.00	0.00	Balser, Leigh D		60.00	0.00	Package Deal	5.00		0.	00.00	
Barnes, Melissa Linda	18.00	0.00	Bellaire, Marcy		100.00	0.00	PCA Hourly	254.50		0.0	00.00	
Bourne, Elizabeth Marisa	15.00	0.00	Briggs, John		10.00	0.00	RN Hourly	2.00		0.	00.00	
Brookins, Joanne	4.00	0.00	Broderick, Betty		144.00	0.00	Service Place Holder	3.00		0.	00.00	
Captian, Les Paula	9.00	0.00	Duck, Donald		6.00	0.00						
Dawson, Becky	5.00	0.00	Egret, Bill		4.00	0.00						
Doll, Claudia Nicole	1.00	0.00	Farnsworth, Grace		9.00	0.00						
Durco, Shannon	16.00	0.00	Harpeti, Randy		4.00	0.00						
Fluws, Patty	7.00	0.00	Hunter, John		12.50	0.00						
Giffel, Lisa	44.00	0.00	Jones, James		8.00	0.00						
H, Blake	25.00	0.00	Jones, Wendy		12.00	0.00						
Hemming, Amanda Christine	7.50	0.00	Junor, Tammy		10.00	0.00						
Jackson, Jean	6.00	0.00	Lamb, Dirk		10.00	0.00						
James, Rick Kellie	6.00	0.00	Lapp, John		25.00	0.00						
Leckie, Beatrice AMber	3.00	0.00	Lazar, Maureen		6.00	0.00						
McKenny, Brandon J	4.00	0.00	Margett, Bill		4.00	0.00						
Meisel, Mark	8.00	0.00	Mccall, Timothy		3.00	0.00						
Miller, Mary (Moyra)	4.00	0.00	McKenny, Francis		4.00	0.00						
Moray, Fred	23.50	0.00	Moesby, Betty		2.00	0.00						
Moris, Christal Ricky	10.00	0.00	Preece, Philip		16.00	0.00						
Pearson, Jane	144.00	0.00	Ruby, Millie		12.00	0.00						
Petterson, Jillian	16.00	0.00	Saulnier, Leona		5.00	0.00						
Ruiloba, Roland	1.00	0.00	Simpson, John		6.00	0.00						
Smit, June	22.00	0.00 -	Smith, Eddie		6.00	0.00 *						

<u>Rules:</u> If *Total* or *Payroll Hours* are:

Range	<u>Color</u>
>= 40	RED
35 to 39	YELLOW

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

Se	ection	Explanation
1.	Schedule Status	Can filter by Schedule Status.
2.	Hours Summary	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
3.	Schedule Hours by Call Type	Visual display of Total Number of Scheduled Hours by Call Type.
4.	Scheduled Hours by Date	Visual display of Total Number of Schedules Hours by Date.
5.	Hours by Caregiver	Total Number of Scheduled Hours, Total Number of Actual Hours, and Total Number of Hours to be Paid by Caregiver.
6.	Hours by Client	Total Number of Scheduled Hours, Total Number of Actual Hours, and Total Number of Hours to be Billed by Client.
7.	Hours by Call Type (Services)	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

-

Start: Jan 01, 2017

End: Jan 31, 2017

Display

Owner/Management

Billing Versus Payroll

Load dashboard from under 'Home . 🦄

Topic: Billing Versus Payroll

🕄 🕘 Layout 📲 Export 🔹

Billing Information		1 2	Absolute Differen	ice between Billing	and Payroll by C	lient 🚺	Ð	Billing By Payer	5			Ð	Top 20 Clients		6 🛛			
Hours:	2.855.00			Grand Total		-			arand Total					Profit Total	U			
Amount:	\$79.699.31			Billed Hours	Payed Hours	Absolute Difference			Hours 4	Amount	Profit		Renolds, Debbie	\$11,745.03	÷			
*Profit:	\$50,696.71		Renolds, Debbie	648.00	432.00	0 216.00	*	Aguirre, Madeleine	36.00	\$756.00	\$216.00	-	Balser, Leigh D	\$11,040.00				
Unique Clients:	34		Broderick, Betty	576.00	384.0	0 192.00	1	Associates Insurance	16.00	\$368.00	\$56.00	1	Vision Nursing Home	\$10,668.00				
Avg Per Client:	\$2,344.10		Bellaire, Marcy	400.00	272.0	0 128.00		Atkins, Atty	40.00	\$760.00	(\$20.00)		Taylor, Ken	\$7,735.08				
Avg Per Hour:	\$27.92		Saulnier, Leona	10.00	6.6	7 3.33		Balser, Leigh D	240.00	\$8,400.00	\$5,580.00		Bellaire, Marcy	\$5,440.00				
* Profit Per Client:	\$1,491.08		Farnsworth, Grace	10.00	10.00	0.00		Bellaire, Marcy	384.00	\$5,250.08	\$2,130.08		Broderick, Betty	\$6,048.00				
Profit Per Hour:	\$17.70		Jones, Wendy	47.00	47.0	0.00		Briggs, John	32.00	\$768.00	\$221.60		Soulie, Mary	\$5,490.00				
			Markle, Mary	56.00	56.00	0.00		Broderick, Betty	576.00	\$6,048.00	\$5,688.00		Jones, Wendy	\$5,205.00				
			Aguirre, Madeleine	36.00	36.00	0.00		Cafferty, Jim	8.00	\$144.00	(\$74.88)		Preece, Philip	\$4,832.00				
			Egret, Bill	16.00	16.00	0.00		Care Plus	44.00	\$4,400.00	\$3,415.00		Atkins, Atty	\$4,640.00	U			
Payroll Information		A b	Balser, Leigh D	240.00	240.00	0.00		Egret, Bil	16.00	\$320.00	\$8.00		Lapp, John	\$3,200.00				
Payroll Information		(2) 😕	Ruby, Milie	24.00	24.00	0.00		Farnsworth, Grace	10.00	\$250.00	\$65.00		Markle, Mary	\$3,108.00				
Hours:	2,315.67		Moesby, Betty	4.00	4.00	0.00		Harpeti, Randy	8.00	\$0.00	(\$110.00)		Junor, Tammy	\$2,233.00				
Amount:	Amount: \$21,472.60 Caregivers: 31 Caregivers: \$935.57 g Per Hour: \$12.5		Smith, Eddie	6.00	6.0	0.00		Hunter, John	50.00	\$1,000.00	(\$137.60)		Margett, Bill	\$2,031.92				
Unique Caregivers:			Simpson, John	12.00	12.00	0.00		Jones, James	16.00	\$304.00	\$52.00			¢1 537.60	*			
Avg Per Caregiver:			Jones, James	16.00	16.00	0.00		Lamb, Dirk	40.00	\$960.00	(\$60.00)		Bottom 20 Clients					
Avg Per Hour:			Harpeti, Randy	8.00	8.0	0.00		Lapp, John	100.00	\$2,000.00	\$500.00		*0	rofit Total				
							Lazar, Maureen	12.00	12.00	0.00		Lazar, Maureen	12.00	\$240.00	\$60.00		Harneti Randy	\$80.00
			Junor, Tammy	20.00	20.00	0.00		Markle, Mary	56.00	\$2,520.00	\$1,692.00		Saulnier, Leona	\$179.20	1			
		-	Lapp, John	100.00	100.00	0.00		McKenny, Francis	16.00	\$308.00	(\$4.00)		Cafferty, Jim	\$242.88				
*Profit by Call Type		2 3	Taylor, Ken	70.00	70.00	0.00		Moesby, Betty	4.00	\$260.00	\$128.00		Moeshy, Betty	\$332.00				
4016 E			Vision Nursing Home	96.00	96.00	0.00		Nevada Health Care	63.00	\$5,404.20	\$4,223.48		Farnsworth, Grace	\$360.00				
40K -			Zangoli, Toni	42.00	42.0	0.00		Preece, Philip	64.00	\$4,160.00	\$3,248.00		Lazar, Maureen	\$360.00				
204			Hunter, John	50.00	50.0	0.00		Renolds, Debbie	648.00	\$6,885.03	\$1,620.03		Simpson, John	\$384.00				
304			Atkins, Atty	80.00	80.00	0.00		Ruby, Milie	24.00	\$504.00	\$120.00		lones, lames	\$496.00				
20K			Lamb, Dirk	40.00	40.00	0.00		San Diego Health Care	62.00	\$4,760.00	\$3,803.08		McKenny, Francis	\$500.00				
LUN			Briggs, John	32.00	32.0	0.00		Simpson, John	12.00	\$252.00	\$30.00		Zanders, Virginia	\$504.00				
10К			McKenny, Francis	16.00	16.00	0.00	U	Soullie, Mary	54.00	\$4,850.00	\$3,825.00		Egret, Bil	\$512.00	5			
			Cafferty, Jim	8.00	8.0	0.00		Taylor, Ken	70.00	\$7,000.00	\$5,919.92		Smith, Eddie	e \$675.72				
ок		10 10 10 10 10 10 10 10 10 10 10 10 10 1	Margett, Bill	22.00	22.0	0.00		Vision Nursing Home	96.00	\$9,600.00	\$8,292.00	0	Ruby, Milie	\$768.00				
Homemak	er Hourly	RN Hourly	Zanders, Virginia	16.00	16.00	0.00		Zanders, Virginia	16.00	\$336.00	(\$72.00)		Aquirre, Madeleine	\$1.116.00				
Caregiver 24 Hr Live In	PCA Hour	1y	Wourh. Hunh	12.00	12.0	0.00	*	Zannoli. Toni	42.00	\$882.00	\$282.00	-		#1 124 40	*			

D

Se	ction	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	Total Billing Hours, Payroll Hours and Absolute Difference per Client
	and Payroll by 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'.

📆 My Calendar 📑 Client Inquiries 🛛	🐻 Schedules - No Caregiver [Schedule Dashboards (Preview)	Management Dashb	ooards (Preview)	Documented Events Da	ishboard (Preview)			8,
Topic: Payroll and Billing - Su	mmary -	Start: Jan 01, 2017	End: Jan 07, 201	7 • Displ	ay				
😋 🕜 Layout 🔹 📩 Export 🔹									
					Payroll and Billi	ng - h0006			D
Payroll Hours (Reg,OT) Payroll Amount (Reg,OT) Hours Per Caregiver: Amount Per Caregiver:	555.00 \$5,093.90 25.23 \$231.54		Payroll Hours (Reg,0T)	2		Billed Hours (Reg,OT) Billed Amount (Reg,OT) \$1 Hours Per Client: Amount Per Client:	684.00 (8,945.65 28.50 \$789.40	Billed Hours (R	²⁰⁰¹ 5 2
Average Per Hour: Caregivers:	9.18 22		Payroll Amount (Reg,0	n <mark>3</mark>	2	Average Per Hour: Clients:	\$27.70 24	Billed Amount (Reg.01) 6
Payroll Records - No Expenses					ß	Billing Records - No Expenses			2 2 2
Carediver	Hours (Reg.OT)	Amount (Reg.OT)	Regular	Overtime		Clients	Hours (Reg.OT)	Amount (Reg	on
Adams, Abby	river (is give i)	64.00	\$720.00	\$720.00	\$0.00 +	Aquirre, Madeleine		9.00	\$189.00 +
Bourne, Elizabeth Marisa		24.00	\$247.00	\$247.00	\$0.00	Atkins, Atty		20.00	\$940.00
Captian, Les Paula		9.00	\$103.00	\$103.00	\$0.00	Balser, Leigh D		60.00	\$2,100.00
Dawson, Becky		5.00	\$50.00	\$50.00	\$0.00	Bellaire, Marcy		100.00	\$1,404.52
Doll, Claudia Nicole		1.00	\$11.00	\$11.00	\$0.00	Briggs, John		8.00	\$192.00
Durco, Shannon		21.00	\$210.00	\$210.00	\$0.00	Broderick, Betty		144.00	\$1,512.00
Fluws, Patty		7.00	\$73.50	\$73.50	\$0.00	Cafferty, Jim		2.00	\$36.00
Giffel, Lisa		44.00	\$462.02	\$462.02	\$0.00	Egret, Bill		4.00	\$80.00
H, Blake		25.00	\$300.00	\$300.00	\$0.00	Hunter, John		12.50	\$250.00
Hemming, Amanda Christine		7.50	\$84.40	\$84.40	\$0.00	Jones, Wendy		12.00	\$1,200.00
McKenny, Brandon J		8.00	\$98.88	\$98.88	\$0.00	Lamb, Dirk		10.00	\$240.00
Miller, Mary (Moyra)		4.00	\$42.00	\$42.00	\$0.00	Lapp, John		25.00	\$500.00
Moray, Fred		19.50	\$195.00	\$195.00	\$0.00	Margett, Bill		6.00	\$480.00
Pearson, Jane		96.00	\$0.00	\$0.00	\$0.00	Markle, Mary		14.00	\$630.00
Petterson, illian		10.00	\$120.00	\$120.00	\$0.00	Mccall, Timothy		3.00	\$300.00
								5.00	450005
Rizzo, Milena		112.00	\$1,260.00	\$1,260.00	\$0.00	McKenny, Francis		4.00	\$77.00
Rizzo, Miena Smit, June		112.00	\$1,260.00	\$1,260.00	\$0.00	McKenny, Francis Preece, Philip		4.00	\$77.00

Se	ction	Explanation
1.	Payroll Information	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
2.	Payroll Hours (Reg., OT)	Total Payroll Hours Month/Year.
3.	Payroll Amount (Reg., OT)	Total Payroll Dollar Amount by Month/Year.
4.	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
5.	Billing Hours (Reg., OT)	Total Billing Hours Month/Year.
6.	Billing Amount (Reg., OT)	Total Billing Dollar Amount by Month/Year.
7.	Payroll Records – No Expenses	Total Hours (Reg., OT) and Dollar Amount (Reg., OT), Regular Dollar Amount and Overtime Dollar Amount with No Expenses by Caregiver
8.	Billing Records – No Expenses	Total Hours (Reg., OT) and Dollar Amount (Reg., OT) with No Expenses by Client

Billing Summary (h0017)				
Load dashboard from under 'Home'.	<u>^</u>			
Topic: Billing Summary S	tart: Jan 01, 2017 • End: Feb 28, 2017 • Disp	ay		
S @ Lavout - 1 Evnort -				
G G Gjott E ciper				
		Billing - h0017		5
Billed Hours (Reg, OT) 5,178.50	Billing Records - No Expenses			D
Billed Amount (Reg,OT) \$157,309.29	Summary			D
Hours Per Client: 152.31	Clients	Hours (Reg.OT)	Amount (Reg.OT)	
	Aguirre, Madeleine		75.00	\$1,575.00 +
Amount Per Client: \$4,626.74	Atkins, Atty		160.00	\$7,520.00
Average Per Hour: \$30.38	Balser, Leigh D		480.00	\$16,800.00
Clienter 24	Bellaire, Marcy		800.00	\$11,236.16
clients. 54	Briggs, John		72.00	\$1,808.00
	Broderick, Betty		1,152.00	\$12,095.00
	Cafferty, Jim		16.00	\$288.00
	Egret, Bill		32.00	\$640.00
	Farnsworth, Grace		34.00	\$850.00
	Harpeti, Randy		24.00	\$288.00
	Hunter, John		80.00	\$1,600.00
	Jones, James		48.00	\$944.00
	Jones, Wendy		50.00	\$9,500.00
	Junor, Tammy		80.00	\$6,000.00
Billed Hours (Rep.OT)			200.00	\$1,520.00
	Lazar, Maureen		36.00	\$720.00
	Margett, Bil		38.00	\$3,040.00
	Markle, 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
Billed Amount (Bas OT)	Ruby, Mille		72.00	\$1,512.00
Blied Amount (Reg,01)	Saulnier, 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

Se	ction	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)

🖞 My Calendar 📑 Client Inquiries 👘 Schedules - No Caregiver 🛗 Schedule Dashboard	ds (Preview) Management Dashboards (Preview)	Documented Events Dashboard (Preview)			8								
Topic: Payroll Summary • Start: Jan 01	, 2017 • End: Feb 28, 2017 • Dist	play											
🖉 Layout 🔹 🚣 Export 🔹													
		Payroll - h0018			Ē								
Payroll Hours (Reg, OT) 4,312.50	Payroll Records - No Expenses	Payroll Records - No Expenses											
Payroll Amount (Reg,OT) \$39,389.26	Summary	Summary											
Hours Per Caregiver: 139.11	Caregiver	Hours (Reg,OT)	Amount (Reg,OT)	Regular C	Overtime								
Amount Por Carogivor: \$1,270,62	Adams, Abby	515.5	0 \$5,802.00	\$5,802.00	\$0.00								
Allount Fel Calegiver. \$1,270.02	Alba, Jael	12.0	0 \$216.00	\$215.00	\$0.00								
Average Per Hour: 9.13	Barnes, Melissa Linda	72.0	0 \$792.00	\$792.00	\$0.00								
Caregivers: 31	Bourne, Elizabeth Marisa	185.0	0 \$1,902.50	\$1,902.50	\$0.00								
curegivers. 51	Brookins, Joanne	16.0	\$180.00	\$180.00	\$0.00								
	Captian, Les Paula	72.0	9 \$824.00	\$824.00	\$0.00								
	Dawson, Becky	40.0	9 \$400.00	\$400.00	\$0.00								
	Doll, Claudia Nicole	7.0	\$77.00	\$77.00	\$0.00								
	Durco, Shannon	146.0	0 \$1,460.00	\$1,460.00	\$0.00								
	Fluws, Patty	56.0	0 \$ 588.00	\$588.00	\$0.00								
	Gittel, Lisa	350.0	0 \$3,675.16	\$3,675.16	\$0.00								
	H, Blake	200.0	0 \$2,400.00	\$2,400.00	\$0.00								
	Hemming, Amanda Christine	60.0	0 \$675.20	\$575.20	\$0.00								
	Jackson, Jean	36.0	\$396.00	\$395.00	\$0.00								
aveal Hours (Rep 01)	James, Rick Kelle	36.0	0 \$360.00	\$360.00	\$0.00								
	Aza Leoke, Bearrice Amber	18.0	\$227,10	\$227.16	\$0.00								
	Model Made	54.0	0 \$007.44 6536.00	\$507.44	\$0.00								
	Miler Mark (Meuro)	15.0	576.00	\$576.00	\$0.00								
	Maray Ered	190.0	5 \$114.00 61 800.00	\$1,800,00	\$0.00								
	Morie Christal Richy	100.0	5 \$1,500.00	\$1,505.00	\$0.00								
	Dearoon Jane	768.0	5 \$0,000 \$0,000	\$0.00	\$0.00								
	Petterson Man	114.0	0 \$1,334,00	\$1,334,00	\$0.00								
	Rizzo Miena	432.0	5 \$1,554.00 0 \$4,860.00	\$4,850.00	\$0.00								
	- Ruloba Roland	4.0	0 \$45.00	\$45.00	\$0.00								
ayroll Amount (Reg,OT)	Smit. lune	176.0	\$2,156.00	\$2,156.00	\$0.00								
	Stevenson, Kevin	64.0	0 \$768.00	\$768.00	\$0.00								
	Sue W	40.0	\$410.00	\$410.00	\$0.00								
	Swile, Jeremiah	160.0	0 \$1,750.00	\$1,750.00	\$0.00								
	Taming, Sue	32.0	0 \$404.80	\$404.80	\$0.00								
	Thomas Alfred	200.0	42 E20 00	62 500 00	t0 00								

Se	ction	Explanation
1.	Payroll Information	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
2.	Payroll Hours (Reg., OT)	Total Payroll Hours Month/Year.
3.	Payroll Amount (Reg., OT)	Total Payroll Dollar Amount by Month/Year.
4.	Payroll Records – No Expenses	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'. 🏠



Se	ction	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'.

📅 My Calendar 📴 Clie	ent Inquiries 👘 Schedules	No Caregiver	Management D	ashboards (Preview	w)										
Topic: First an	d Last Day Scheduled	-					Display								
😋 🕐 Layout 🔹 🚣 Exp	oort 🔻														
							First and	Last Day Schedule -	h0004						Ē
Filter by	Status Added by	Month		Ø	Count by Status	4 2									
🗉 (AI)		9	Active	Archived	Assessed	Deceased	Inactive		Current Status	rirst Date	▼ Last Date	Person		Status	Count
Caregiver	- May, 2017	White, Betty						1	Active	01/16/2017	07/21/2017	Moesby, Betty		Active	3
- M Client	 April, 2017 	Duck, Donald		1					Active	01/16/2017	07/21/2017	Junor, Tammy		Archived	1
V Private	- March, 2017	Dean, James		1					Active	01/03/2017	07/20/2017	Egret, Bill		Assessed	
SouthEast		Markle, Mary						1	Active	01/02/2017	07/21/2017	Balser, Leigh D	0	Deceased	
SouthWest	- December, 2016	Simpson, John		1					Active	08/16/2016	07/21/2017	Lapp, John		Inactive	
☑ Unspecified		Smith, Eddle		1					Active	05/18/2016	07/22/2017	Jones, Wendy			
Office Staff	+ November, 2016	Egret, Bill		1					Active	05/13/2016	07/21/2017	Hunter, John			
		Farnsworth, Grace	1	1					Active	04/22/2016	07/21/2017	Broderick, Betty	*		
	▹ September, 2016			1					🗙 🗹 [Current Statu	is] = 'Active'					
10 8 6 4 2 0 May,	3 2015 July, 20	15 54	eptember, 2015	November,	2015	2 January, 2016	1 1 March, 20	2 2 16 May, 201	6 July,	2016 Septemb	er, 2016 Novemb	I rr, 2016 January, 2017	<u> </u>	March, 2017	May, 2017
Last Schedule Date															2
20														/	
	1]		1					1		I	
July,	2015 September	, 2015 N	ovember, 2015	January, 2	2016	March, 2016	May, 201	6 July, 201	6 Septemb	per, 2016 Novemb	er, 2016 January	2017 March, 2017		May, 2017	July, 2017

Se	ction	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'.

T : 01 MU																	
Topic: Status Added by	Keterral Source					Display											
🕐 Layout 🔹 📤 Export 🔹																	
						Status Added b	by Referral Se	ource - h0005	5								
ter By	Current Status																
(AII)	4	Active			Archived			Assessed			Deceased			Inactive			
Caregiver		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	
Client	+ May, 2017														1 15.0)	
Office Staff	+ April, 2017		1 104.0	D	3												
	+ March, 2017		1 133.0	D	4												
us Type	 December, 2016 		2 239.0	D	8												
Al)	November, 2016		2 274.0	D	9										1 125.0)	
(ctive	+ August, 2016		1 352.0	D	12												
archived Accessed	→ July, 2016		1 372.0	D	12												
Deceased	+ June, 2016		2 424.0	D	14												
nactive	▶ May, 2016		7 440.0	D	14												
otential	 April, 2016 		2 475.0	D	16												
	▶ March, 2016		1 510.0	D	17												
	 February, 2016 		1 534.0	D	18												
	▶ January, 2016		1 573.0	D	19										1 21.0)	
	k December 2015		2 595.	5	20												
		4															
egory	By Referral Source																
All)		Active			Archived			Assessed				Deceased			Inactive		
Contractor		Count	Avg Active Davs	Months	Count	Avg Active Davs	Months	Count	Avg Active Davs	Months	Count	Avg Active Davs	Months	Count	Avg Active Days	Months	
lourly	E.		4 40	в	13	1					1.237.087				3 48.7	7	
edicaid	▶ 760 AM KFMB Talk Radio		2 53	5	18	1			1						1 301	L	
Office Manager	Better HealthCare		5 45	5	15										1 125	5	
lwner	+ Care Plus					1											
Private	Church of Christ		2 37	1	12												
Sales Person	▶ Client Referral		4 59	D	19	1											
cheduler outbEast	 Coronado Hospital 		1 53	4	18	1											
outhWest	 Doctors Hospital 		2 27	В	9												
inspecified	 Elizabeth Lafkas Workers 					1											
	► Harvey Simmons MD		1 42	5	14												
	+ Hope Baptist Church		1 72	3	24												
	Mercy Health Center		1 66	7	22												
	Mercy Hospital and Medical Center		2 62	5	21	2											
	 Miami Hosnital 	-													1 94	+	

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

B my calendar E Client inquiries 10 Schedu	ines - No caregiver	agement	Dashboards (Prev	ew)							₽ ×
Topic: Benchmark	-	Start:	Jan 01, 2017	End: Jan 31, 2017	Display						
🔓 🕜 Layout 🔹 🚣 Export 👻											
					1	Benchmark - h0008					D
Billing And Payroll		۵	Details						5	Billing by Payer Source 5	D
Revenue:	Revenue: \$92,610,61		•		Average	Count	Revenue by Payer Source	Revenue by Service	Total		
nevenue.	<i>JJZ,010.01</i>		+ Billing	Billed Amount					92,610.61		
Billed Hours:	3,209.00			Billed Hours					3,209.00		
Paid Hours:	2,625.67			Hourly Billing Rate	49.85						Insurance
				Live-in (24.00 hrs) Billing Rate	252.59		C 000 04				
				.Government Agency			6,929.29				
				.Insurance			72,812,37				-Government Agency
Caregiver Information		Da		Careciver 24 Hr Live In			72,012.37	19,824.61			
2		-		Homemaker Hourly				10,414.00			
New:	0			PCA Hourly				61,852.00			
Terminated:	0			RN Hourly				520.00		Disusta David	
Cabadulad	24		+ Caregivers	New		0.00				[Private Pay]	
Scheduled:	31			Scheduled		31.00					
				Terminated		0.00					
			+ Clients	Assessments		0.00					
A				Inquiries		0.00					
Client Information				Length of Service	535.00					Billing By Service	Ð
Inquries:	0			New		0.00					
inquires.	0			Referrals		0.00					
New:	0			Stopped Service		0.00				Homemaker Hourk	
Assessment:	0		- Pavrol	Hourly Payroll Pate	11.08	0.00				rionenakerriosity	
Stopped Convice:	0		+ runoi	Live-in (24.00 hrs) Payroll rate	113.35						Caregiver 24 Hr Live In
stopped service.	0			Paid Hours					2,625.67		
Scheduled:	34										
Referrals:	0										RN Hourly
Ave Longth of Sonvice:	525										
Avg Length of Service.	222										
										PCA Houriy	

Se	ction	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	illing: 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							
		Caregivers: Total Number of Caregivers, Total Number of Caregivers Scheduled and Total Number Terminated.							
		Clients: 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.							
		Payroll: Avg. Hourly Payroll Rate, Avg. Live-in 24 hr Payroll Rate, and Total Number of Hours Paid.							
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'. 🏠

<u>Prerequisite:</u> 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.

Ġ 🕐 Layout 🔹 📤 Expor	t •															
					В	illing Su	mmary - e0	001								D
Call Type	Summary 4	Summary 4														
Caregiver 24 Hr Live In Homemaker Hourly PCA Hourly RN Hourly	Caregiver (Count)	Total H	Total Hours 567.00 OT Hours 60.00		stal Amount \$18,753.12		Avg Per	Hour \$33.07	Unique Clients 32		Unique Caregivers 31		Min Rate \$10.0		10.00	
	Max Rate \$252.0	ОТ Но. 0			T Amount \$937	7.52										
	Totals by Client						D	Totals by Payer	6							ø
	Client Record Co	unt Gross Hou	s Gross Am	ount i	Per Hour Units	Care	givers	Payer	Record Count	Gross Hours	Gross A	mount	Per Hour	Units	Clients	
Description	Aguirre, Madeleine	3	9.0	\$189.00	\$21	0	1 _	Aguirre, Madeleine		3	9.0	\$189.00		\$21	0	1
	Atkins, Atty	7	20.0	\$940.00	\$47	0	2	Associates Insurance		2	4.0	\$92.00		\$23	0	1
V Overtime Daily	Balser, Leigh D	3	100.0	\$2,100.00	\$35	0	2	Ations, Atty		5	10.0	\$190.00		\$19 *25	0	1
🗸 Regular	Brings John	6	10.0	\$1,404.52	\$14	1	2	Balaira Marcy		4	96.0	\$2,100.00	¢1	3 7	0	1
	Broderick Betty	5	144.0	\$1 512.00	\$10.5	0	- 1	Briggs, John		5	10.0	\$250.00	41	\$25	1	1
	Cafferty, Jim	2	2.0	\$36.00	\$18	0	1	Broderick, Betty		6	144.0	\$1,512.00	\$1	0.5	0	1
	Egret, Bill	2	4.0	\$80.00	\$20	0	1	Cafferty, Jim		2	2.0	\$36.00		\$18	0	1
	Farnsworth, Grace	3	6.0	\$150.00	\$25	0	1	Care Plus		11	16.0	\$1,600.00	\$	100	0	3
	Harpeti, Randy	1	4.0	\$40.00	\$10	0	1	Egret, Bill		2	4.0	\$80.00		\$20	0	1
	Hunter, John	6	8.5	\$170.00	\$20	0	2	Farnsworth, Grace		3	6.0	\$150.00		\$25	0	1
	Jones, James	2	8.0	\$160.00	\$20	0	1	Harpeti, Randy		1	4.0	\$40.00		\$10	0	1
	Jones, Wendy	5	12.0	\$1,200.00	\$100	0	3	Hunter, John		6	8.5	\$170.00		\$20	0	1
	Junor, Tammy	5	10.0	\$1,000.00	\$100	0	1	Jones, James		2	8.0	\$160.00		\$20	0	1
	Lamb, Dirk	10	10.0	\$240.00	\$24	0	1	Lamb, Dirk		10	10.0	\$240.00		\$24	0	1
Data Causar	Lapp, John	5	25.0	\$500.00	\$20	0	1	Lapp, John		5	25.0	\$500.00		\$20	0	1
Kate Source	Lazar, Maureen	2	6.0	\$120.00	\$20	0	1	Lazar, Maureen		2	6.0	\$120.00		\$20	0	1
(All)	Margett, Bill	2	4.0	\$320.00	\$80	0	1	McKenny, Francis		2	4.0	\$77.00	\$1	9.3	0	1
Office Call Type Rate	Mccall, Timothy	3	3.0	\$300.00	\$100	0	2	Moesby, Betty		2	2.0	\$130.00		\$65	0	1
Per Diem	McKenny, Francis	2	4.0	\$77.00	\$19.3	0	1	Nevada Health Care		13	20.0	\$1,552.10	\$7	7.6	0	3
	Moesby, Betty	2	2.0	\$130.00	\$65	0	1	Preece, Philip		4	16.0	\$1,040.00		\$65	0	1
	Preece, Philip	4	16.0	\$1,040.00	\$65	0	1	Ruby, Millie		4	12.0	\$252.00	1	\$21	0	1
	Ruby, Mille	4	12.0	\$252.00	\$21	0	1	San Diego Health Care		4	14.0	\$1,070.00	\$/	6.4	0	2
	Saunier, Leona	5	5.0	\$52.10	\$10.4	0	2	Simpson, John		3	6.0	\$126.00		\$21	0	1
	Smith Eddia	3	8.0	\$120.00	\$21	0	1	Taylor Kap		6	19.0	\$1,200.00		100	0	1
	Soulio Mary	7	14.0	\$1,760,00	\$100	0	10	Vision Nursing Home		0	24.0	\$1,000.00	\$	100	0	1
	Taylor Ken	5	18.0	\$1,200.00	\$90	0	2	Zanders Virginia		4	4.0	\$2,400.00	\$	\$21	0	1
	Vision Nursing Home	4	24.0	\$2,400.00	\$100	0	2	Zangoli, Toni		3	10.5	\$220.50		121	0	1
	Wouch klugh	2	2.0	\$200.00	\$100	0	-	and goay room			10.0	4220.00				-

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 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.
5. Totals by Clients	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
6. Totals by Payers	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 🔹

Call Type	Totals Hours by (Client 🛛					
(All)		- 2017			Construct		
Caregiver 24 Hr Live In		March			Grand Total		
		Hours	Amount	Per Hour	Hours	Amount	Per Hour
RN Hourly	Aguirre, Madeleine	9.00	\$189.00	\$21	9.00	\$189.00	\$21
	Atkins, Atty	20.00	\$940.00	\$47	7 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	5 10.00	\$250.00	\$25
	Broderick, Betty	144.00	\$1,512.00	\$10.5	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
Rate Source	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
Office Call Type Rate	Moesby, Betty	2.00	\$130.00	\$65	5 2.00	\$130.00	\$65
Per Diem	Preece, Philip	16,00	\$1.040.00	\$65	5 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
	Simoson, 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
	Langent Fern			¢22 1	E67.00	¢19 753 12	632.1

Se	ction	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 🔹

Contraction of the Contraction o	Totals Hours by Pay	/er 💋					
(Al)		- 2017					
Caregiver 24 Hr Live In		March			Grand Total		
Homemaker Hourly		Hours	Amount	Per Hour	Hours	Amount	Per Hour
PCA Hourly	Aquirre, Madeleine	9.0	0 \$189.00	\$21	9.00	\$189.00	\$21
RN Houriy	Associates Insurance	4.1	0 \$92.00	\$23	4.00	\$92.00	\$23
	Atkins, Atty	10.0	0 \$190.00	\$19	10.00	\$190.00	\$19
	Balser, Leigh D	60.0	\$2,100.00	\$35	60.00	\$2,100.00	\$35
	Bellaire, Marcy	96.0	0 \$1,312.52	\$13.7	96.00	\$1,312.52	\$13.7
	Briggs, John	10.0	0 \$250.00	\$25	10.00	\$250.00	\$25
	Broderick, Betty	144.0	0 \$1,512.00	\$10.5	144.00	\$1,512.00	\$10.5
	Cafferty, Jim	2.0	0 \$36.00	\$18	2.00	\$36.00	\$18
	Care Plus	16.0	\$1,600.00	\$100	16.00	\$1,600.00	\$100
	Egret, Bill	4.0	0 \$80.00	\$20	4.00	\$80.00	\$20
	Farnsworth, Grace	6.0	0 \$150.00	\$25	6.00	\$150.00	\$25
	Harpeti, Randy	4.0	0 \$40.00	\$10	4.00	\$40.00	\$10
	Hunter, John	8.	0 \$170.00	\$20	8,50	\$170.00	\$20
	Jones, James	8.0	0 \$160.00	\$20	8.00	\$160.00	\$20
	Lamb, Dirk	10.0	0 \$240.00	\$24	10.00	\$240.00	\$24
	Lapp, John	25.0	0 \$500.00	\$20	25.00	\$500.00	\$20
	Lazar, Maureen	6.0	0 \$120.00	\$20	6.00	\$120.00	\$20
	McKenny, Francis	4.0	0 \$77.00	\$19.3	4.00	\$77.00	\$19.3
te source	Moesby, Betty	2.0	0 \$130.00	\$65	2.00	\$130.00	\$65
(All)	Nevada Health Care	20.0	0 \$1,552.10	\$77.6	20.00	\$1,552.10	\$77.6
Office Call Type Rate	Preece, Philip	16.0	0 \$1,040.00	\$65	16.00	\$1,040.00	\$65
Per Diem	Ruby, Millie	12.0	0 \$252.00	\$21	12.00	\$252.00	\$21
	San Diego Health Care	14.0	0 \$1.070.00	\$76.4	14.00	\$1,070.00	\$76.4
	Simpson, John	6.0	0 \$126.00	\$21	6.00	\$126.00	\$21
	Soullie, Mary	14.	\$1,260.00	\$90	14.00	\$1,260.00	\$90
	Taylor, Ken	18.0	0 \$1.800.00	\$100	18.00	\$1,800.00	\$100
	Vision Nursing Home	24.0	0 \$2.400.00	\$100	24.00	\$2,400.00	\$100
	Zanders, Virginia	4.0	0 \$84.00	\$21	4.00	\$84.00	\$21
	Zangoli, Toni	10.	0 \$220.50	\$21	10,50	\$220,50	\$21
	Grand Total	567.0	\$18,753,12	\$33.1	567.00	\$18,753,12	\$33.1

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.

								00005	bining by ru					_				
Rate	Regular Rate	Regular By Client 🛐 🖉 Regular By Call T								egular By Call Type	e 4							
		Grand Total			Clie	ent Name		Avg Rate		Hours	Amount	Ca	I Туре	Av	g Rate	Hours	A	mount
		lours	Amount		Ag	uirre, Madeleine			\$21.00	9.00	\$189.00	- Ca	regiver 24 Hr Live In		\$250	.80	185.00	\$1,939.1
	+ \$10.00 Total	4.00	\$50.0)	- Ati	kins, Atty			\$35.00	20.00	\$940.00	Ho	memaker Hourly		\$23	.85	69.50	\$1,608.
	Homemaker Hourly	4.00	\$40.0)	Bal	lser, Leigh D			\$35.00	60.00	\$2,100.00	PC	A Hourly		\$59	.67	250.50	\$14,138.0
	PCA Hourly	0.00	\$10.0)	Bel	llaire, Marcy			\$174.33	40.00	\$467.00	RN	Hourly		\$65	.00	2.00	\$130.
1.00 3.00 4.00	+ \$18.00 Total	2.00	\$36.0)	Brig	ggs, John			\$21.20	10.00	\$250.00							
	Homemaker Hourly	2.00	\$36.0)	Bro	oderick, Betty			\$252.00	144.00	\$1,512.00							
	+ \$19.00 Total	10.00	\$190.0)	Ca	fferty, Jim			\$18.00	2.00	\$36.00							
	Homemaker Hourly	10.00	\$190.0)	Egr	ret, Bill			\$20.00	4.00	\$80.00							
	+ \$19.25 Total	4.00	\$77.0)	Fat	rnsworth, Grace			\$25.00	6.00	\$150.00							
	Homemaker Hourly	4.00	\$77.0)	Ha	rpeti, Randy			\$10.00	4.00	\$40.00							
	+ \$20.00 Total	51.50	\$1,030.0)	Hu	inter, John			\$20.00	8.50	\$170.00							
	Homemaker Hourly	18.00	\$360.0)	Jor	nes, James			\$20.00	8.00	\$160.00							
	PCA Hourly	33.50	\$670.0)	Jor	nes, Wendy			\$100.00	12.00	\$1,200.00							
	+ \$21.00 Total	41.50	\$871.5)	Jur	nor, Tammy			\$100.00	10.00	\$1,000.00							
	Homemaker Hourly	23.50	\$493.5)	Lar	mb, Dirk			\$24.00	10.00	\$240.00							
	PCA Hourly	18.00	\$378.0)	Lat	pp, John Mauroon			\$20.00	23.00	\$300.00							
	- \$23.00 Total	4.00	\$92.0)	Ma	zar, Maureen			\$20.00	4.00	\$120.00							
	Homemaker Hourly	4.00	\$92.0)	Mo	call. Timothy			\$100.00	3.00	\$300.00							
	- \$24.00 Total	20.00	\$480.0	1	Md	Kenny Francis			\$19.25	4.00	\$77.00							
	PCA Hourly	20.00	\$480.0)	Mo	esby, Betty			\$65.00	2.00	\$130.00							
	- \$25.00 Total	6.00	\$150.0)	Pre	eece, Philip			\$65.00	16.00	\$1.040.00							
	PCA Hourly	6.00	\$150.0		Ru	by, Millie			\$21.00	12.00	\$252.00							
	- £25.00 Total	60.00	\$2 100.0		Sa	ulnier, Leona			\$250.00	5.00	\$52.10							
	PCA Hourby	60.00	\$2,100.0		Sim	npson, John			\$21.00	6.00	\$126.00							
	A CE OD Tabal	19.00	\$1,170.0	·	Sm	ith, Eddie			\$100.00	3.00	\$300.00							
	+ \$65.00 Total	16.00	\$1,170.00	,	So	ullie, Mary			\$90.00	14.00	\$1,260.00							
_	PCA Houriy	16.00	\$1,040.0	,			-					*						
5	Overtime Rate			5	0	vertime By Clie	nt 7						overtime By Call Type	8				2
		Grand Total			Clie	ent Name		Avg OT Rate	OT	Hours	OT Amount	C	all Type	0,0	T Rate	OT Hours	ID	r Amount
		Hours	Amount		Bel	laire, Marcy			\$375.00	60.00	0 \$ 93	7.52 C	aregiver 24 Hr Live In		\$375.00	1	60.00	\$937.5
	- \$0.00 Total		0.00	\$0.00														
	Caregiver 24 Hr Li	ve 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 Li	ve In	60.00	\$937.52														
	Grand Total		60.00	¢037 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
	Туре.
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
	Туре.

Billing Scatter Chart (e0002)

Load from Billing View Posted screen.



Se	ction	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 Summar	y - f0001					
Call Type	Summary 4										
(All) Caregiver 24 Hr Live In Homemaker Hourly PCA Hourly RN Hourly	Record Count	н 28	Hours (Reg,OT) 485.33		^(Reg,OT) \$4,341.54	Avg Per Hour \$8.95		Clients	Caregiv 32	ers 31	
	Min Rate	M 00	ax Rate \$180.00	OT Hour	OT Hours		OT Amount \$0.00		,		
Description	Totals by Caregiver										
1 (Al)	Caregiver	Record Co	unt Hours (Reg,OT)	Amount (Reg,OT) Per	Hour Units	Regular Ho	urs Regular A	mount Overtime Hour	s Overtime Amount	Clients
Regular	Adams, Abby		4	64.0	\$720.00	\$11.3	0	64.0	\$720.00	0.0	\$0.00
	Alba, Jael		2	2.0	\$36.00	\$18	0	2.0	\$36.00	0.0	\$0.00
	Barnes, Melissa Linda		4	12.0	\$132.00	\$11	0	12.0	\$132.00	0.0	\$0.00
	Bourne, Elizabeth Marisa		2	10.0	\$100.00	\$10	0	10.0	\$100.00	0.0	\$0.00
	Brookins, Joanne		4	2.7	\$30.00	\$11.2	0	2.7	\$30.00	0.0	\$0.00
	Captian, Les Paula		3	9.0	\$103.00	\$11.4	0	9.0	\$103.00	0.0	\$0.00
	Dawson, Becky		5	5.0	\$50.00	\$10	0	5.0	\$50.00	0.0	\$0.00
	Doll, Claudia Nicole		1	1.0	\$11.00	\$11	0	1.0	\$11.00	0.0	\$0.00
	Durco, Shannon		4	16.0	\$160.00	\$10	0	16.0	\$160.00	0.0	\$0.00
	Fluws, Patty		4	7.0	\$73.50	\$10.5	0	7.0	\$73.50	0.0	\$0.00
	Giffel, Lisa		20	44.0	\$462.02	\$10.5	0	44.0	\$462.02	0.0	\$0.00
	H, Blake		5	25.0	\$300.00	\$12	0	25.0	\$300.00	0.0	\$0.00
-	Hemming, Amanda Christine		5	7.5	\$84.40	\$11.3	0	7.5	\$84.40	0.0	\$0.00
Rate Source	Henry, Morey		1	1.0	\$11.00	\$11	0	1.0	\$11.00	0.0	\$0.00
🗹 (Ali)	Jackson, Jean		3	6.0	\$66.00	\$11	0	6.0	\$66.00	0.0	\$0.00
Call Type Rate	James, Rick Kellie		2	6.0	\$60.00	\$10	0	6.0	\$60.00	0.0	\$0.00
Individual-Specific Rate	Leckie, Beatrice AMber		3	3.0	\$37.86	\$12.6	0	3.0	\$37.86	0.0	\$0.00
Office Call Type Rate	McKenny, Brandon J		4	6.0	\$74.16	\$12.4	0	6.0	\$74.16	0.0	\$0.00
Per Diem	Meisel, Mark		2	8.0	\$96.00	\$12	0	8.0	\$96.00	0.0	\$0.00
V Rate	Miller, Mary (Movra)		4	4.0	\$42.00	\$10.5	0	4.0	\$42.00	0.0	\$0.00
	Moray, Fred		7	23.5	\$235.00	\$10	0	23.5	\$235.00	0.0	\$0.00
	Moris, Christal Ricky		5	10.0	\$116.50	\$11.7	0	10.0	\$116.50	0.0	\$0.00
	Pearson, Jane		6	96.0	\$0.00	\$0	0	96.0	\$0.00	0.0	\$0.00
	Petterson, Jillian		8	16.0	\$186.00	\$11.6	0	16.0	\$186.00	0.0	\$0.00
	Ruiloba, Roland		1	0.7	\$7.50	\$11.2	0	0.7	\$7.50	0.0	\$0.00
	Smit, lune		7	22.0	\$269.50	\$12.3	0	22.0	\$269.50	0.0	\$0.00
	Stavenson Kevin		4	8.0	\$95.00	\$12.5	0	8.0	\$95.00	0.0	¢0.00
	Stevenson, reven		3	6.0	\$50.00	\$10.3	0	6.0	\$50.00	0.0	\$0.00
	Swile Jaramish		1	20.0	\$220.00	\$11	0	20.0	\$220.00	0.0	\$0.00
	Taming Sue		2	4.0	\$220.00	\$15.2	1	4.0	\$220.00	0.0	\$0.00
	dilling, sue		4	7.0	300.00	313.4	1	7.0	300.00	0.0	20,00

Se	ction	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.	Jummary 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.

					Sun	nmary by Mont	h - f0002						
Call Type	Totals by Caregi	ver 3											
(All)		v 2017											
		January			February			March			Grand Total		
		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	10.63	7 \$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	\$1,848.08	\$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
Rate Source	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
🖌 (All)	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
Call Type Rate	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
Individual-Specific Rate	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
Office Call Type Rate Der Diom	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
✓ Rate	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
	Ruiloba, Roland	2.67	\$30.00	\$11.25	2.63	7 \$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

<u>Rules:</u> 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.

_ 1		2			f0	003 - Payroll by Rate				1		Ē
ılar Rate	Regular Rate	2		Ð	Regular By Caregiver 🥑			Ð	Regular By Call Type			Ð
)		Grand Total			Caregiver Name	Avg Rate	Hours	Amount	Call Type	Avg Rate	Hours	Amount
0		Hours	Amount		Adams, Abby	\$175.90	643.50	\$7,242.00	Caregiver 24 Hr Live In	\$11	8.98 2,065.3	\$12,435.00
,	▶ \$0.00	960.00	\$0.00		Alba, Jael	\$18.00	19.00	\$342.00	Homemaker Hourly	\$1	1.19 828.5	\$9,139.98
	▶ \$10.00	619.00	\$6,290.00		Barnes, Melissa Linda	\$11.00	93.00	\$1,023.00	PCA Hourly	\$1	2,465.0	\$27,317.68
	▶ \$10.25	50.00	\$512.50		Bourne, Elizabeth Marisa	\$10.3	. 219.00	\$2,249.50	RN Hourly	\$1	3.00 19.0	0 \$342.00
	▶ \$10.50	671.00	\$7,045.70		Brookins, Joanne	\$180.00	26.67	\$300.00				
	▶ \$11.00	865.00	\$9,515.00		Captian, Les Paula	\$11.63	90.00	\$1,030.00				
	▶ \$11.25	75.00	\$844.00		Dawson, Becky	\$10.00	50.00	\$500.00				
	▶ \$11.65	100.00	\$1,165.00		Doll, Claudia Nicole	\$11.00	9.00	\$99.00				
	▶ \$12.00	556.50	\$6,678.00		Durco, Shannon	\$10.00	178.00	\$1,780.00				
	▶ \$12.25	220.00	\$2,695.00		Fluws, Patty	\$10.50	70.00	\$735.00				
	▶ \$12.36	68.00	\$840.48		Giffel, Lisa	\$10.50	438.00	\$4,599.20				
	▶ \$12.62	29.00	\$365.98		H, Blake	\$12.00	250.00	\$3,000.00				
	▶ \$12,65	40.00	\$506.00		Hemming, Amanda Christine	\$11.2	75.00	\$844.00				
	► \$18.00	19.00	\$342.00		Henry, Morey	\$11.00	1.00	\$11.00				
	× \$180.00	1,105,33	\$12,435,00		Jackson, Jean	\$11.00	54.00	\$594.00				
	Grand Total	5 377 83	\$49 234 66		James, Rick Kellie	\$10.00	60.00	\$600.00				
	di and Totai	5,577100	\$ 15,25 1100		Leckie, Beatrice Amber	\$12.6.	29.00	\$365.98				
					McKenny, Brandon J	\$12.3	68.00	\$840.48				
					Melsel, Mark	\$12.00	80.00	\$960.00				
					Miller, Mary (Moyra)	\$10.5	47.00	\$498.00				
					Moray, Fred	\$10.00	231.00	\$2,510.00				
					Pearsen Jane	\$11.0:	060.00	\$1,165.00				
					Pearson, Jane	\$0.00 611.61	159.00	\$0.00				
		6				\$11.0.	138.00	\$1,030.00 +				
5	Overtime Rate				Overtime By Caregiver 💙 .				i Overtime By Call Type 🤒			
-		Grand Total			Caregiver Name Ave	g OT Rate OT	Hours	OT Amount	Call Type Avg	OT Rate O	T Hours C	OT Amount
		Hours	Amount									
	▶ \$0.00	0.00	\$0.00									
	Grand Total	0.00	\$0.00									

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

(AII)	Payroll Records				D
Caregiver 24 Hr Live In	Caregiver	Days Worked	Total Hours	Total Amount	
Homemaker Hourly	Adams, Abby		4.00	64.00	\$720.00
PCA Hourly	Alba, Jael		2.00	2.00	\$36.00
RN Hourly	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
Regular	Jackson, Jean		3.00	6.00	\$66.00
Y regular	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
	Petterson, Jillian		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
Call Type Rate	Taming, Sue		1.00	4.00	\$60.60
Individual-Specific Rate	Thomas, Alfred		2.00	40.00	\$440.00
C Individual-Specific Rate C Individual-Specific Rate Office Call Type Rate P Per Diem Rate Rate	Thomas, Alfred		2.00	40.00	\$440.0

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