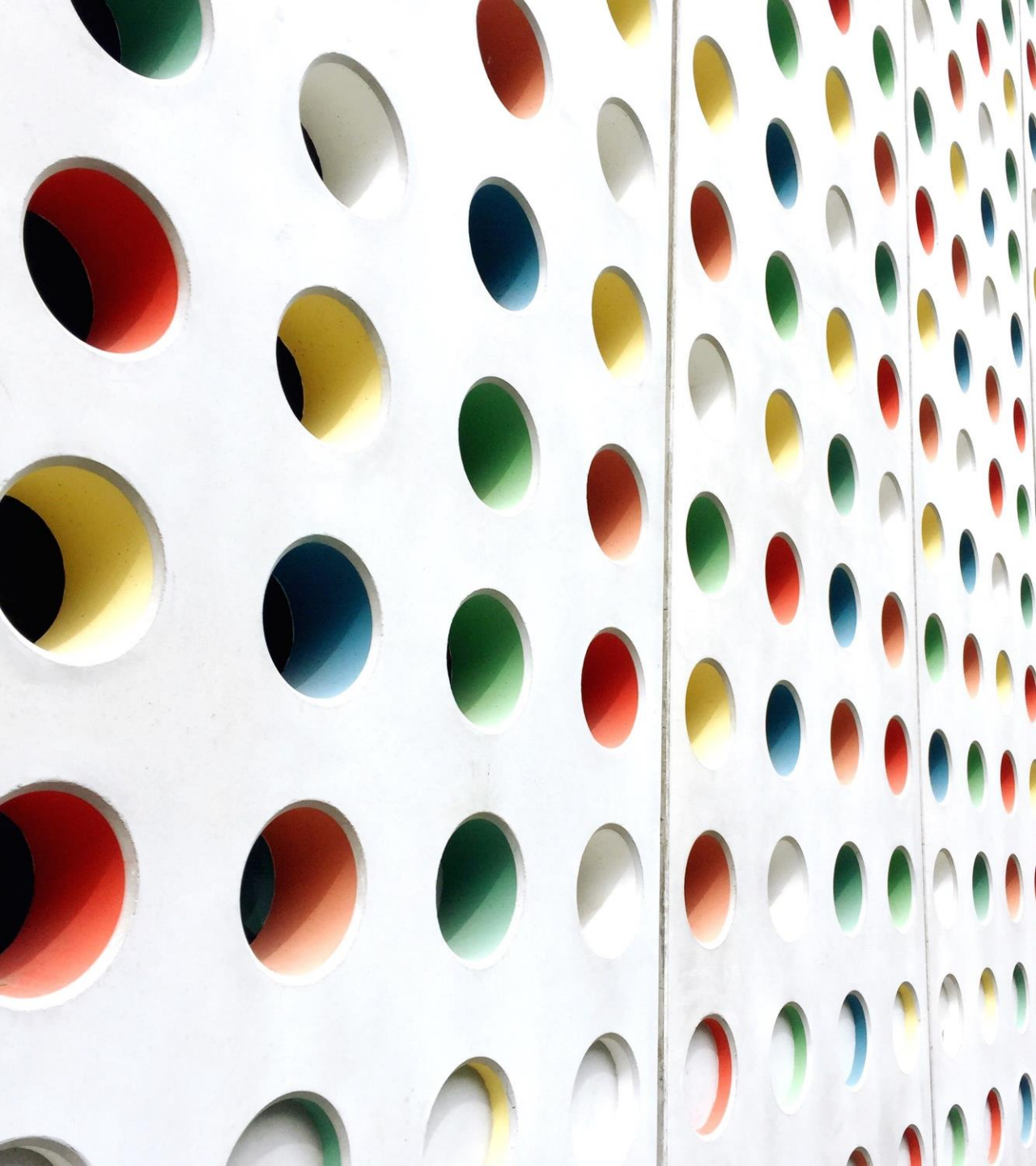




COMPLIANCE TAB

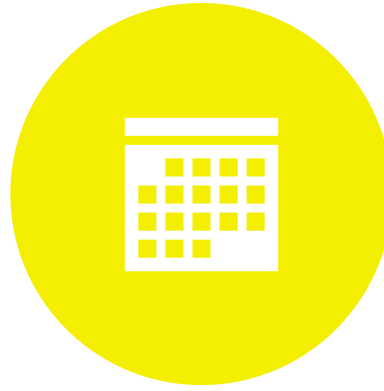


hosted by:
BRAD JACKSON
KRISTEN TAYLOR

AGENDA



OVERVIEW



DUE DATES &
EXPIRATIONS



COMPLIANCE TRACKING
& MONITORING

OVERVIEW

-  At a glance snapshot of home/case/staff compliance
-  Categories & rules are built-in
-  Dates are tracked
-  High-level color-coded check list – nothing to remember on your own!

DUE DATES & EXPIRATIONS

DUE DATES

Dates in which an event should occur or when a document should be submitted without being considered “Late” or “Missed”

- Triggered items (admission, discharge, another activity/report)
- Treatment plan
- Agreements

Admission	
 Referral Packet	Due soon 06/15/2021 ⋮
Placement	
 Case Plan	Due soon 06/25/2021 ⋮
Casework	
 Treatment Plan	Due on 07/15/2021 ⋮

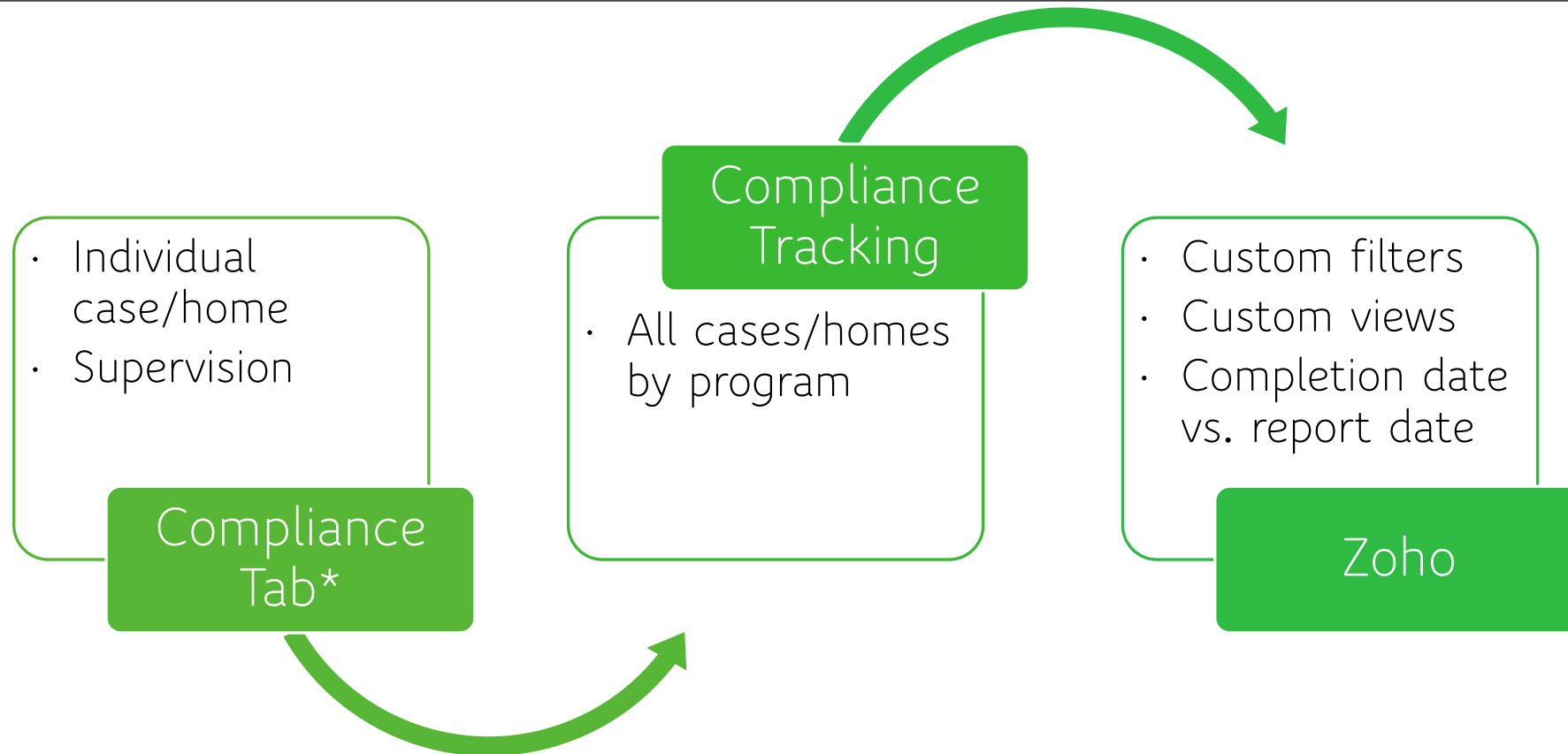
EXPIRATIONS

Track when a recorded event, document, or training needs to be performed again or an updated version collected

- Driver's license/ID
- Training
- Background check/clearance
- Vehicle insurance/registration

Vehicle	
 Vehicle Insurance (Milano)	Expires 11/18/2021 ⋮
 Vehicle Registration (Milano)	Expires 05/13/2022 ⋮

COMPLIANCE TRACKING & MONITORING



**Compliance checklist also available on the Foster Family Web (to be covered in a future webinar)*

RESOURCES

-  Agency System Administrator (SA)
-  User Guide
-  eR Support support@extendedreach.com

  **Answers**  **Ask**

Case Screen: Compliance Tab
Content Introduction Compliance Tab Overview
Categories Features Filter and Export
Compliance Tracking Introduction This article is meant to assist you with the "Compliance Tab" within a Case. The...

Home Screen: Compliance Tab
Content Introduction Home Screen: Compliance Tab Overview Categories Features Export and Filter Introduction This article is meant to assist you with the "Compliance Tab" within a Home. The...

Home Activity Types (Training)
Content Introduction Explanation and Purpose of Home Training Security Level Requirements

compliance tab 

