



extended**Reach**
powered by **k**care

BASIC REPORTING

FOSTER CARE

Welcome to extendedReach!

Interact with Us

- We are recording so turn off cameras and mute sound for best recording quality.
- Find Questions and Answers on Zoom Toolbar and submit questions.
- Presenters will pause periodically to answer questions and respond to unanswered questions after the session.
- Lots of information covered in 1-hour session, so plan to access recording for later viewing.
- Later, reinforce your learning by viewing recording and pausing to navigate in extendedReach for hands-on practice.



Agenda



Basic Reports Overview



Access



Support Resources



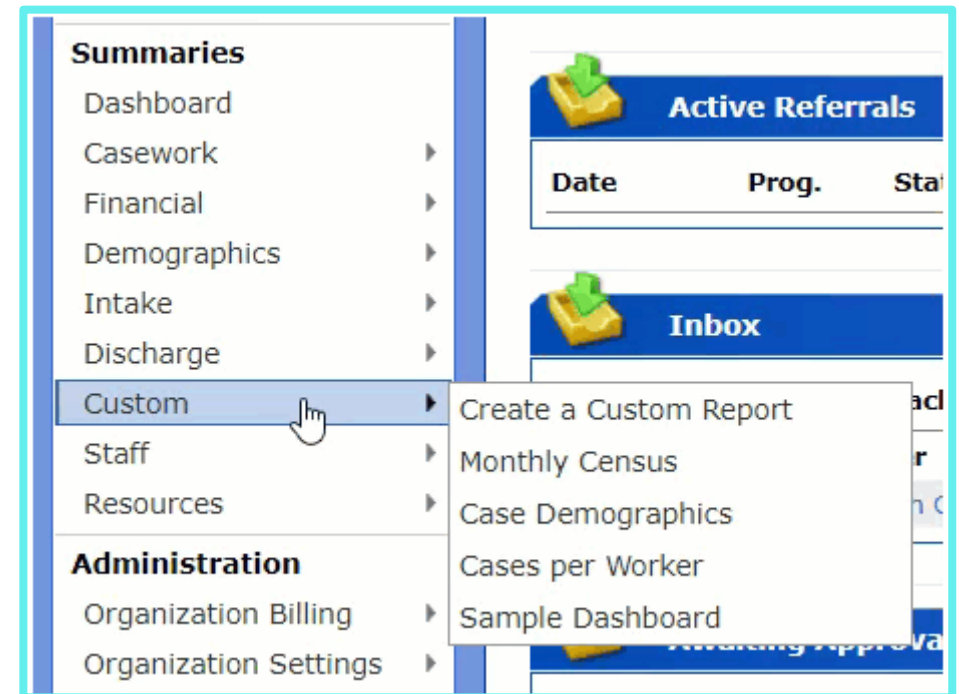
extendedReach Side Menu

- extendedReach is organized in a manner that allows you to easily access information.
- Your workspace is customized to meet your specific needs based on your role within your agency.
- The Side Menu, however, provides comprehensive agency-wide data, accessed through “Views”.
- Depending on your User ID permissions, some of these views may not be viewable for you. Please contact your agency administrators for permission to access those views.
- The Administration tools are restricted to administrative use only.

My Stuff	
My Workspace	
My Tasks	
Cases	
Case Rosters	▶
Case Tasks	▶
Homes	
Home Rosters	▶
Home Tasks	▶
HomeMatch™	
Summaries	
Dashboard	
Casework	▶
Demographics	▶
Intake	▶
Discharge	▶
Staff	▶
Resources	▶
Administration	
Organization Billing	▶
Organization Settings	▶
Program Settings	▶
System Settings	▶

Zoho Reports

- Zoho Reports (<http://reports.zoho.com>) is a 3rd party custom report and dashboard builder available as an optional add-on item.
- If your agency doesn't currently have this option and you are interested in learning more, please contact sales@extendedreach.com.
- Zoho Reports allows an administrator to quickly build charts, tables, and dashboards using an intuitive drag-and-drop interface. Once your reports are built, you can choose to add them to the side-menu in extendedReach and share with others in your agency. Zoho reports is restricted to administrative use only; publishing the reports to the side-menu allows all staff to view the report.



Access

- Access to the side menu reports is given in the User ID or User Group > Security Rights > Navigation
- Access Case Menus
- Access Home Menus
- Access Summaries Menus
- Access Summaries (Staff & Resources)
- Access Summaries (Resources Only)

Group Information

Group Name:

Caseworkers

Organization:

Enchanted Family Services (Stor

Description:

Child case worker

Security Rights

Administrator:

No

Apply Profile:

- Select a Profile to Apply -

Type	Add	Delete	Edit	Approve	Complete
Cases:	<input type="checkbox"/>	<input type="checkbox"/>	<input checked="" type="checkbox"/>	-	-
Case Activities:	<input checked="" type="checkbox"/>	<input checked="" type="checkbox"/>	<input checked="" type="checkbox"/>	<input type="checkbox"/>	<input checked="" type="checkbox"/>
Case Reports:	<input checked="" type="checkbox"/>	<input checked="" type="checkbox"/>	<input checked="" type="checkbox"/>	<input type="checkbox"/>	<input checked="" type="checkbox"/>
Homes:	<input type="checkbox"/>	<input type="checkbox"/>	<input checked="" type="checkbox"/>	-	-
Home Activities:	<input checked="" type="checkbox"/>	<input checked="" type="checkbox"/>	<input checked="" type="checkbox"/>	<input type="checkbox"/>	<input checked="" type="checkbox"/>
Home Reports:	<input checked="" type="checkbox"/>	<input checked="" type="checkbox"/>	<input checked="" type="checkbox"/>	<input type="checkbox"/>	<input checked="" type="checkbox"/>

Navigation:

☒ Access My Stuff Menus

☐ Access Cases Menus

☐ Access Homes Menus

☐ Access Summaries Menus

☐ Access Summaries (Staff & Resources Only)

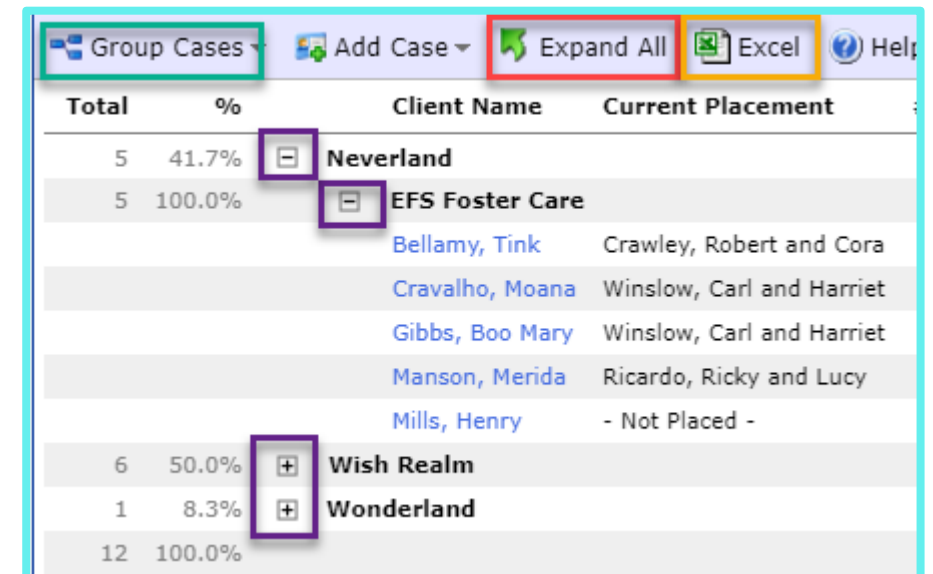
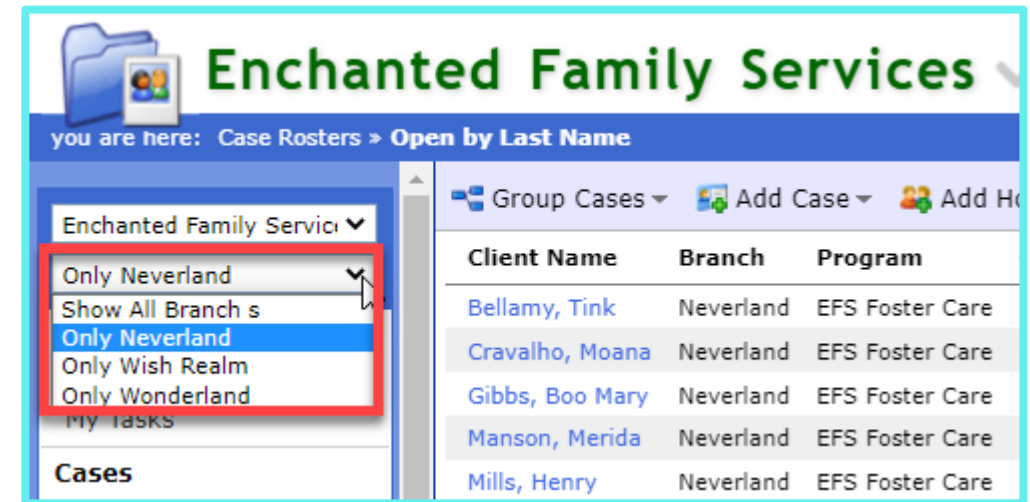
☐ Access Summaries (Resources Only)

☒ Use Search

☒ Modify Workspace Setup

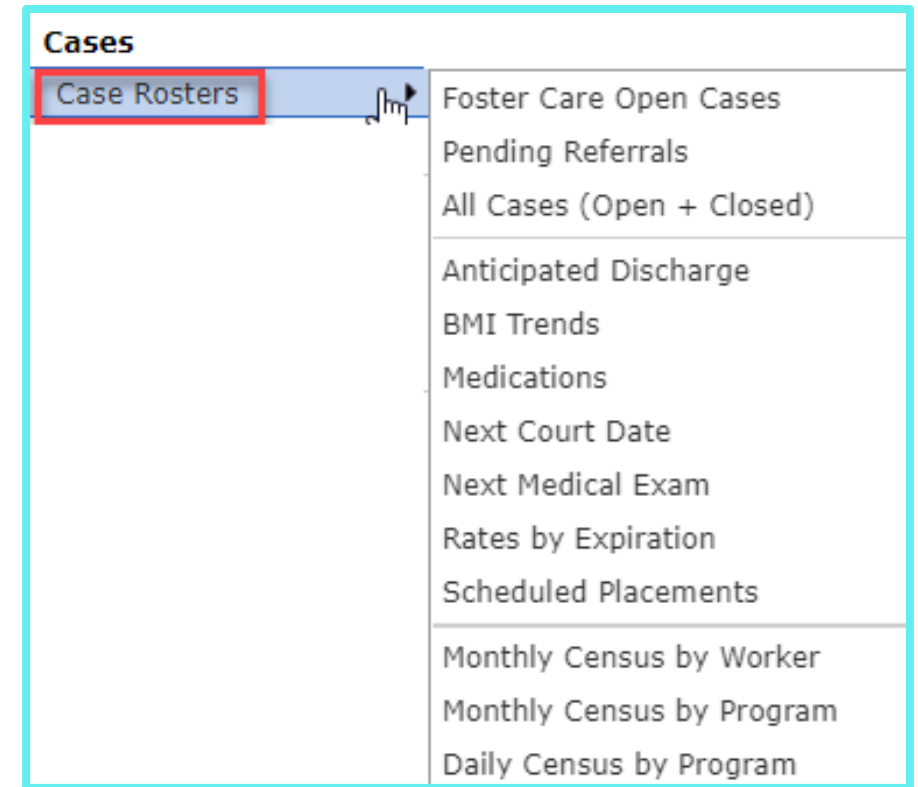
Side Menu Actions

- Filter by Branch, if applicable
 - Select a specific branch to filter records
 - To view all branches, select "Show All Branches"
- Excel Button
 - Click the "Excel" button on the top menu bar to download, and you will be prompted to open the file
- Groups
 - Click the "Group" button on the top menu bar to group data in a variety of ways
- Expand or collapse data
 - Click the plus or negative icons one by one, or
 - Click "Expand All" button to expand everything at once
- Note: You may see different naming for reports depending upon your agency configurations and programs (Foster Care, Adoption, Residential, etc.)



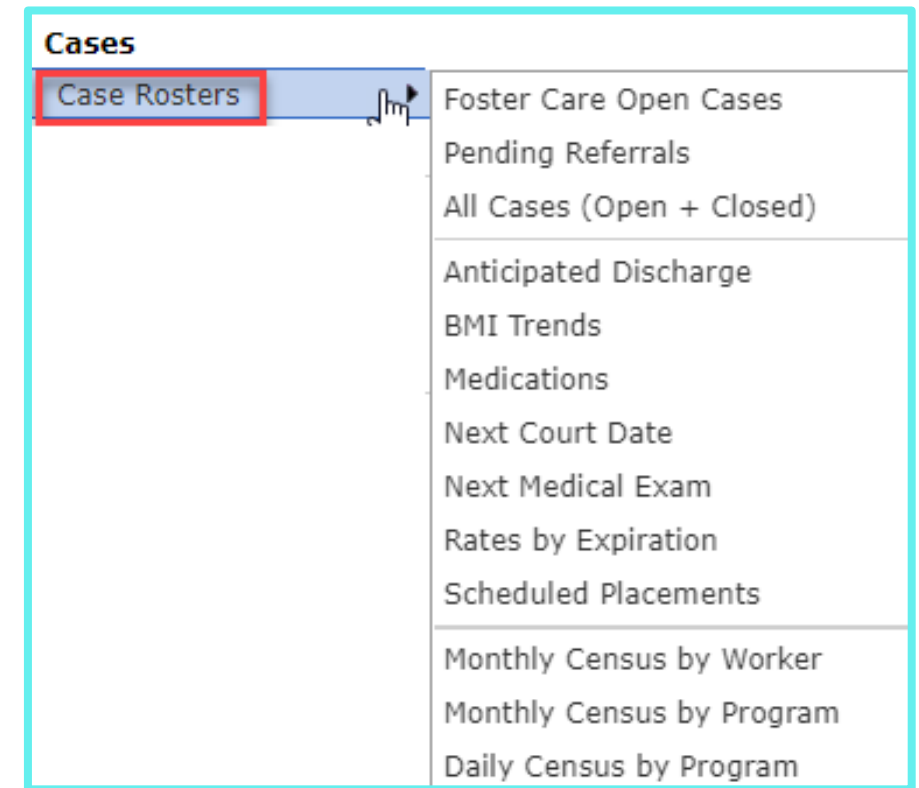
Cases > Case Rosters

- Foster Care Cases – Open Cases (may also appear as “Residential Cases”)
- Adoption Cases – Open Adoption Cases, if applicable to agency
- Pending Referrals – All pending and accepted referrals
- All Cases (Open + Closed) – All Cases
- Anticipated Discharge – All Cases with an anticipated discharge date entered on case general tab
- BMI Trends – If your agency records changes in a child’s height and weight (BMI) over time the last two measures will appear here along with a comparative calculation and any active medications.
- Medications – Medications recorded for Open Cases



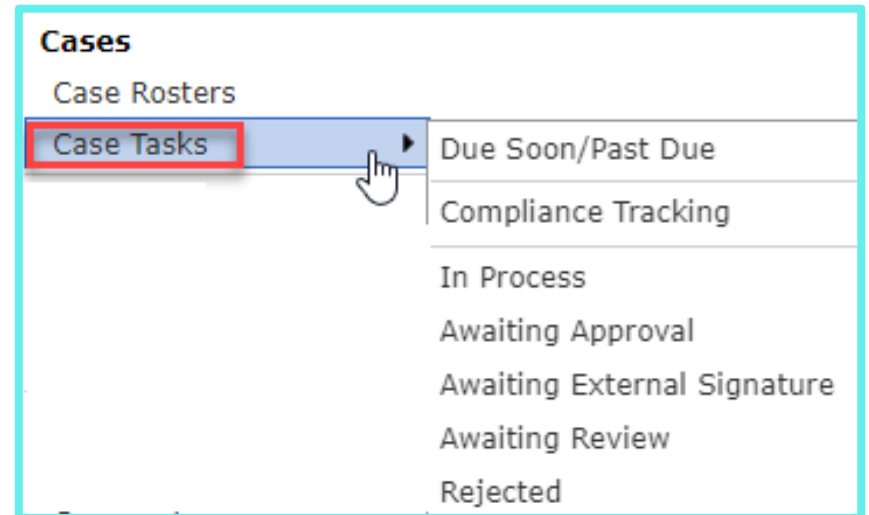
Cases > Case Rosters

- Next Court Date – Open cases that have Next Court Date on General Tab
- Next Medical Exam – Open cases that have upcoming medical appointments (can Group by Medical/Dental/Psychological/etc.)
- Rates by Expiration – Open cases that have a Rate Expires Date on General Tab
- Scheduled Placements – Open cases that have one or more placements scheduled at a future date
- Monthly Census by Worker – Number of Open Cases an Agency Case Worker has assigned to them in a particular month or in total over a year
- Monthly Census by Program – Number of Open Cases in a Program in a particular month or in total over a year
- Daily Census by Program – Number of Open Cases in a Program on a particular day or in total over a year



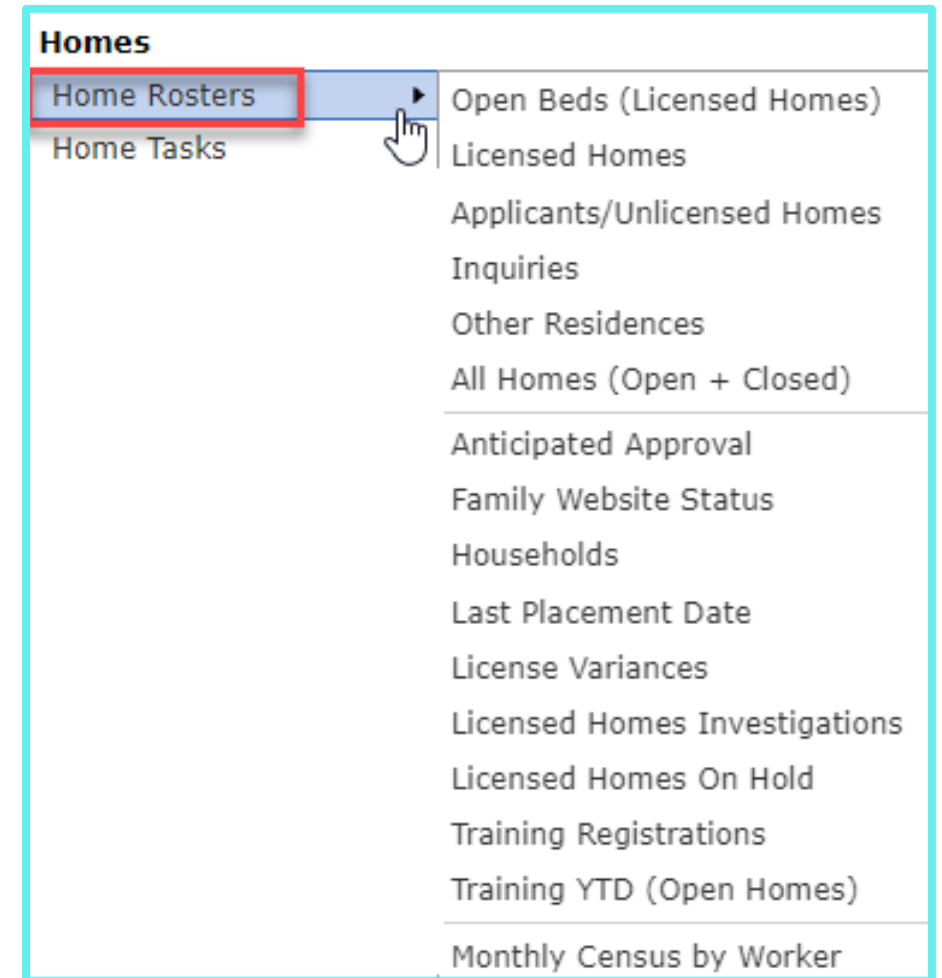
Cases > Case Tasks

- Due Soon/Past Due – all activities/reports due soon or past due
- Compliance Tracking – all cases along with the items on the compliance tab that are either completed, overdue, or due soon
- Daily Activity Summary – completion status of select daily program activities; setting under organization preferences; identify activities or reports as daily activities in configurator
- In Process – items in the process of being completed
- Awaiting Approvals – items awaiting approval from a supervisor in order to be marked as complete
- Awaiting External Signatures (package specific) – items awaiting external signatures
- Awaiting Review – items awaiting review
- Rejected – items rejected by approving person and returned to form creator



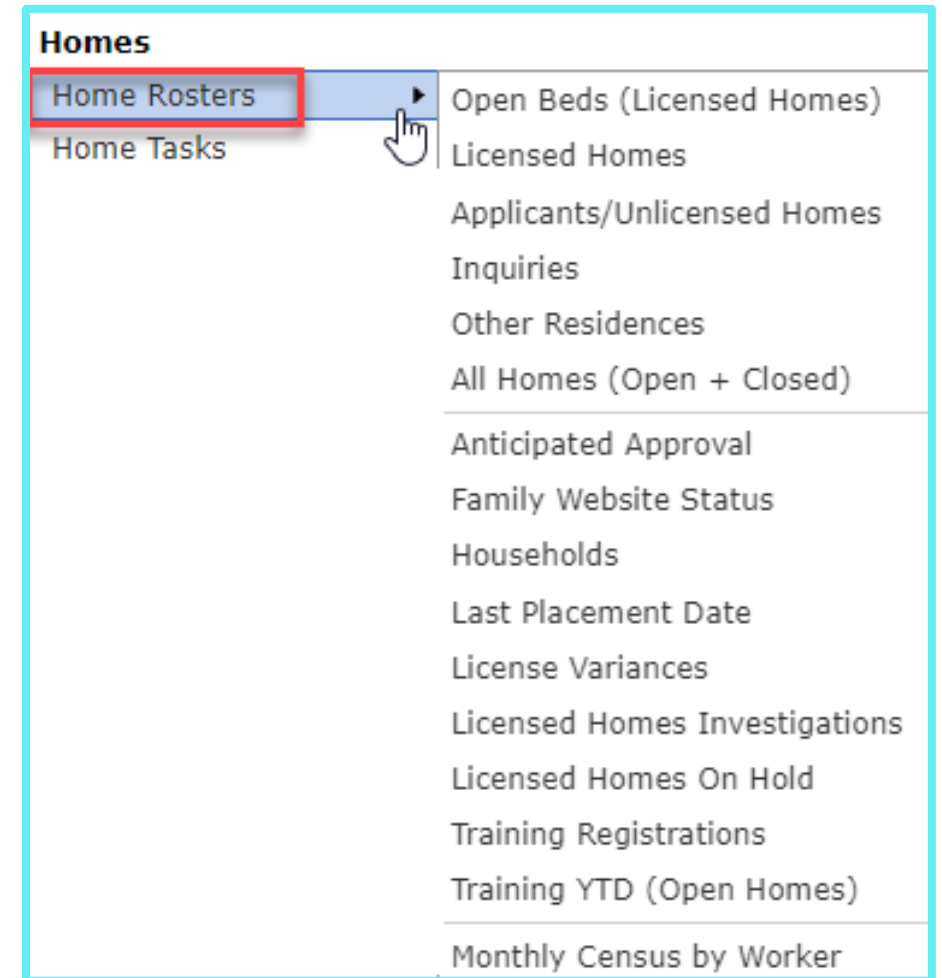
Homes > Home Rosters

- Open Beds (Licensed Homes) – Licensed Homes that have beds available for cases
- Licensed Homes – All licensed Homes
- Applicants/Unlicensed Homes – Homes that are not licensed and/or in the application stage
- Adoptive Homes – All adoptive homes
- Inquiries – Homes inquiring about becoming licensed
- Other Residences – Residences including Residential, Detention Facilities, Hospitals, Independent Living, etc.
- All Homes (Open + Closed) – All open and closed Homes
- Anticipated Approval – Applicant homes that are anticipating their approval to become licensed Homes



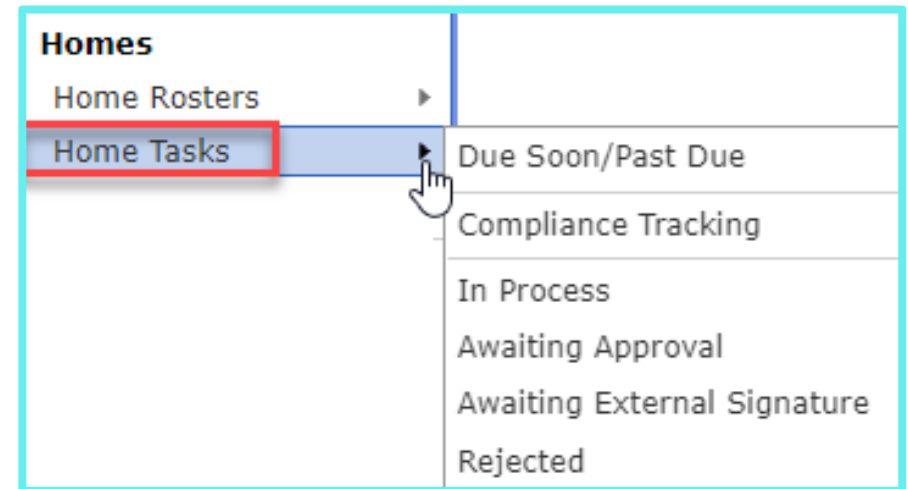
Homes > Home Rosters

- Family Website Status – Homes that have either been invited or not invited to access their Family Website
- Households – All Households which can be applicants, approved homes, etc.
- Last Placement Date – Chronological order of recent placements (in or out)
- License Variances – Any license variances with expiration dates
- Licensed Home Investigations – Homes under investigation
- Licensed Homes on Hold – All licensed homes put on hold
- Training Registrations – Homes that have registered for training
- Training YTD (Open Homes) – Year to Date training that has been attended and completed by all homes
- Monthly Census by Worker – Workers' homes by year and month



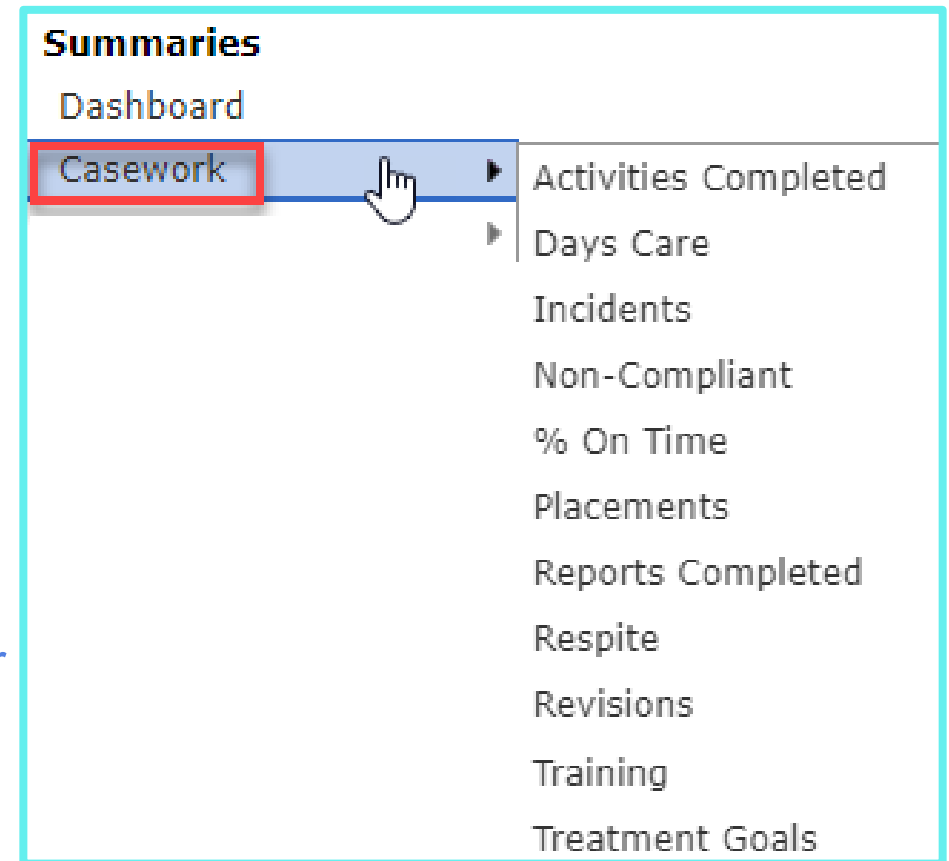
Homes > Home Tasks

- Due Soon/Past Due – All activities/reports for a Home that is due soon or past due
- Compliance Tracking – All Homes along with the items on the compliance tab that are either completed, overdue, or due soon
- Daily Activity Summary – Completion status of select daily home activities (Residential programs)
- In Process – Items that are in the process of being completed
- Awaiting Approvals – Items that are awaiting approval from a supervisor to be marked as complete
- Awaiting External Signatures (package specific) – Items awaiting external signatures
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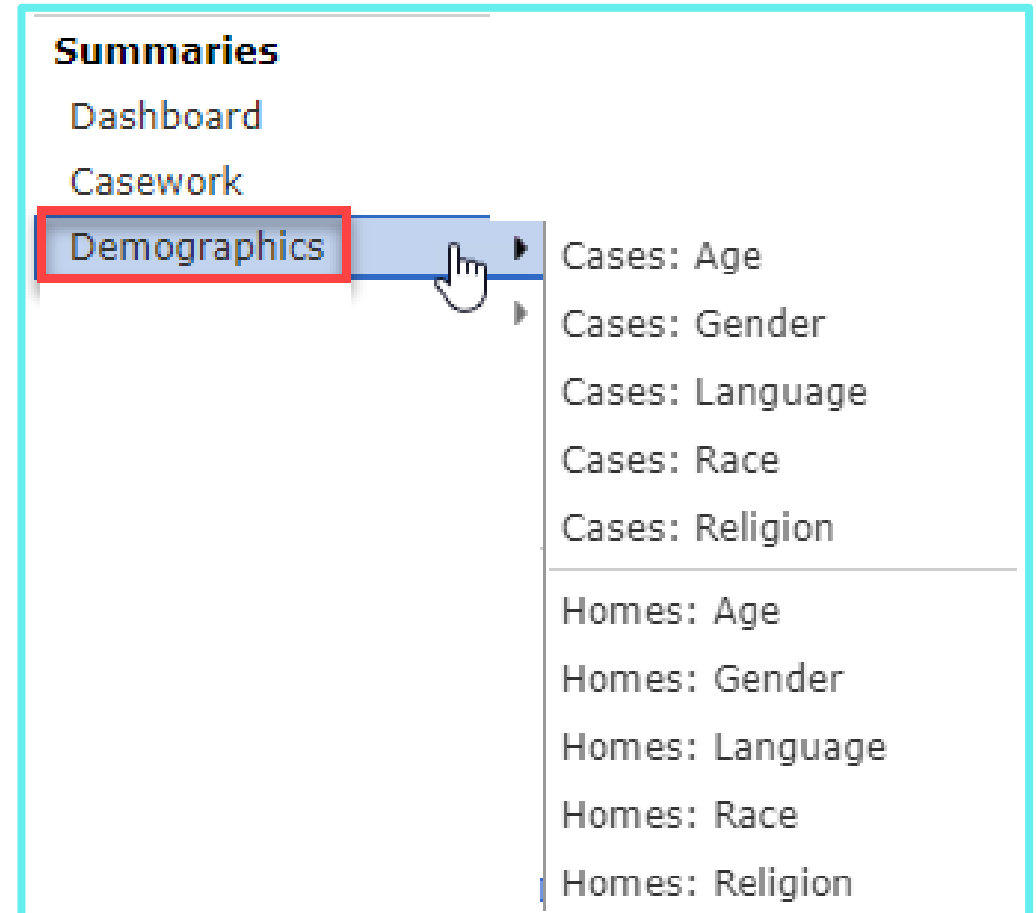
Summaries > Casework

- Activities Completed – All activities completed for a case or home – segmented by year and month
- Days Care – # days in care for each case
- Incidents – All incidents by year
- Non-Compliant – All non-compliances by year
- % On Time – % of time reports are completed on time
- Placements – # of placements each year
- Reports Completed – All completed reports each year
- Respite – All placements into respite
- Revisions – # of changes in programs, rates, etc. each year
- Training – All trainings that have been registered for and attended each year
- Treatment Goals – % of goals achieved, not achieved and pending each year



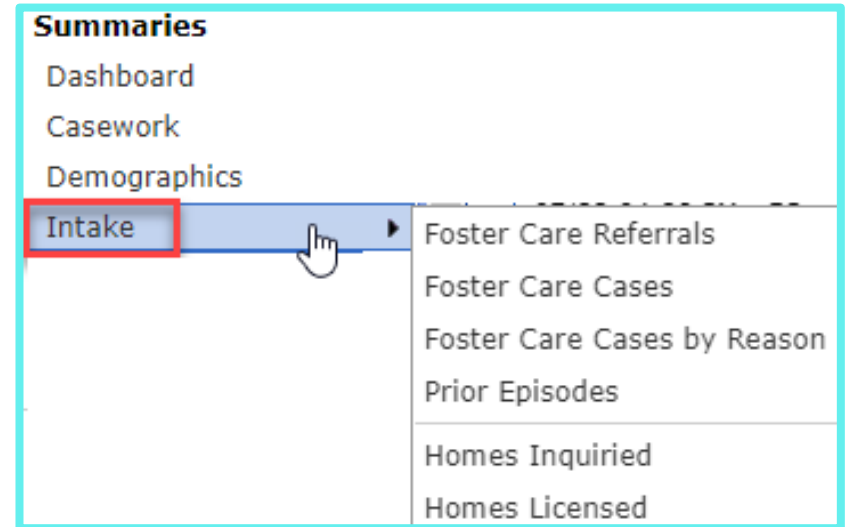
Summaries > Demographics

- Cases – segments and groups by:
 - Age
 - Gender
 - Language
 - Race
 - Religion
- Homes – segments and groups by:
 - Age
 - Gender
 - Language
 - Race
 - Religion



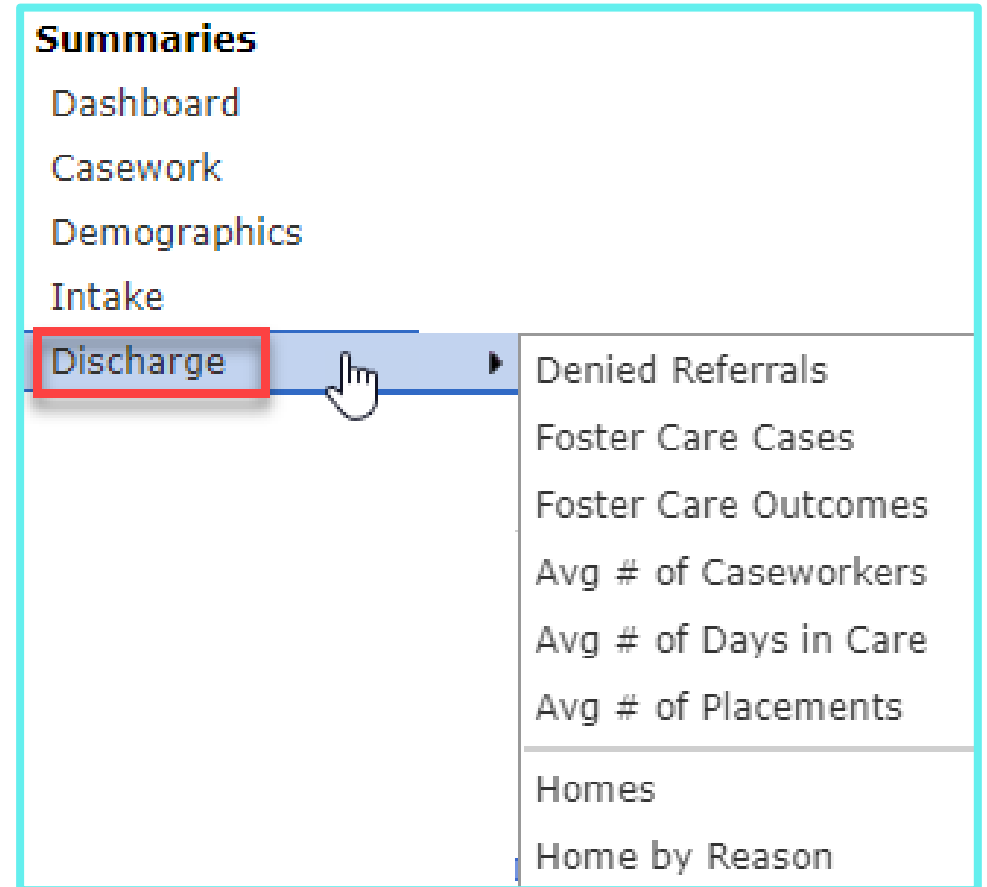
Summaries > Intake

- Referrals – # of referrals by year
- Cases – # of cases by year
- Cases by Reason – # of cases and referral reasons
- Prior Episodes – # of prior admissions and discharges for a case each year
- Homes Inquired – # of Homes that submitted inquiries each year
- Homes Licensed – # of Homes licensed each year



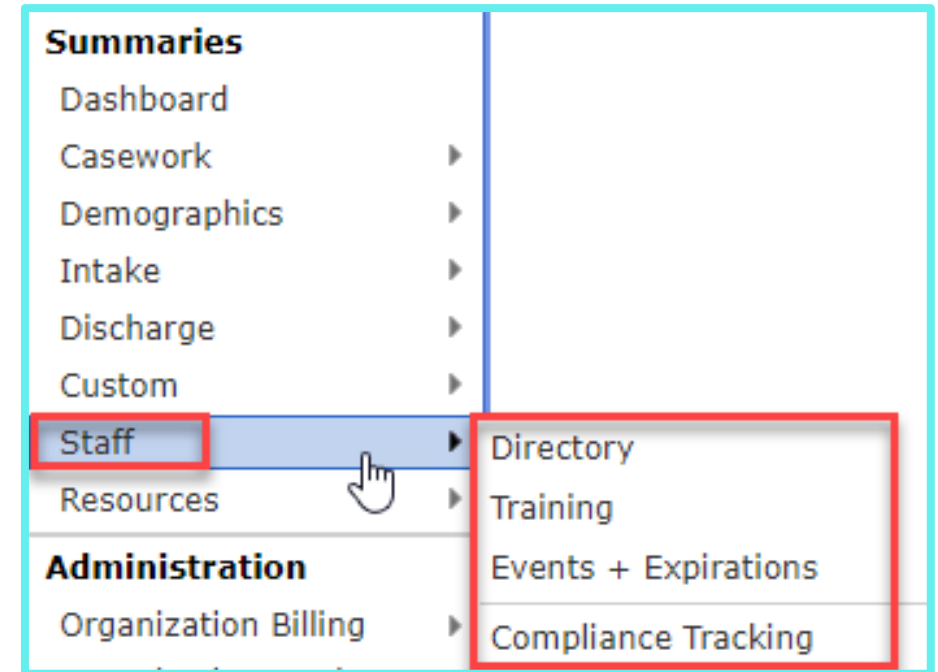
Summaries > Discharge

- Denied Referrals – # of rejected referrals by reason
- Cases – # of cases discharged each year
- Outcomes – # of cases discharged for specific reason each year
- Avg # of Caseworkers – Average # of caseworkers for a case
- Avg # of Days in Care – Average # of days spent in care
- Avg # of Placements – Average # of case placements
- Homes – # of closed Homes each year
- Home by Reason – # of closed Homes sorted by reason



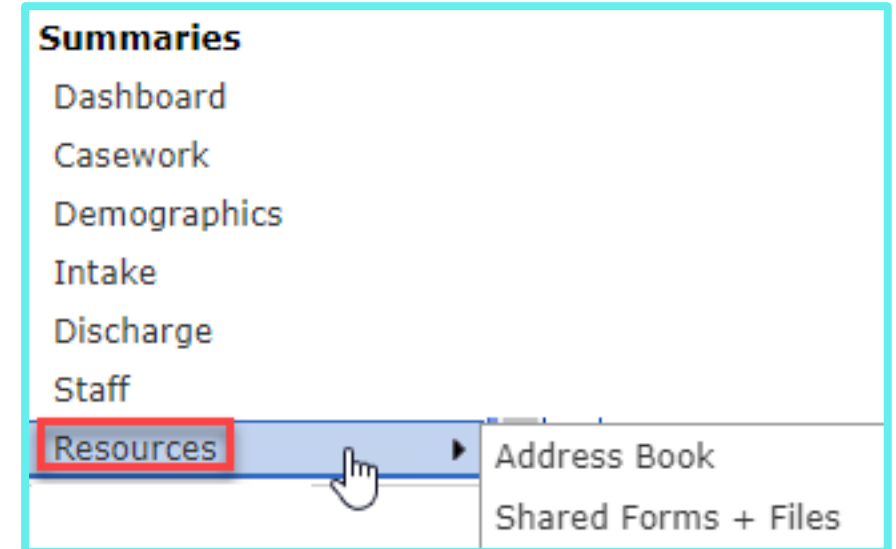
Summaries > Staff

- Directory – Provides a list of staff profiles
- Training – Lists trainings and relevant training hours completed by staff
- Events + Expirations – Lists expiration date of trainings for staff
- Compliance Tracking – Lists compliance activities that are missing or completed by staff
- NOTE – will cover in Staff Management Session.



Summaries > Resources

- Address Book
 - Includes contact information for commonly used doctors, attorneys, dentists, therapists, social workers, etc. among cases
- Shared Forms + Files
 - Centralized library of documents and forms that can be used throughout the organization and shared among cases and homes



Support Resources



Your Agency's
System
Administrator



Access the User
Guide

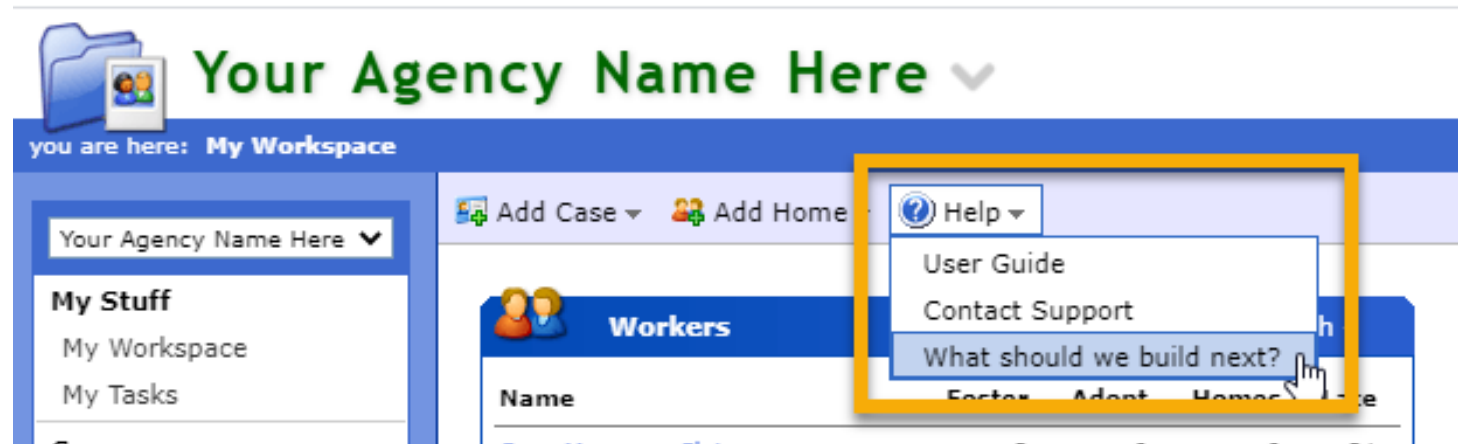
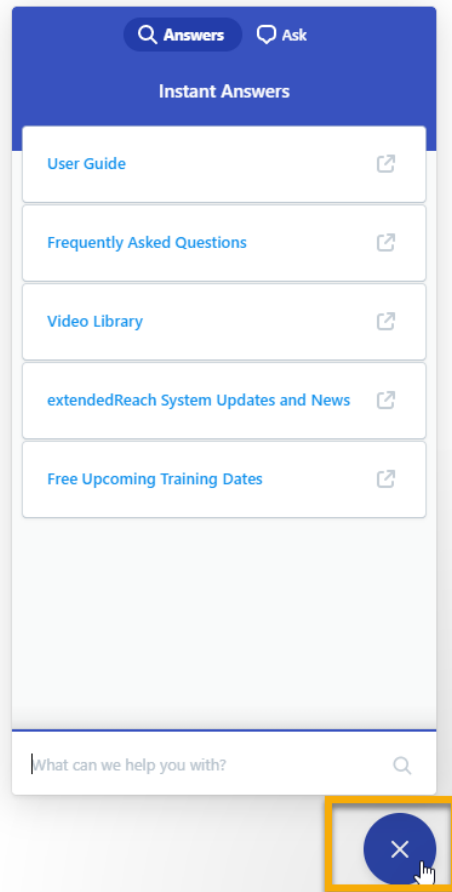


Contact Support



Submit an Idea

Support Resources



QUESTION --- & ANSWER