MODULE 4: REPORTING

BlueCare Tennessee Employment and Community First EVV Program
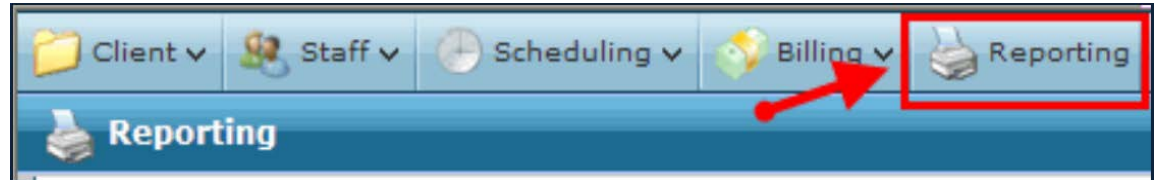
March, 2018

TOPICS

1. Accessing & Running Reports
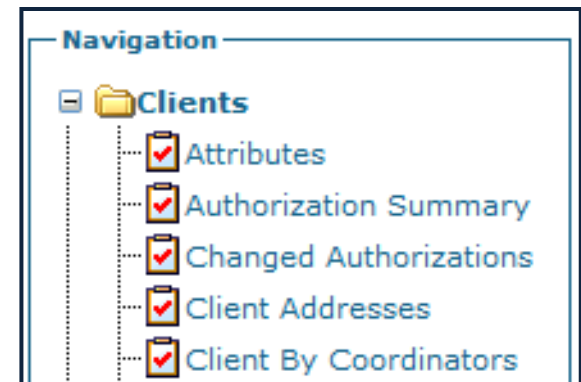2. Commonly Used Reports

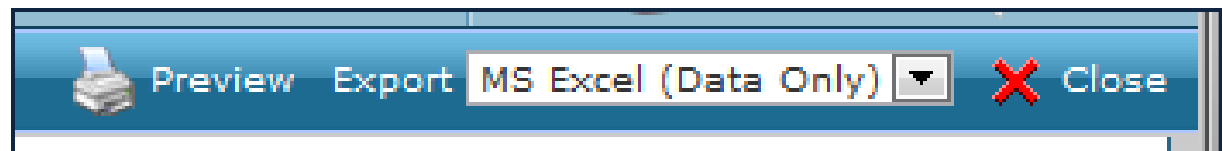# Accessing & Running Reports

1. Click **Reporting.**

2. Select a report from Navigation panel.

3. Specify filters as needed (each report has different filter options).

4. View Report

   ◆ Click **Preview** to view a PDF version.

   ◆ Or choose a format and click **Export**.

Clients List - with last scheduled date

Name	Chart ID	ROC	SOC	Last Scheduled	Status	Perm Schedule
A, Sandra	M0000009057-HH	3/31/2011	3/23/2011	6/29/2012	03-Hold	
B, Leo	M0000006275-HH	9/28/2011	9/17/2011	7/21/2012	02-Active	
C, Michael	M0000006379-HH	3/11/2011	3/3/2011	6/26/2012	02-Active	
D, Mary	M0000008411-HH	6/27/2010	7/1/2010	6/7/2012	02-Active	
D, Marie	M0000003077-HH	5/16/2011	5/6/2011	7/3/2012	02-Active	
L, Elizabeth	M0000002849-HH	6/14/2010	7/1/2010	7/12/2012	02-Active	
M, Peter	M0000002567-HH	5/23/2011	5/14/2011	7/4/2012	02-Active	
P, Charles	M0000008071-HH	3/16/2011	2/24/2011	6/23/2012	02-Active	
P, Fred	M0000003869-HH	6/8/2010	7/1/2010	6/28/2012	02-Active	
R, Henry	M0000001391-HH	9/8/2011	8/26/2011	12/25/2011	02-Active	
S, Marvin	M0000009381-HH	8/10/2010	7/29/2010	7/22/2012	02-Active	
S, Carol	M0000003945-HH	7/6/2010	7/1/2010	8/11/2012	02-Active	
W, Ruth	M0000003293-HH	6/12/2010	7/1/2010	6/31/2012	02-Active	

Total: 13

Clients List - with last scheduled date   7/23/2012 2:32:29PM   Page 1 of 3

◆ Staff Reports

- Staff Address List

- Staff Mailing Labels

- Staff List by Hire Date

- Staff Availability

- Non-Compliant Staff Report – Detail

◆ Client Reports

- Authorization Summary

- Client Addresses

- Clients by Coordinator

- Client Phone List

- Expiring Authorizations

- Holds by Reason

Accessing & Running Reports

◆ Scheduling Reports

- Calendar by Client
- Calendar by Staff
- Schedules by Client
- Schedules by Staff
- Schedules by Date

◆ Santrax Reports

- Santrax Individual Client Activity
- Santrax Individual Staff Activity
- Santrax Maintenance

◆ Billing Reports

- Activity Report Summary

- Billing Audit Sheet

- Billing Entries

- Billing Entry Journal

- Claim Detail Report

◆ Other Reports

- Notes by Category – Includes any 'Yes' responses by the attendant to the Assessment questions answered when checking-out for a visit on the device. BlueCare will call the Provider to discuss the 'Yes' responses so this report is helpful in preparing for the call.

THANK YOU FOR YOUR TIME!