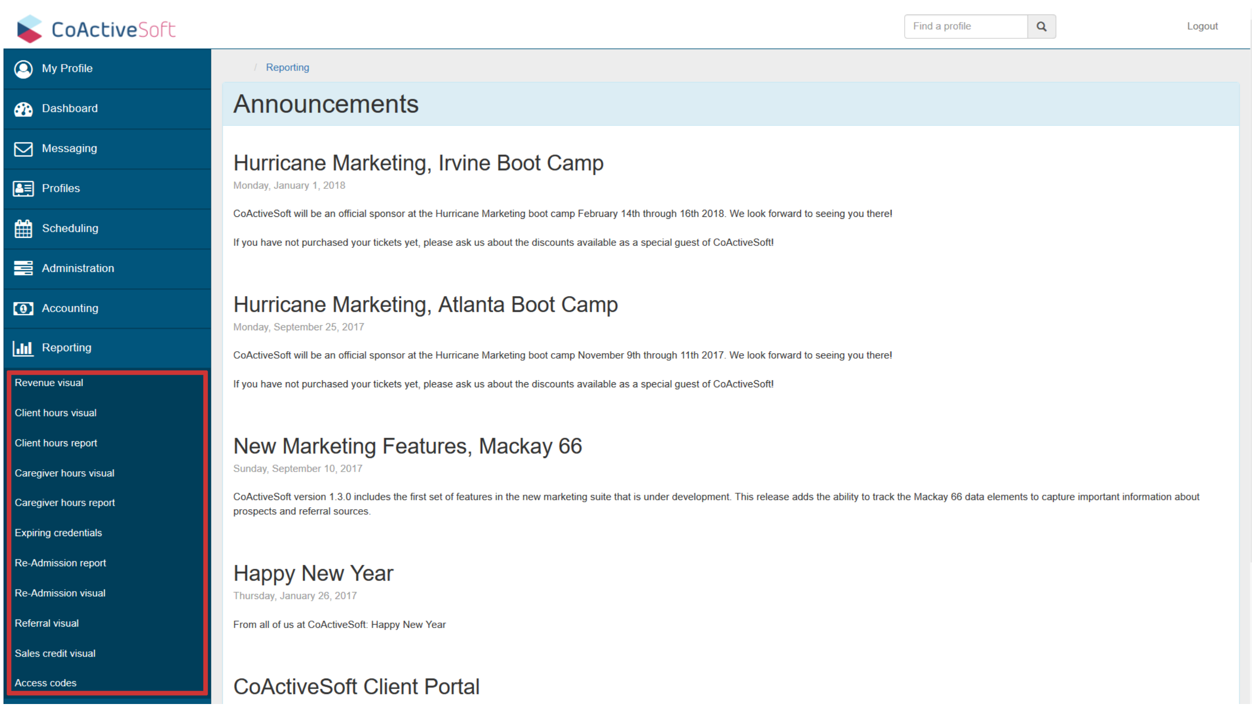
CoActiveSoft Reporting User Manual

Accessing CoActiveSoft Reporting

CoActiveSoft includes several reports which agents can use to simplify their business processes. From the home screen, when clicking on the Reporting tab, the following reports are available:

- Revenue visual
- Client hours visual
- Client hours report
- Caregiver hours visual
- Caregiver hours report
- Readmission report
- Readmission visual
- Sales credit visual



Reporting Tab in Main Menu Area

Note that the menu item ‘Access Codes’ is covered in the CoActiveSoft Provider Portal and Time Tracking user manual. The menu item ‘Expiring credentials’ is also covered in the CoActiveSoft Credential Management user manual.

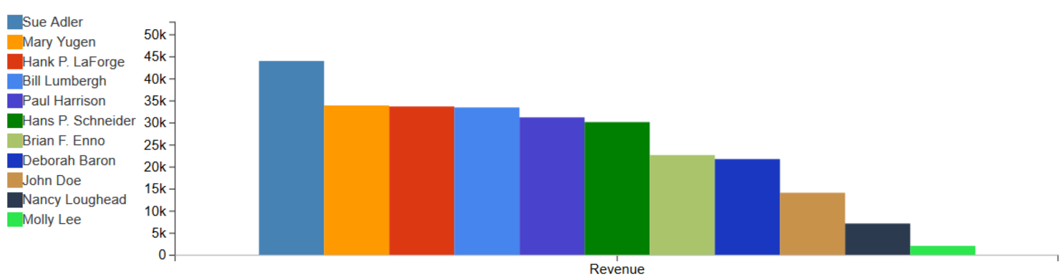
Revenue Visual Report

For this report to be useful, agents need to make use of CoActiveSoft’s invoicing application (see the ‘Creating an Invoice’ section of the CoActiveSoft Financial Management user manual).

This section is only visible to agents and external billing agent profiles.
To Access the revenue visual reports, click on ‘Revenue visual’ under the main ‘Reporting’ section

Start Wed 5/17/17 ❶ **End** Sat 6/30/18 ❷

❸ Customer	Revenue ❹
Sue Adler	$44,062.25
Mary Yugen	$33,975.00
Hank P. LaForge	$33,750.00
Bill Lumbergh	$33,525.00
Paul Harrison	$31,275.00
Hans P. Schneider	$30,200.00
Brian F. Enno	$22,725.00
Deborah Baron	$21,810.00
John Doe	$14,175.00
Nancy Loughead	$7,200.00
Molly Lee	$2,125.00
Total	$274,822.25



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Revenue Report Screen

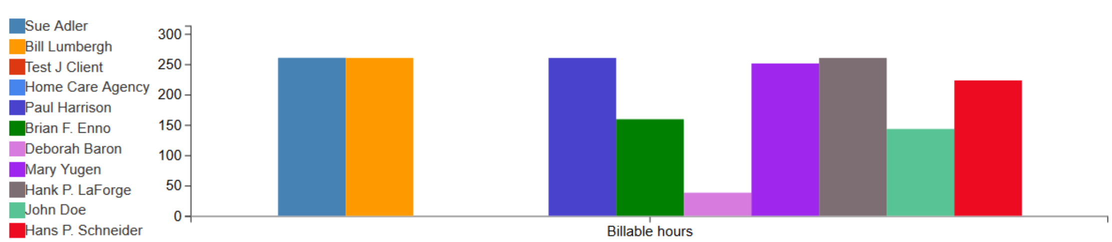
On the Revenue Report screen, select the start (1) and end (2) dates for the report, and CoActiveSoft will display the dollar amount that has been invoiced for the selected period. Click on the up or down arrows for Customer (3) and Revenue (4) to sort the report.

Client Hours Visual Report

The dollar amounts shown in this section are only visible to agents and external billing agent profiles.
This report displays the number of billable hours for all clients over a selectable date range:

Start Sun 4/8/18 ❶ **End** Sat 6/30/18

Client ❷	**Billable hours** ❸
Sue Adler	261.27
Bill Lumbergh	261
Paul Harrison	261
Hank P. LaForge	261
Mary Yugen	252
Hans P. Schneider	224
Brian F. Enno	160
John Doe	144
Deborah Baron	39
Test J Client	0
Home Care Agency	0
Total	1863.27

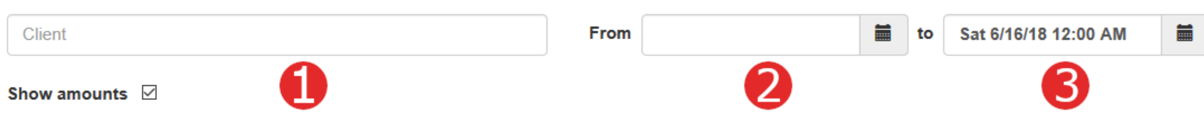


Client hours report screen

On the client hours visual report screen, select the range of dates to view data (1). After filling in the dates, you can sort the columns by clicking on the arrows next to client (2) and billable hours (3).

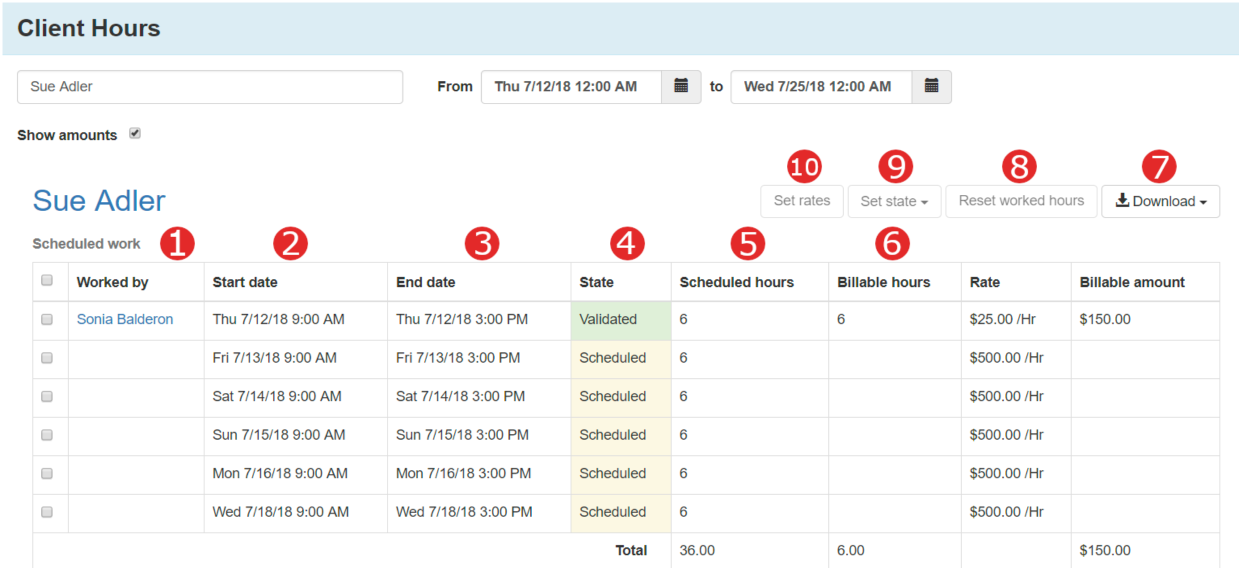
Customizing the Client Hours Report

The Client Hours Report is useful to any agent who wants to quickly get an understanding of what services were provided for a patient and who provided those services.
The dollar amounts shown in this section are only visible to agents and external billing agent profiles.



Client Hours Report Criteria Screen

On the Client Hours Report screen, select the patient (1), the start date (2), and end date (3) for the report, and CoActiveSoft displays the report for the selected parameters:



Client Hours Report Screen

The client hours report lists the details of the shifts and supertasks that the agent has scheduled. To edit a shift, click on one of the listed rows. For more detailed inform on the data in this report, please refer to the CoActiveSoft Schedule Management user manual.

1 – Work Type
This report includes a section for each supertask, such as tube feeding in this example, and a section for scheduled shifts.

2, 3 – Start and end date and time for the shift or supertask.

4 – State of the shift or supertask

5, 6 – Number of scheduled and billable hours

7 – Download button
To download a PDF version of this client hours report, click this button.

8 – Reset worked hours button
If you would like to set the worked hours to be the same as the scheduled hours for the selected shift(s), click this button.

9 – Set state button

Use this button to set the state of the selected shift(s).

10 – Set rates button
It is also possible to set the rates of the selected shift(s) using this button.

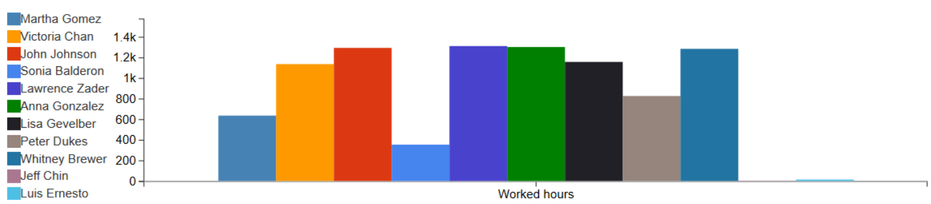
Caregiver Hours Visual

The Caregiver Hours page is useful to any agent who wants to get an overview of the distribution of hours among all caregivers.

Caregiver hours

Start Mon 12/11/17 1 End Sat 6/30/18 2

3 Caregiver	Worked hours 4
Lawrence Zader	1314
Anna Gonzalez	1305
John Johnson	1296
Whitney Brewer	1287
Lisa Gevelber	1160
Victoria Chan	1138.74
Peter Dukes	829
Martha Gomez	639
Sonia Balderon	357
Luis Ernesto	18
Jeff Chin	8
Total	9351.74



Caregiver Hours Visual Report screen

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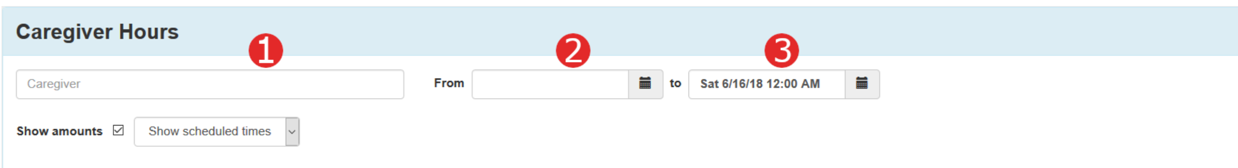
On the Caregiver Hours Visual Report screen, select the start (1) and end (2) date for the report, and CoActiveSoft lists all the caregivers who worked during the selected period. Click on the up or down arrows for Caregiver (3) and Worked Hours (4) to sort the report.

Caregiver Hours Report

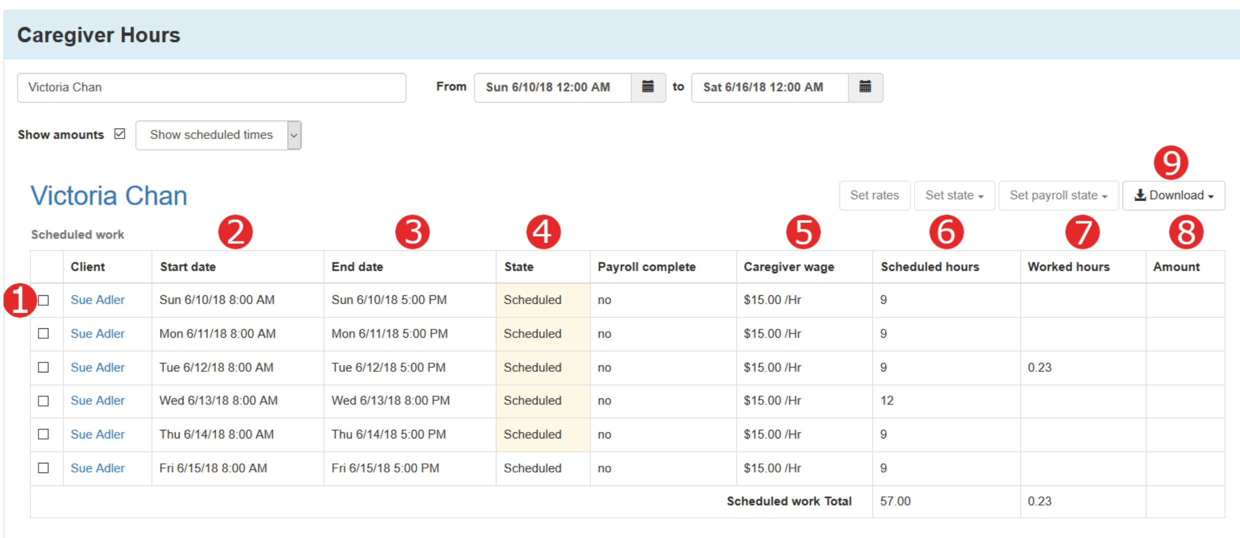
The dollar amounts shown in this section are only visible to agents and external billing agent profiles.

The Caregiver Hours Report is useful to any agent who wants to quickly get an overview of what shifts a particular caregiver worked.



Caregiver Hours Report Screen

On the Caregiver Hours Report screen, select the caregiver (1), the start (2) date and end (3) date for the report, and CoActiveSoft displays the report according to the selected parameters:



	Client	Start date	End date	State	Payroll complete	Caregiver wage	Scheduled hours	Worked hours	Amount
☐	Sue Adler	Sun 6/10/18 8:00 AM	Sun 6/10/18 5:00 PM	Scheduled	no	$15.00 /Hr	9		
☐	Sue Adler	Mon 6/11/18 8:00 AM	Mon 6/11/18 5:00 PM	Scheduled	no	$15.00 /Hr	9		
☐	Sue Adler	Tue 6/12/18 8:00 AM	Tue 6/12/18 5:00 PM	Scheduled	no	$15.00 /Hr	9	0.23	
☐	Sue Adler	Wed 6/13/18 8:00 AM	Wed 6/13/18 8:00 PM	Scheduled	no	$15.00 /Hr	12		
☐	Sue Adler	Thu 6/14/18 8:00 AM	Thu 6/14/18 5:00 PM	Scheduled	no	$15.00 /Hr	9		
☐	Sue Adler	Fri 6/15/18 8:00 AM	Fri 6/15/18 5:00 PM	Scheduled	no	$15.00 /Hr	9		
						Scheduled work Total	57.00	0.23	

Caregiver Hours Report

The caregiver hours report lists the details of the shifts that the agent has scheduled. For more detailed information on the data in this report, please refer to the CoActiveSoft Schedule Management user manual.

1 – Client name / Select
For caregivers who worked for more than one client, the report includes separate section for each client. If you click on one of the rows, it is possible to edit all the information easily.

2, 3 – Start and end date and time for the shift

4 – State of the shift

5 – Caregiver wage

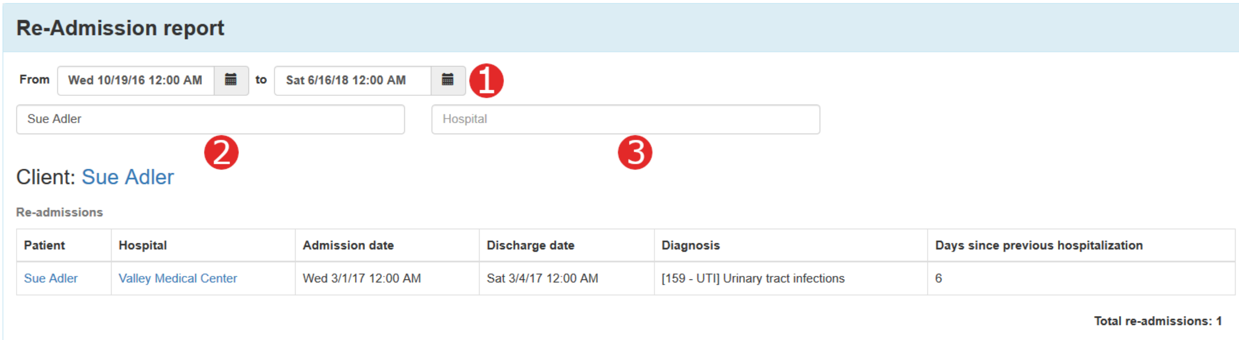
6, 7 – Number of scheduled and billable hours

8 – Amount
The amount the caregiver earned for this shift. The caregiver needs to be entered for the shift for this value to appear on the report.

9 – Download button
To download a PDF version of this client hours report, click this button.

Re-Admission Report

If you would like to check on a client and see when they were re-admitted into a hospital, this is the section to view re-admissions.

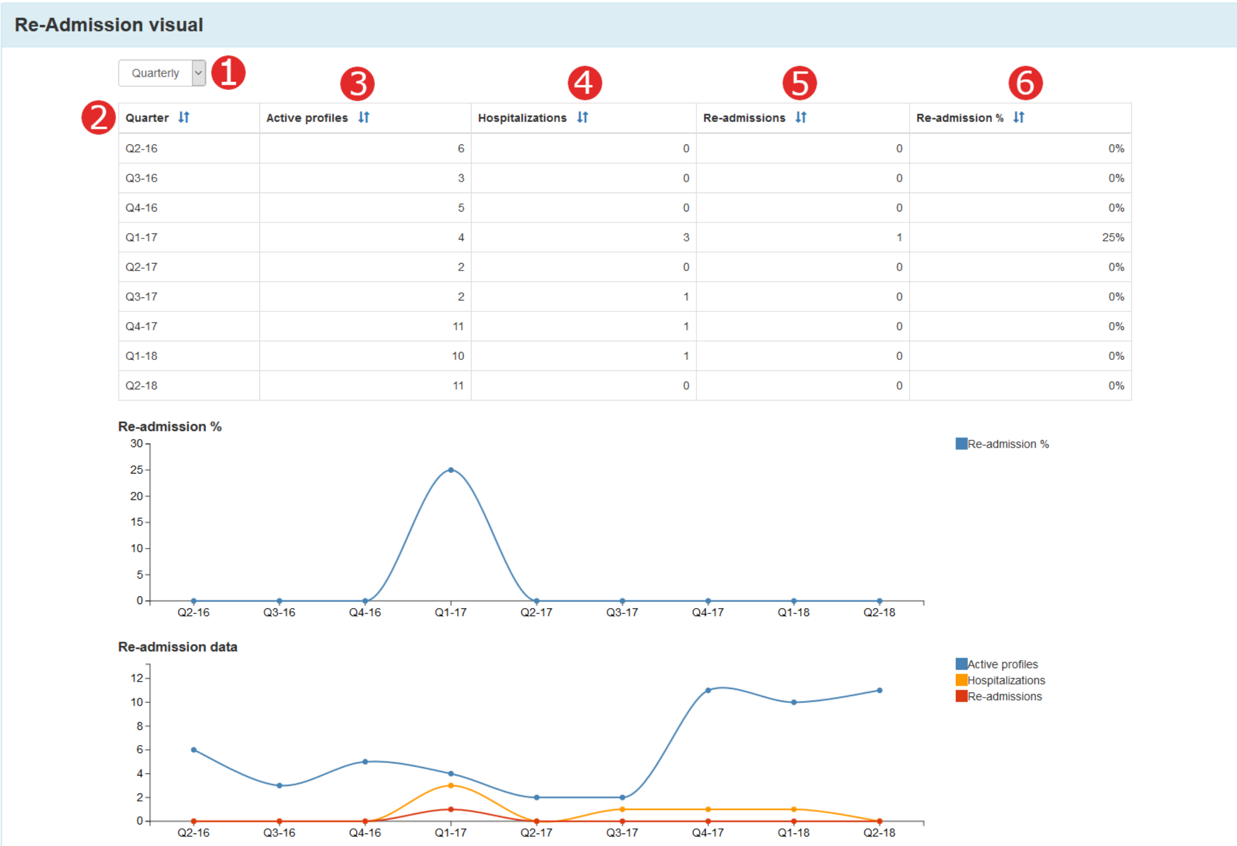


Re-Admission Report

For this section, start by specifying a range of dates to search through (1). Next, you can fill out the client field with a client name (2) or hospital (3) to target your search.

Re-Admission Visual

Use the Re-Admission Visual section to graphically show how often clients were re-admitted into a hospital. This visualization can be sorted by month, quarter, or year (1).



Re-Admission visual

Quarterly

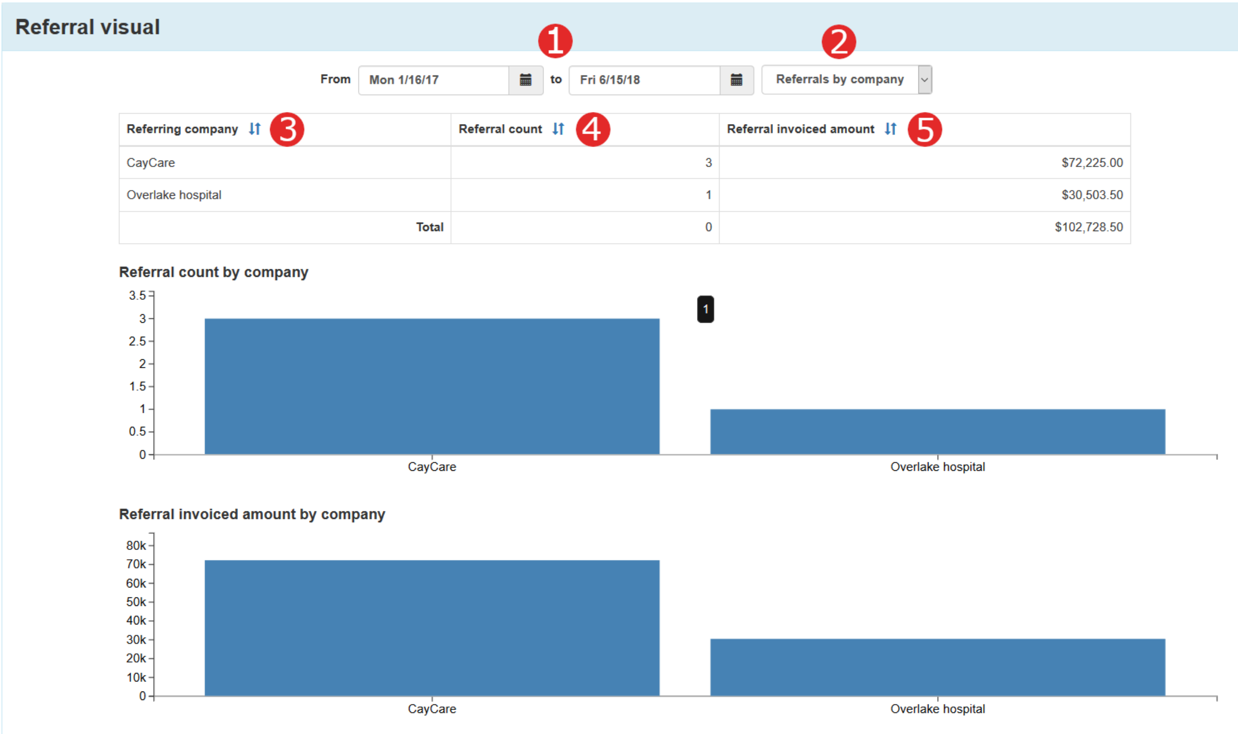
Quarter	Active profiles	Hospitalizations	Re-admissions	Re-admission %
Q2-16	6	0	0	0%
Q3-16	3	0	0	0%
Q4-16	5	0	0	0%
Q1-17	4	3	1	25%
Q2-17	2	0	0	0%
Q3-17	2	1	0	0%
Q4-17	11	1	0	0%
Q1-18	10	1	0	0%
Q2-18	11	0	0	0%

Re-admission Visual Section

To view all of the data easier, there are multiple sorting options in this section. Click on the respective arrows to sort by quarter (2), active profiles (3), hospitalizations (4), re-admissions (5), and re-admission % (6).

Referral Visual

The referral visual section is useful to see where your clients are coming from, whether it is a company or an individual agent.
For each client, it is possible to specify whoever referred them to your service. To enter in this information, go to the client's profile and their 'Marketing' tab, and then fill out information in the 'Referred by' section.

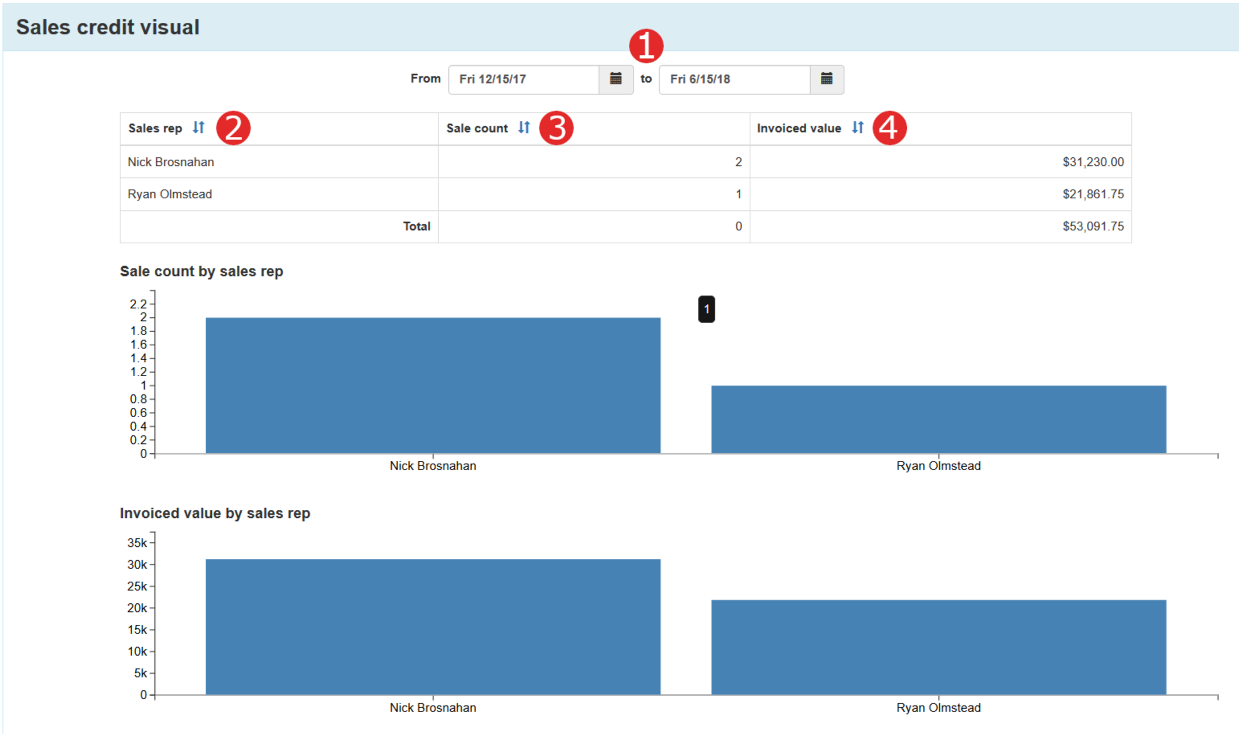


Referral Visual Section

First, specify the time frame of the referrals you would like to look at (1). By default, CoActiveSoft displays the referrals by company but this can be changed to referrals by agent by clicking on the drop down menu (2).
The resulting data can be sorted by referring company (3), referral count (4), and referral invoiced amount (5).

Sales Credit Visual

This section exists to show how many sales and the dollar amount that sales representatives have contributed to the company.
For a given client profile, the 'sales credit – reps' section (under the 'Marketing' tab) is where you would enter in the information to displayed in this visual.



Sales Credit Visual Section

To view the data, you must specify a range of dates for CoActiveSoft to look through (1). After that, you can sort by sales rep name (2), sale count (3), and invoiced value (4).