extendedReach powered by kcare

BASIC REPORTING

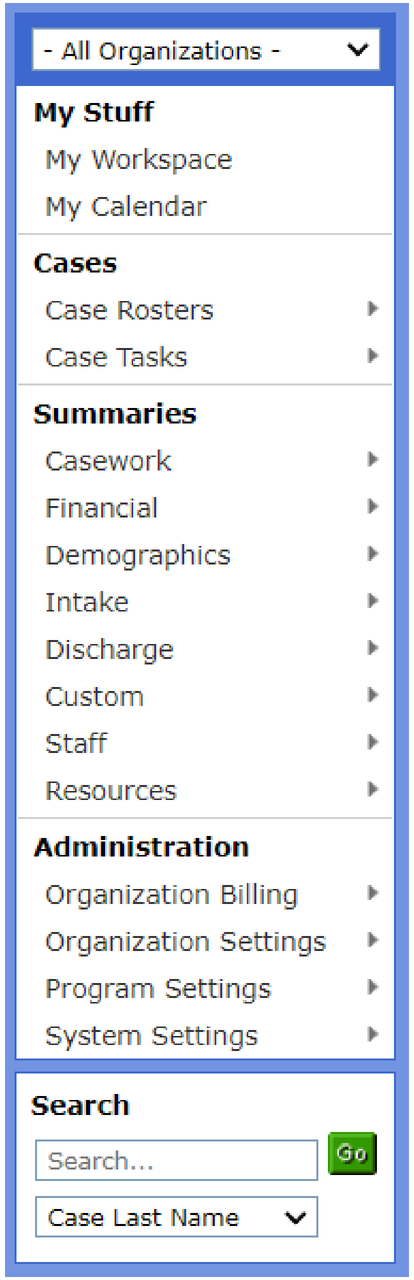
Welcome to extendedReach!

Agenda

- Basic Reports Overview
- Access
- Support Resources

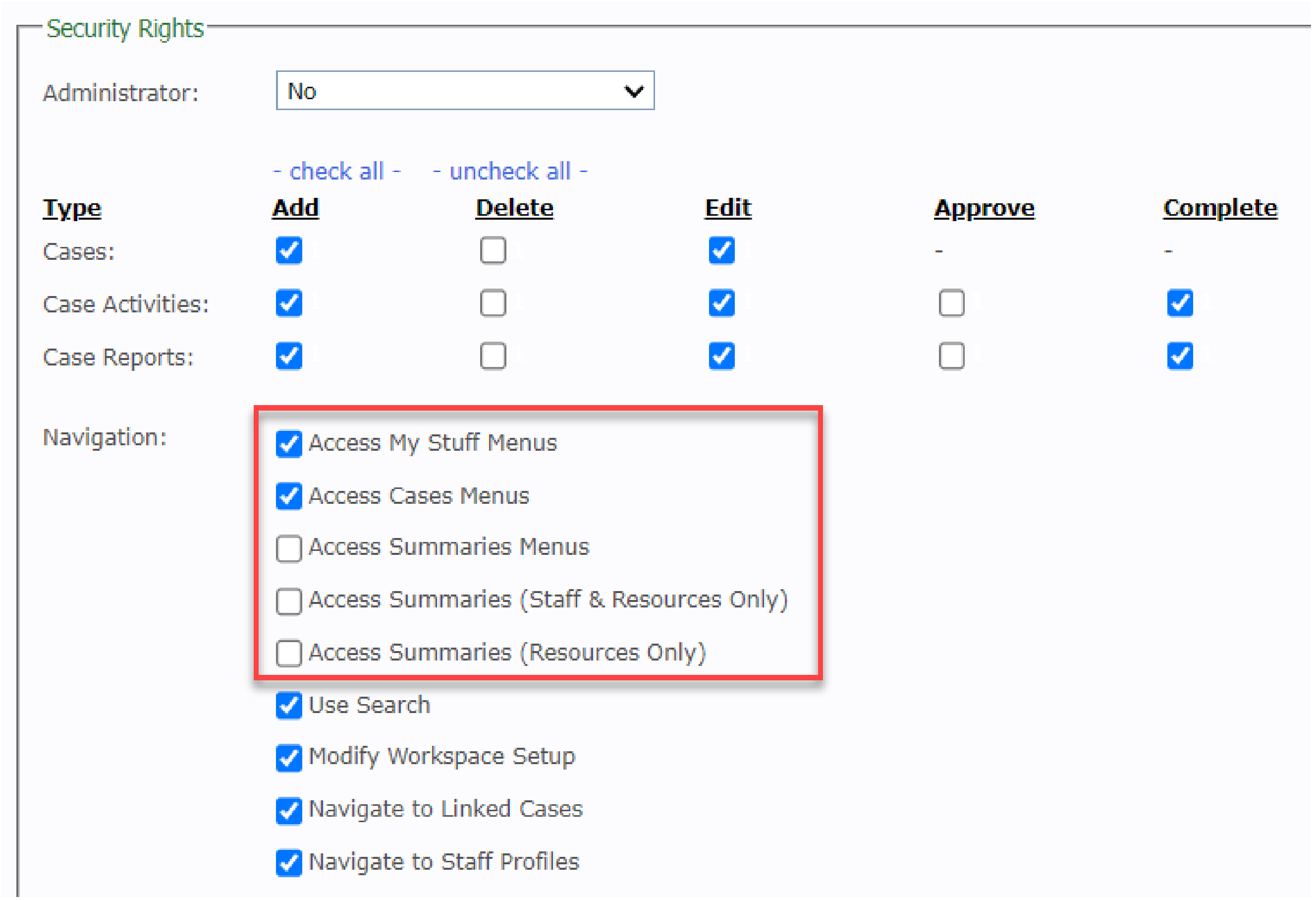
extendedReach Side Menu

- 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.



Access

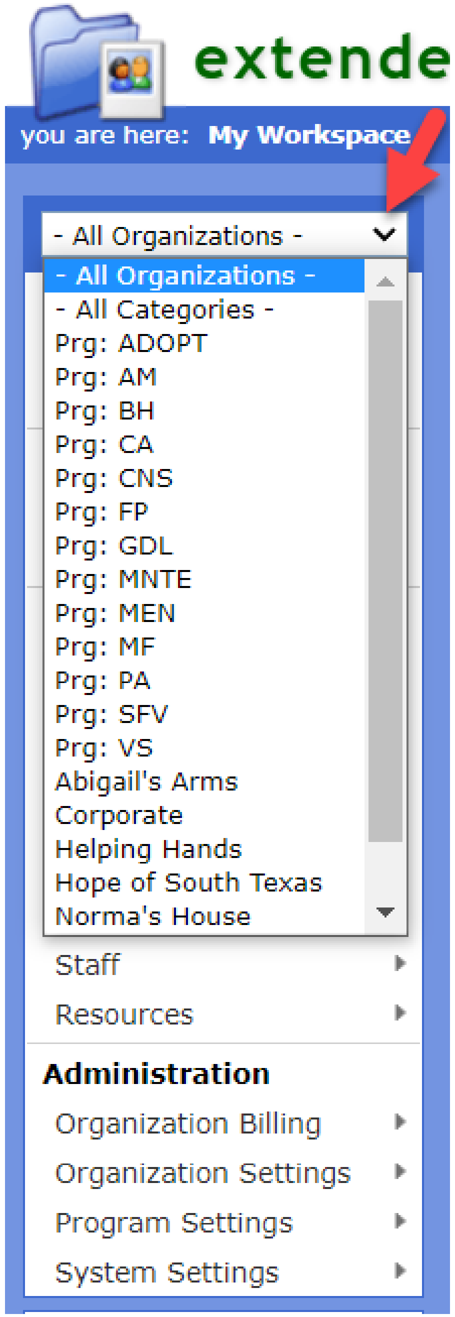
- Access to the side menu reports is given in the User ID or User Group > Security Rights > Navigation
- Access Case Menus
- Access Summaries Menus
- Access Summaries (Staff & Resources)
- Access Summaries (Resources Only)



Side Menu Actions

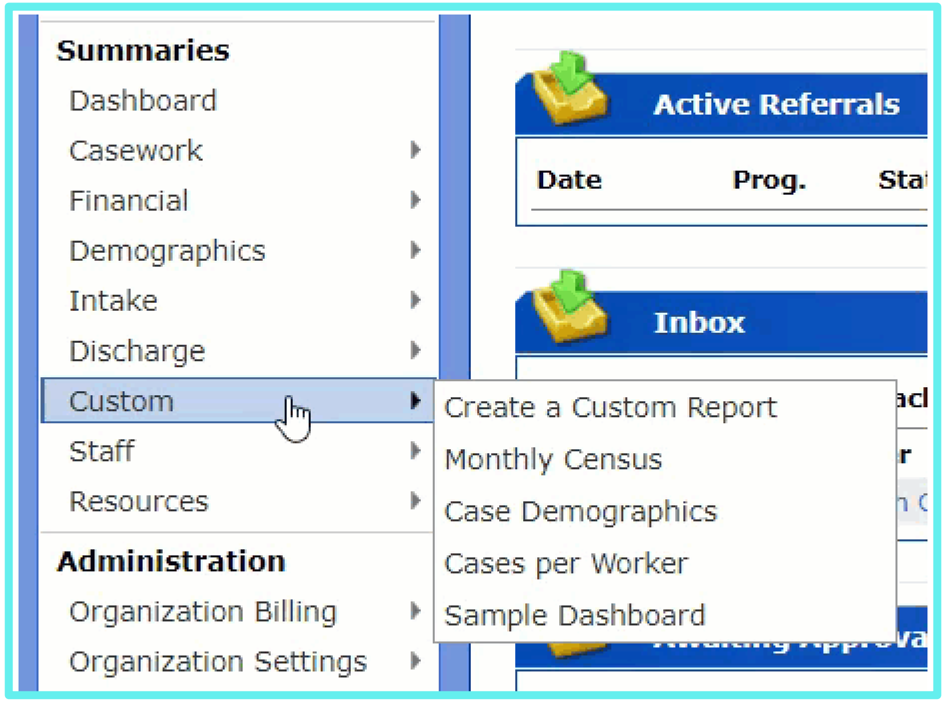
Filter Options

- Organizations can be branches, programs, or any other way you want to separate services or client types.
  - All Organizations for Agency Wide view
  - All Categories if you are using Categories
  - Select specific Organization for only those clients assigned to that Organization.
  - Select Program Name for All Program View



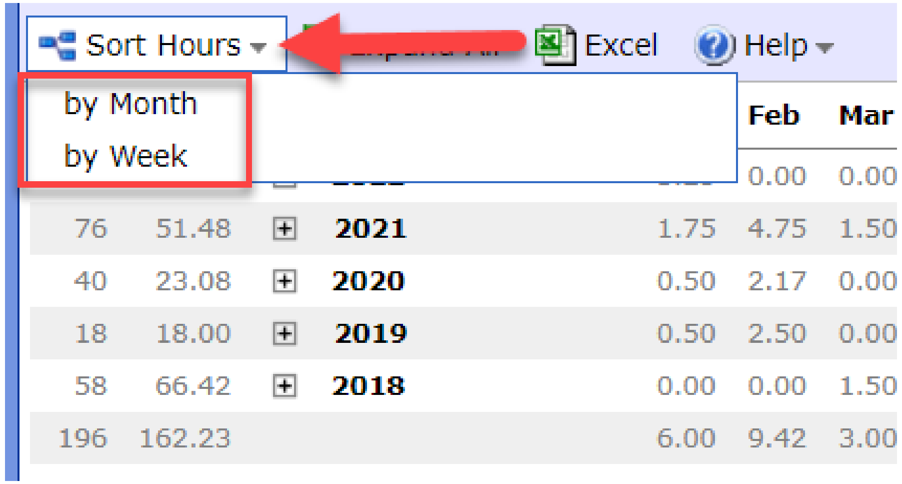
Zoho Report Builder Add-On

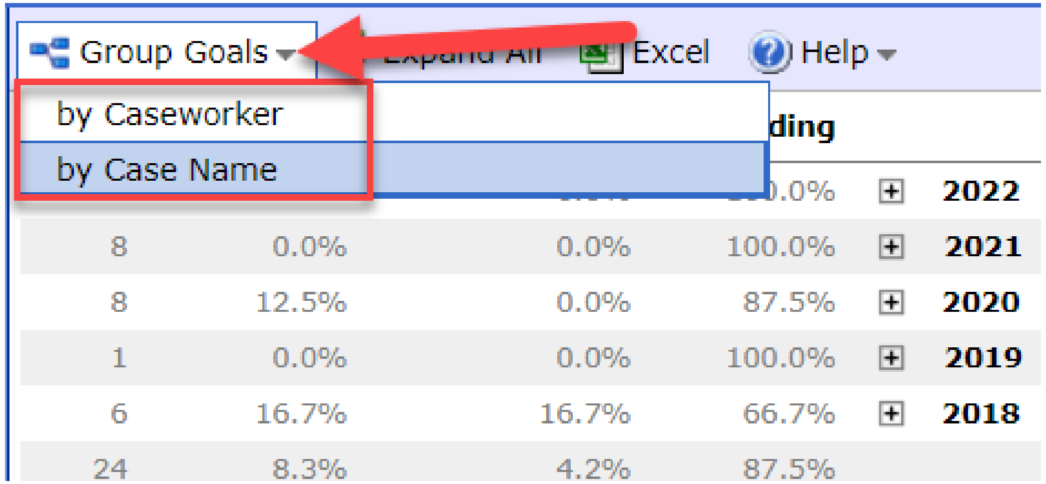
- Zoho Reports (http://reports.zoho.com) is a 3rd party custom report and dashboard builder available as an optional add-on item.
- Zoho Reports allow you to create customized reports using your data in extendedReach
- If your agency doesn't currently have this option and you are interested in learning more, please contact sales@extendedreach.com.



Reports – Group/Sort By Filter

- Many reports will have Group by and Sort by filters at the top left of the report allowing for further sorting.





Excel Download

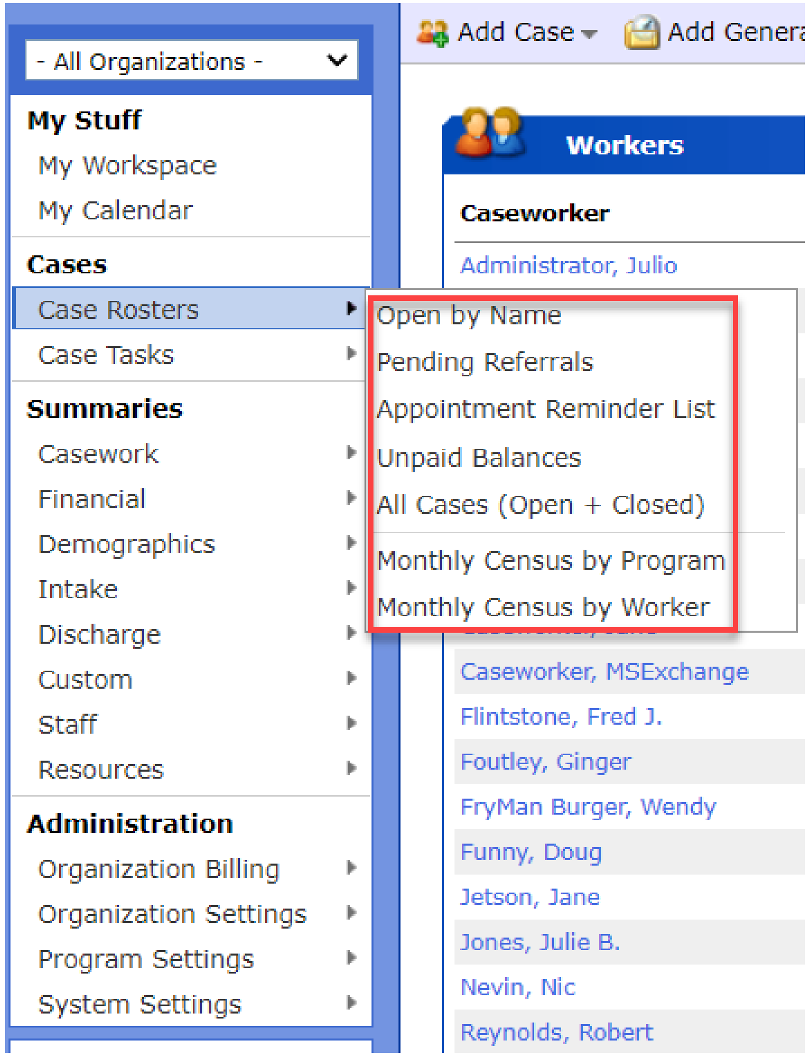
- Download reports to excel for further filtering/sorting.

Group Goals ▾ Expand All Excel Help ▾

Total	% Achieved	% Not Achieved	% Pending	
1	0.0%	0.0%	100.0%	2022
8	0.0%	0.0%	100.0%	2021
8	12.5%	0.0%	87.5%	2020
1	0.0%	0.0%	100.0%	2019
6	16.7%	16.7%	66.7%	2018
24	8.3%	4.2%	87.5%	

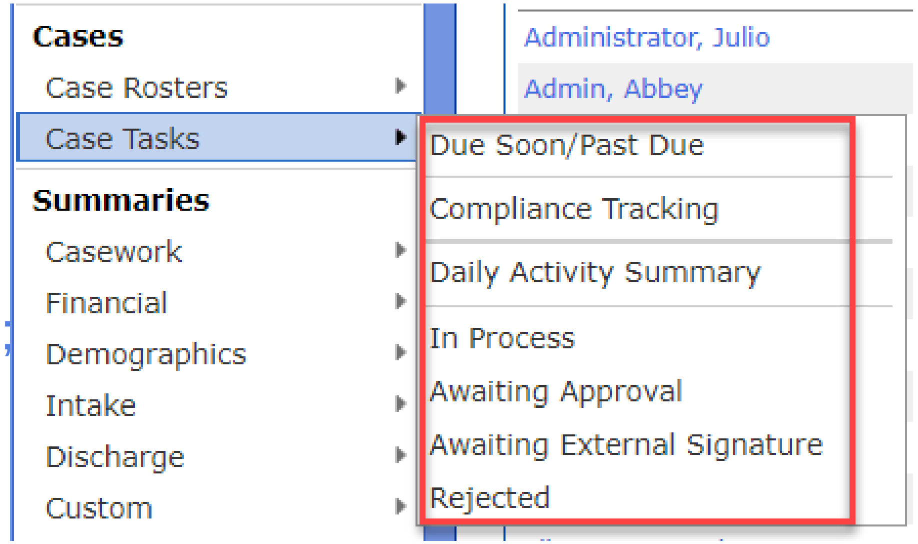
Cases > Case Rosters

- Case Roster – All active clients
- Pending Referrals – All pending and accepted referrals
- Appointments Reminder List – All scheduled appointments by date
- Unpaid Balances (Enterprise) – If using our financial management, this lists outstanding balances by client
- All Cases (Open + Closed) – Yellow folders are active clients. White folders are closed clients. You can access your discharged client records here.
- Monthly Census by Program or Worker across time



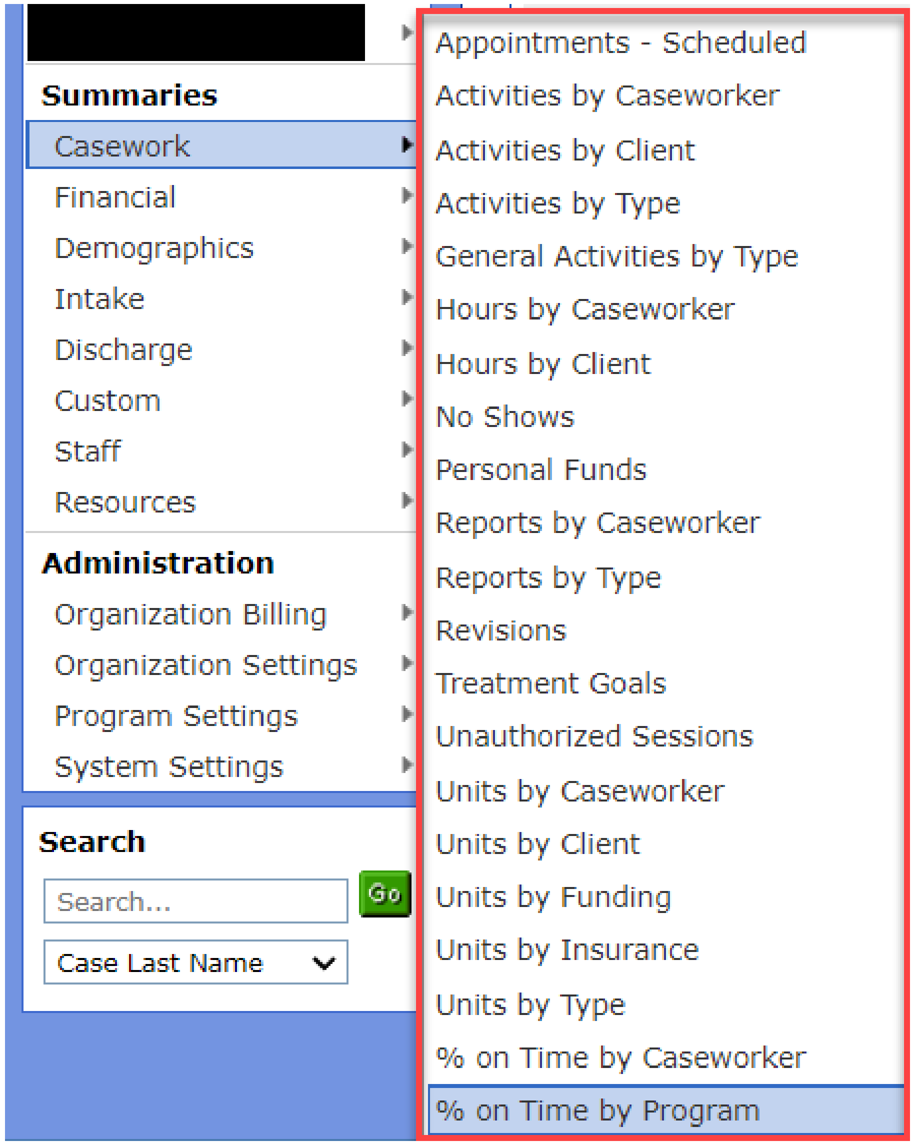
Cases > Case Tasks

- Due Soon/Past Due – all activities/reports due soon in 30 days or past due
- Compliance Tracking – all Clients along with the items on the compliance tab that are either completed, overdue, or due soon. Visual file
- 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 (Plus, Enterprise) – items awaiting external signatures
- Rejected – items rejected by approving person and returned to form creator

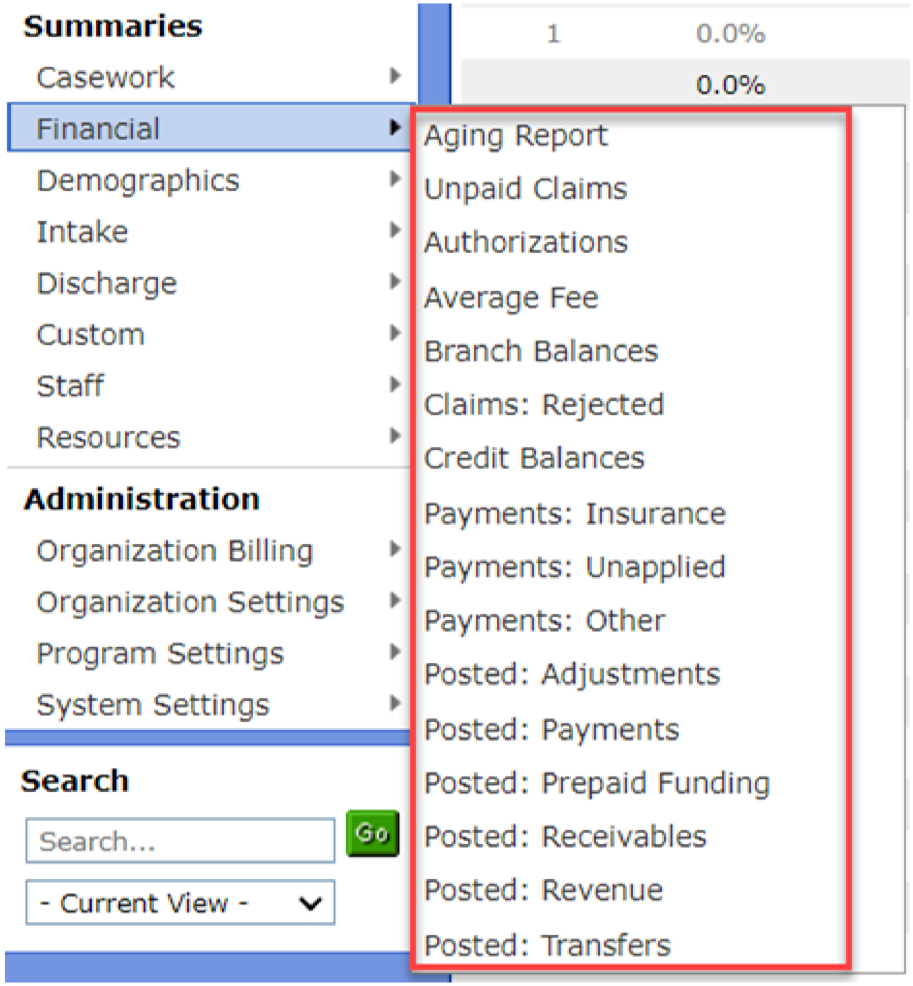


Summaries > Casework

- Reports across time (by year and month)
- Appointments Scheduled – Across Time
- Activities/Reports Completed – All activities completed for a case or home – segmented by year and month
- General Activities – Activities workers may fill out that don't live in a Client's record (supervision forms, time off, meeting attendance, etc.)
- Hours By Caseworker/Client – The amount of time spent on billable services(activities)
- No shows – If using the appointment calendar, mark your client as no show.
- Revisions – Changes to important parts of the Client record
- Treatment Goals – All goals for all clients across time
- Unauthorized Sessions – Shows billable services that are missing a valid authorization
- Units by – Billable units in different views
- % on Time – Shows % of activities/reports that are submitted on time



Summaries > Financial



Summaries > Financial

Standard Financial Reports in GCM	
Aging Report	Displays ALL outstanding balances
Unpaid Claims	Displays only outstanding Claim balances
Authorizations	Lists all active authorizations by Program
Average Fee	Average fee per units recorded
Branch Balances	Total balances of each Organization at the agency
Claims: Rejected	All claims that have been flagged Rejected (Denied)
Credit Balances	Invoices that contain overpayments
Payments: Insurance	Insurance payments received *NOT POSTED?
Payments: Unapplied	Payments received that have not been applied *NOT POSTED?
Payments: Other	Non-Insurance payments *NOT POSTED?
Posted: Adjustments	All adjustments that have been posted to the agency's billing system
Posted: Payments	All payments that have been posted to the agency's billing system
Posted: PrePaid Funding	All prepaid fundings that have been posted to the agency's billing system
Posted: Receivables	All receivables that have been posted to the agency's billing system
Posted: Revenue	All revenue generated from activities
Posted: Transfers	All transfers that have been posted to the agency's billing system

Summaries > Aging Report

- This aging invoice report lists the invoice totals in separate columns, helping to differentiate between the total balance, current balance, aging as of 30+ days, 60+ days, 90+ days and 120+ days. This view shows all open invoices and unapplied payment credits. It includes services with or without an associated Claim.

Group by | Aging Report as of Date | Expand All | Excel | Help

Total Balance	Current	30+ Days	60+ Days	90+ Days	120+ Days	Type	Ref #	Date	Bill To/Client Name	Service Date(s)	Caseworker(s)	Organization	Notes / Comments
($1.00)	$0.00	$0.00	$0.00	$0.00	($1.00)	**Adoption**							
$253.58	$0.00	$0.00	$253.58	$0.00	$0.00	**Alcohol Treatment**							
$100.00	$0.00	$0.00	$0.00	$0.00	$100.00	**Anger Management**							
$19,021.26	$0.00	$0.00	$100.00	$600.00	$18,321.26	**Behavioral Health**							
$4,960.89	$0.00	$0.00	$1,084.25	$48.50	$3,828.14	**Counseling**							
$523.95	$0.00	$0.00	$523.95	$0.00	$0.00	**Drug Treatment**							
$757.96	$0.00	$0.00	$0.00	$0.00	$757.96	**Family Preservation**							
$5,056.00	$0.00	$0.00	$0.00	$0.00	$5,056.00	**Parent Aide**							
$200.00	$0.00	$0.00	$0.00	$0.00	$200.00	**Supervised Family Visitation**							
$5.00	$0.00	$0.00	$5.00	$0.00	$0.00	**Treatment Foster Care**							
$6,750.00	$6,620.00	$130.00	$0.00	$0.00	$0.00	**Work Study**							
$37,627.64	$6,620.00	$130.00	$1,966.78	$648.50	$28,262.36								

Summaries > Unpaid Claims

Unpaid Claims

This aging claims report list the claim totals in separate columns, helping to differentiate between the total balance, current balance, aging as of 30+ days, 60+ days, 90+ days and 120+ days. This report only shows balances associated with open, unpaid claims.

Group by Excel Help

Total	Current	30+ Days	60+ Days	90+ Days	120+ Days		Claim Date	Service Date(s)	Organization	Client Name
$298.58	$0.00	$0.00	$163.58	$135.00	$0.00	Alcohol Treatment				
$35.00	$0.00	$0.00	$35.00	$0.00	$0.00	Aetna				
$35.00	$0.00	$0.00	$35.00	$0.00	$0.00	C. 60 Days				
$35.00			$35.00				12/02/2021	11/30/2021	Choices Alcohol & Drug	Scott, Camron
$263.58	$0.00	$0.00	$128.58	$135.00	$0.00	Amerigroup				
$128.58	$0.00	$0.00	$128.58	$0.00	$0.00	C. 60 Days				
$64.29			$64.29				11/19/2021	11/20/2021	Choices Alcohol & Drug	Hart, Zoey
$64.29			$64.29				11/10/2021	11/10/2021	Choices Alcohol & Drug	Tyme, Justin
$135.00	$0.00	$0.00	$0.00	$135.00	$0.00	D. 90+ Days				
$35.00				$35.00			11/04/2021	11/04/2021	Choices Alcohol & Drug	Hart, Lisa
$100.00				$100.00			11/04/2021	11/04/2021	Choices Alcohol & Drug	Hart, Zoey

This view can be exported to Excel, or grouped by Client Name, Date or Payer (Current Payer on Claim).

Summaries > Authorizations

Authorizations

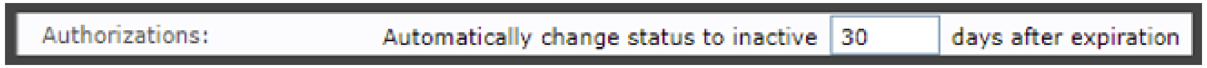
This report displays any active authorizations grouped by Program for current clients only. For purposes of this report, active means the auth still has a remaining balance available and has not been moved to Inactive status.

Additional sorting options include:

- Active By Date
- Active by Date Expiring
- Active by Name
- Active by Balance
- Pending by Date

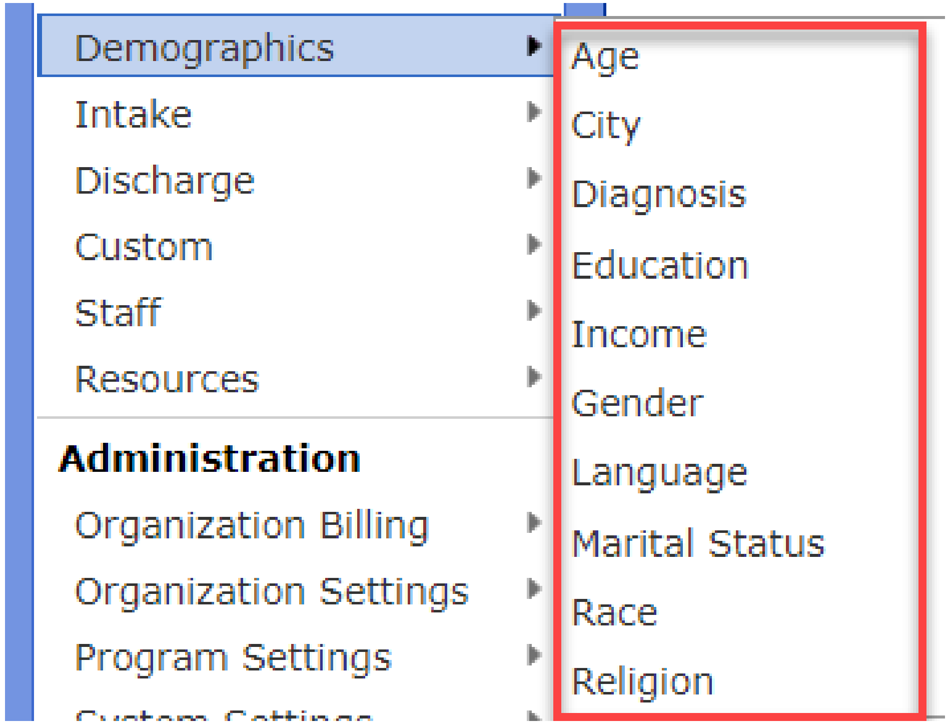
This data can also be exported to Excel.

**Note: Active vs Inactive authorization in not determined by Date Expiring but by status change. Once an Authorization is moved to Inactive, any remaining units on that Auth are no longer available for use. Under System Settings> System Configuration your agency can control preferences for how long an Auth should stay active after the expiration date. Closed Authorizations can be made Active/Inactive by editing the Auth.



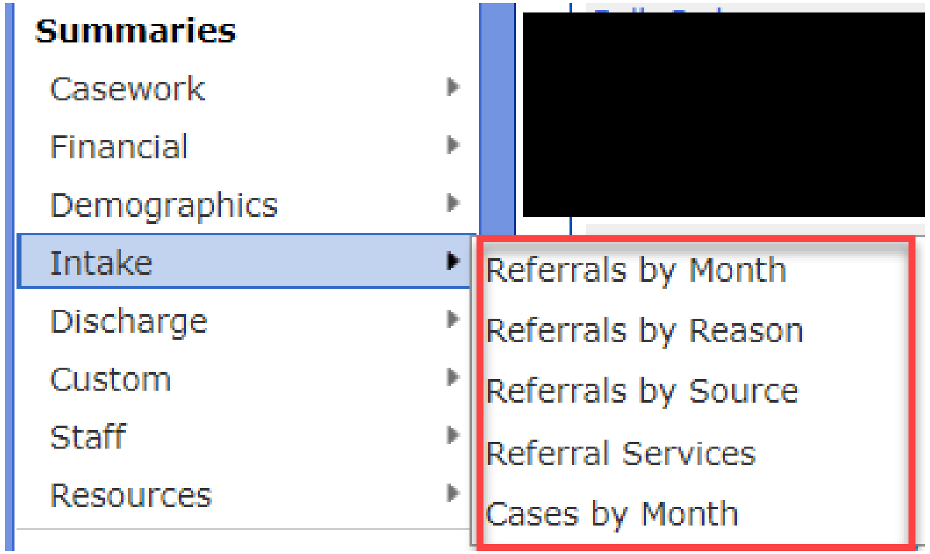
Summaries > Demographics

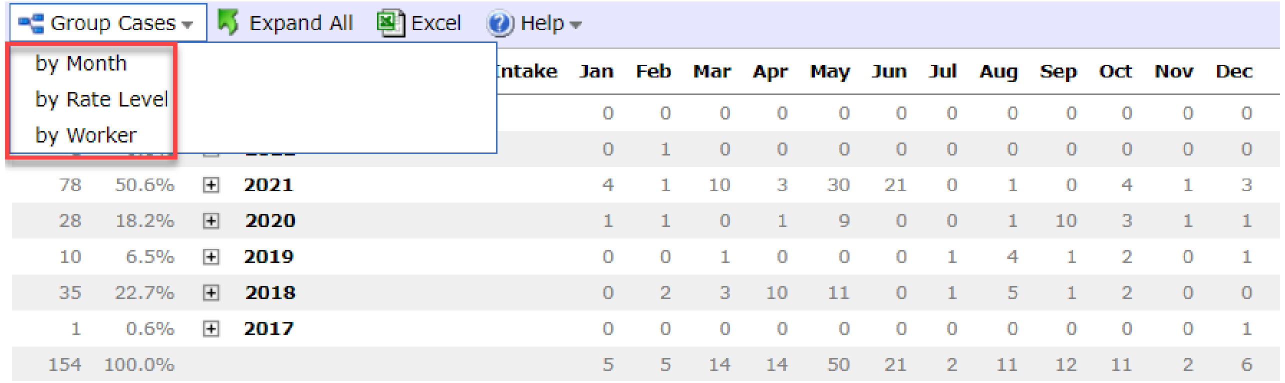
- Case Demographics



Summaries > Intake

- Referrals - Sort by Month, Reason, Source, or Services
- Cases by month across time

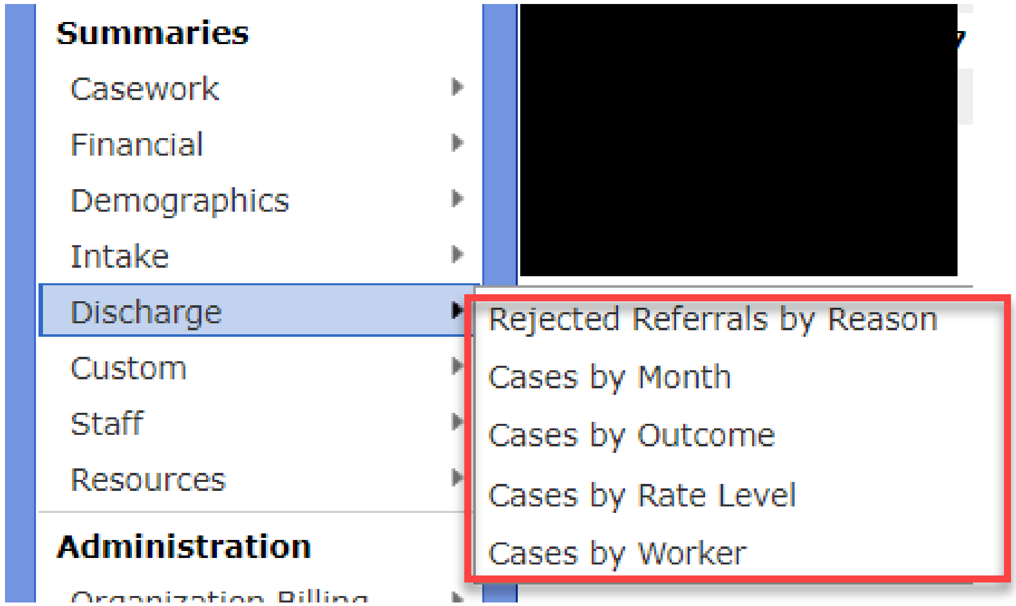




			ntake	Jan	Feb	Mar	Apr	May	Jun	Jul	Aug	Sep	Oct	Nov	Dec
				0	0	0	0	0	0	0	0	0	0	0	0
				0	1	0	0	0	0	0	0	0	0	0	0
78	50.6%	+	**2021**	4	1	10	3	30	21	0	1	0	4	1	3
28	18.2%	+	**2020**	1	1	0	1	9	0	0	1	10	3	1	1
10	6.5%	+	**2019**	0	0	1	0	0	0	1	4	1	2	0	1
35	22.7%	+	**2018**	0	2	3	10	11	0	1	5	1	2	0	0
1	0.6%	+	**2017**	0	0	0	0	0	0	0	0	0	0	0	1
154	100.0%			5	5	14	14	50	21	2	11	12	11	2	6

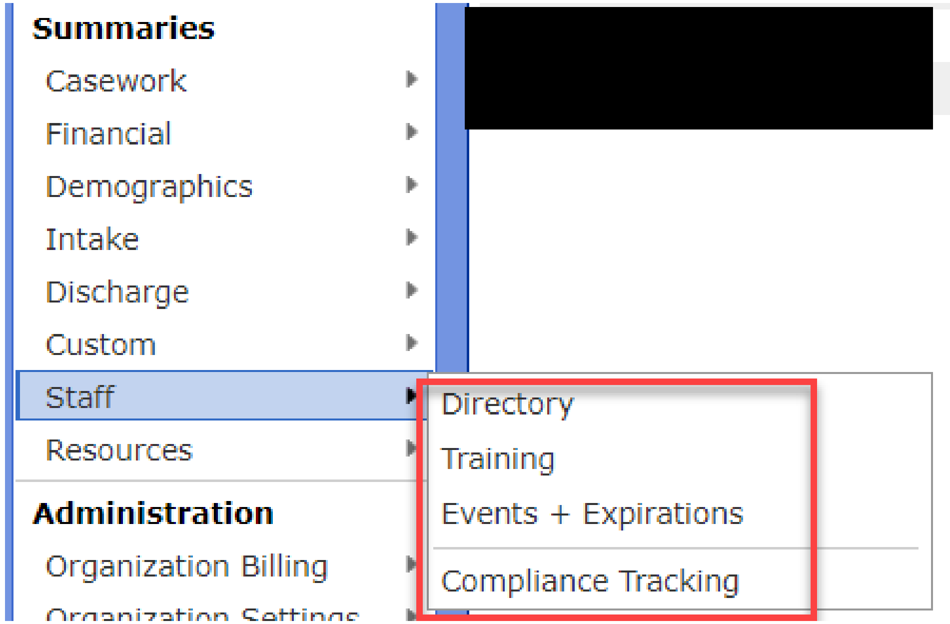
Summaries > Discharge

- Rejected Referrals – # of rejected referrals by reason across time across time
- Cases – # of cases discharged each month across time
- Outcomes – # of cases discharged for specific reason each year across
- Cases - # of cases discharged by Rate Level
- Cases - # of cases discharged by Worker



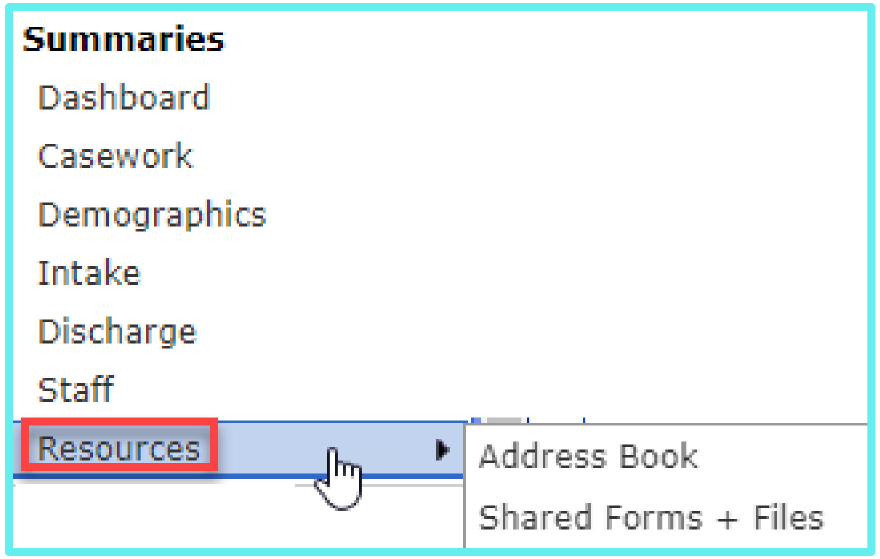
Summaries > Staff

- Directory – Provides a list of staff profiles
- Training – Add training for multiple staff at once. Lists trainings and relevant training hours completed by staff by year.
- Events + Expirations – Lists expiration date of documents & trainings for staff
- Compliance Tracking – Visual view of each Staff's record.



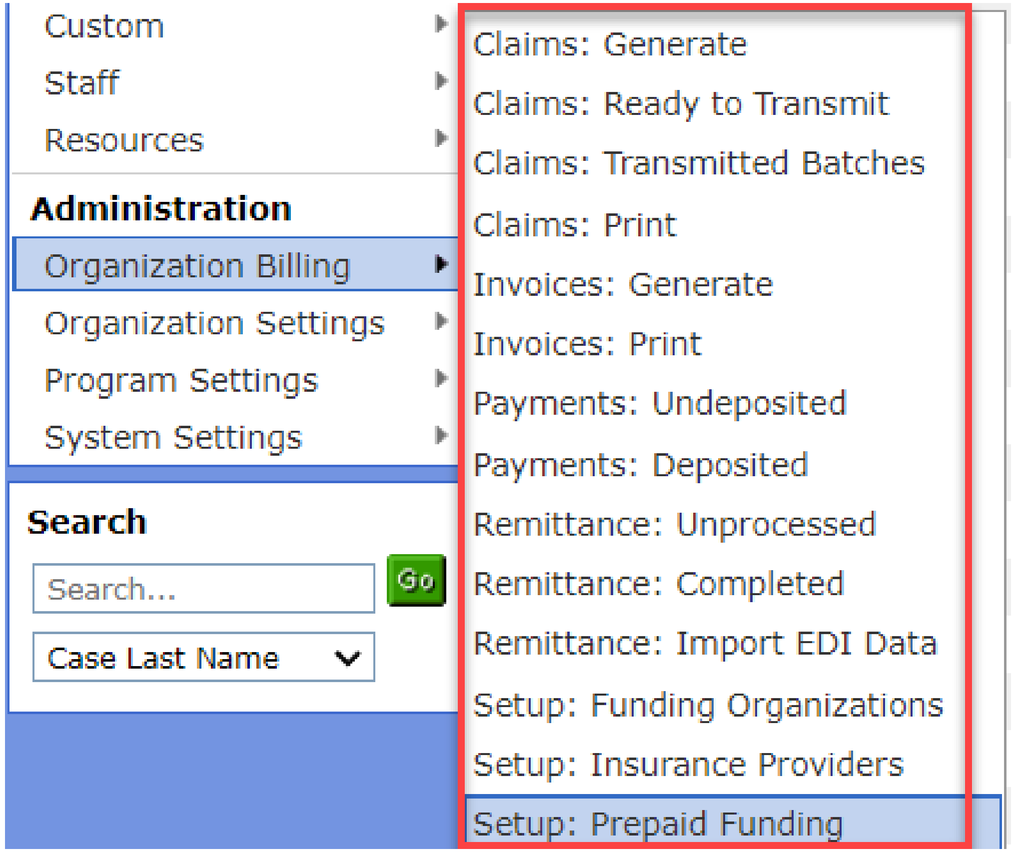
Summaries > Resources

- 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



Administration > Organization Billing

- Enterprise Reports for Claims management
- Payments – Deposited and Undeposited
- Remittance – Unprocessed, Completed, Import EDI Data
- Set Up – Insurance Providers or Prepaid funding



Support Resources

Your Agency's System Administrator

Access the User Guide

Submit a Support Ticket

Contact your Customer Success Manager

Submit an Idea

Support Resources