WorkRecords Supplier Certification
Data Progress Report

Assessment Date: enter text

Supplier's Name	Click here to enter text
Location	Click here to enter text
Month/Year Supplier Became Certified	Click here to enter text

Assessment Areas	Goal(s)	Supplier's Grade
Duplicate Orders	• Zero duplicate orders	enter text
Orders Entered After Projected Start Date	• Less than 5% of orders entered after projected start date	enter text
Unapproved WorkSegments	• No unapproved WorkSegments more than 21 days old	enter text
TimeCards Not Yet Invoiced	• No uninvoiced TimeCards more than 45 days old	enter text
Invoices	• Only 1 invoice presented per period • No department invoicing (unless required by client) • No notes to pay amount different than what is listed on the invoice	enter text
Credit / Charge Adjustments	• Credit / Charge Adjustments are used appropriately	enter text
Edits	• Less than 8% edits for training related issues	enter text

Notes
This progress report is based on a snapshot of your recent WorkRecords data. These progress reports are prepared randomly to assist Certified Suppliers with staying on track for quick and easy re-certification every 6 months. Click here to enter a limited amount of text. Text box will not grow, so amount of text entered is limited to what can appear in this box.

WorkRecords Data Reviewed By: Click here to enter your initials

WorkRecords Supplier Certification
Data Progress Report

The purpose of this assessment is to bring attention to any areas of your WorkRecords data that need improvement. Please review the training materials on the WorkRecords e-Support site for any assessment areas on page 1 which need improvement. If after reviewing the training materials, you have unanswered questions, please submit an e-Support ticket requesting to schedule a training call with the WorkRecords Support Team member that conducted your data assessment. *Note:* WorkRecords Support Team member's initials are on the bottom of page 1.

Assessment Areas and Goals	Training Resources for Assessment Areas To access the training documents, first log in to www.workrecords.com. Click on Support > Access Training Resources. Then click on any of the links below.
Duplicate Orders • Zero duplicate orders	• What is a Duplicate Order? • FAQ – What's so bad about having Duplicate Orders in the system? • Video – Create Order Confirmations using Templates (see 2:20 to 3:00) • How to search for workers with more than 1 Active Order • Closing an Order with no approved hours • Closing Order Confirmations
Orders Entered After Projected Start Date • Less than 5% of orders entered after projected start date	• Create Order Confirmations
Unapproved WorkSegments • No unapproved WorkSegments more than 21 days old	• Using the Review Unapproved WorkSegments Report
TimeCards Not Yet Invoiced • No uninvoiced TimeCards more than 45 days old	• Presenting Invoices in WorkRecords
Invoices • Only 1 invoice presented per period • No department invoicing (unless required by client) • No notes to pay amount different than what is listed on the invoice	• Presenting Invoices in WorkRecords • Why are Invoices by Department no longer necessary? • What steps should I take to reconcile an Invoice with my back office system to the WorkRecords Invoice?
Credit / Charge Adjustments • Credit / Charge Adjustments are used appropriately	• How can a mistake made on an Invoice be corrected? • Steps for creating a Credit / Charge Adjustment • How to use Make Up Order Confirmations • Invoicing for a Credit / Charge Adjustment
Edits • Less than 8% edits for training related issues	• Monitor Worker Activity • Train workers to use the Kiosk