

New Feature Demo

October 15, 2024



Agenda

- ▶ Employee Care Integration with Relias
- ▶ New Messaging Dynamic Groups
- ▶ Request Substitute
- ▶ Business Intelligence and Analytics for I/DD



Relias Integration with Employee Care

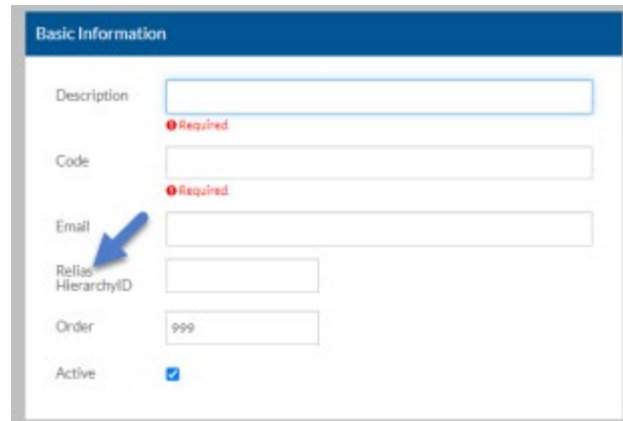


Relias Integration

- ▶ Agencies that use Relias for their training solution can automatically :
 - ▶ Push employment information from Employee Care to Relias to create users in Relias if desired.
 - ▶ Pull in completed requirements from Relias into Employee Care overnight to mark them fulfilled.
- ▶ If you would like to explore integration with Relias, contact support to schedule this new feature to be turned on in your database.
- ▶ You will also need to work with your contact at Relias. There may be an additional fee from Relias.

Hierarchy IDs

- ▶ You can use Hierarchy IDs to categorize employees into groups.
- ▶ Assign the Relias Hierarchy ID to an Employee Care Group (HR Group)
- ▶ Assign the Group to an employee



The screenshot shows a 'Basic Information' form with the following fields:

- Description: (Required)
- Code: (Required)
- Email: (indicated by a blue arrow)
- Relias HierarchyID:
- Order:
- Active:

Employment File Configuration

- ▶ Use special Relias Employee Export data object found under Payroll
- ▶ Make a copy of the Relias Export Default File layout
- ▶ Adjust the file as need (work with your Relias Rep)
- ▶ The file is based on the Relias Specification

The first screenshot, titled 'New Report', shows a list of data objects. A blue arrow points to 'Relias Employee Export' under the 'Payroll' category.

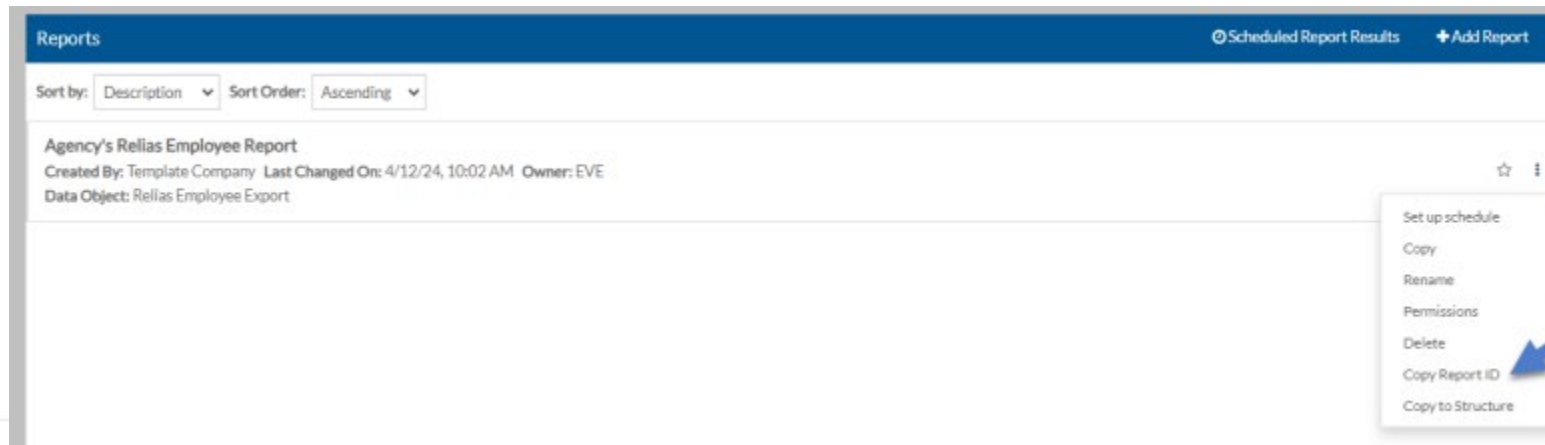
The second screenshot, titled 'Select report layout', shows a search for 'Relias Export Default File'. A blue arrow points to the 'Copy' button next to the search result.

The third screenshot, titled 'Configure and run', shows a table of columns to be displayed. A blue arrow points to the 'OrgCode' row.

| Column | Visible | Hidden | Selected |
|------------------|--------------------------|--------------------------|-------------------------------------|
| Entry type | <input type="checkbox"/> | <input type="checkbox"/> | <input type="checkbox"/> |
| OrgID | <input type="checkbox"/> | <input type="checkbox"/> | <input type="checkbox"/> |
| OrgCode | <input type="checkbox"/> | <input type="checkbox"/> | <input checked="" type="checkbox"/> |
| Last Name | <input type="checkbox"/> | <input type="checkbox"/> | <input type="checkbox"/> |
| First Name | <input type="checkbox"/> | <input type="checkbox"/> | <input type="checkbox"/> |
| User Name | <input type="checkbox"/> | <input type="checkbox"/> | <input type="checkbox"/> |
| Password | <input type="checkbox"/> | <input type="checkbox"/> | <input type="checkbox"/> |
| GUID | <input type="checkbox"/> | <input type="checkbox"/> | <input type="checkbox"/> |
| Employee ID | <input type="checkbox"/> | <input type="checkbox"/> | <input type="checkbox"/> |
| Hire Date | <input type="checkbox"/> | <input type="checkbox"/> | <input type="checkbox"/> |
| Termination Date | <input type="checkbox"/> | <input type="checkbox"/> | <input type="checkbox"/> |
| Email | <input type="checkbox"/> | <input type="checkbox"/> | <input type="checkbox"/> |
| Job Title | <input type="checkbox"/> | <input type="checkbox"/> | <input type="checkbox"/> |
| Department | <input type="checkbox"/> | <input type="checkbox"/> | <input type="checkbox"/> |

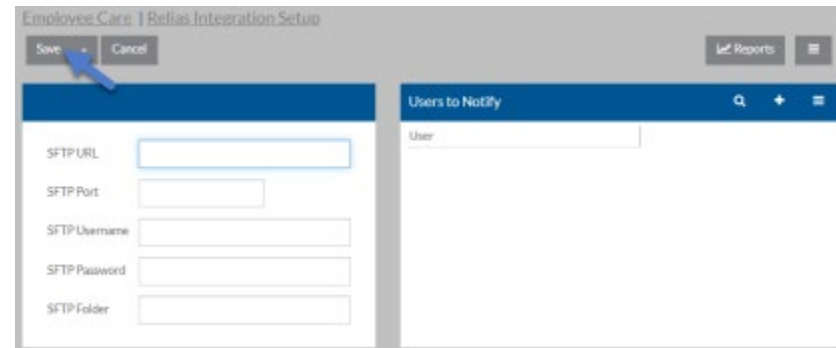
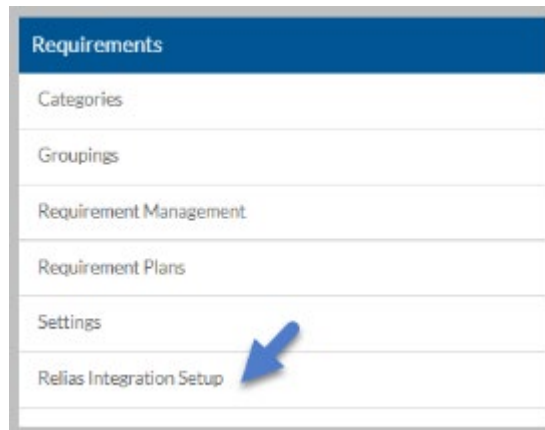
Employment File Configuration

- ▶ Create a report using the new copied layout
- ▶ Save report with appropriate settings
- ▶ Adjust the file as need (work with your Relias Rep)
- ▶ Send file to Relias for testing.
- ▶ Copy Report ID and send it to Sandata so the overnight push to Relias can be scheduled

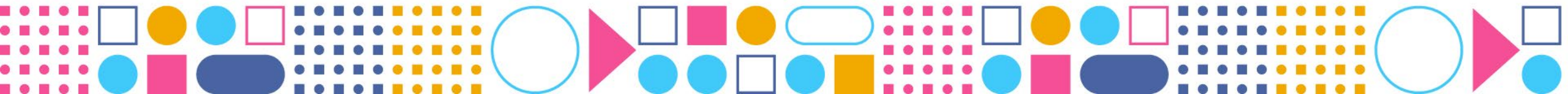


Fulfilling Requirements from Relias

- ▶ Requirement in Employee Care cannot be set for manual expiration.
- ▶ Employee Code in Employee Care must match the employee identifier in Relias The Requirement Code in Employee Care must match the Relias requirement numerical codes
- ▶ Provide Relias with the Sandata Excel Fulfilled Requirement Import Template
- ▶ Set up Relias Integration configuration



New Dynamic Groups in Message Center



All Managers Group

- ▶ Sends a message or an alert to anyone in a Position that has the Manager check box selected.

The screenshot displays a web application interface for managing positions. At the top, there are navigation links for 'Employee Care', 'Positions', and 'Art Voc Center Manager'. On the right side, there are buttons for 'Reports', 'Delete', 'Add Copy', and a menu icon. The main content is divided into two panels: 'Basic Information' and 'Employment Information', both with 'Edit' links.

Basic Information

| | |
|---------------|-------------------------------------|
| Description | Art Voc Center Manager |
| Active | <input checked="" type="checkbox"/> |
| Position Type | Manager |
| Filled By | Snyder, Laura (000222) |

Employment Information

If Employment Tracking is enabled and Sync Primary Position Information to Employee is enabled in Positions and Placement Option, the information below will sync to the filled by employee's record if it is their primary position/managed position.

| | | | | |
|-------------------------|----------------------------------|------------------------------|-------------------------------------|------------------------|
| Work Status | Full-Time | Director | <input type="checkbox"/> | Position Counts |
| FTE | 0.50 | Manager | <input checked="" type="checkbox"/> | Direct Subordinates |
| Cost Center | Art Voc Center (3001) | Exempt | <input checked="" type="checkbox"/> | 0 |
| Group | Vocational (VOC) | Salary | <input checked="" type="checkbox"/> | |
| Shift | First Shift (FIRST) | Highly Compensated | <input type="checkbox"/> | |
| Overtime Type | Regular Over 40/Week (REGOVER40) | Do Not Enter Begin/End Times | <input type="checkbox"/> | |
| Holiday Non-Worked Type | Regular | | | |

All Directors Group

- ▶ Sends a message or an alert to anyone in a Position that has the Director check box selected.

[Employee Care](#) | [Positions](#) | Director Residential Services ▾

Reports Delete Add Copy ☰

Basic Information Edit

Description: Director Residential Services

Active:

Position Type: Director 📄

Filled By: Fuller, Isaac (000219) 📄

Employment Information Edit

If Employment Tracking is enabled and Sync Primary Position Information to Employee is enabled in Positions and Placement Option, the information below will sync to the filled by employee's record if it is their primary position/managed position.

| | | | |
|-------------------------|------------------------------------|--|-------------------------|
| Work Status | Full-Time | Director <input checked="" type="checkbox"/> | <u>Position Counts</u> |
| FTE | 1.00 | Manager <input checked="" type="checkbox"/> | Direct Subordinates: 10 |
| Cost Center | Family Care Home (2000) 📄 | Exempt <input checked="" type="checkbox"/> | |
| Group | Directors (DIRECTORS) 📄 | Salary <input checked="" type="checkbox"/> | |
| Shift | First Shift (FIRST) 📄 | Highly Compensated <input type="checkbox"/> | |
| Overtime Type | Regular Over 40/Week (REGOVER40) 📄 | Do Not Enter Begin/End Times <input checked="" type="checkbox"/> | |
| Holiday Non-Worked Type | Regular 📄 | | |

Dynamic Group Access

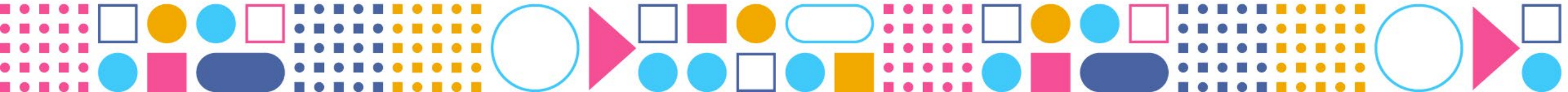
- ▶ Must be a Message Administrator to give users access to use dynamic groups

The screenshot illustrates the 'Manage Dynamic Group Access' process in three stages:

- Messages Menu:** A dropdown menu is open, with a blue arrow pointing to 'Manage Dynamic Group Access'.
- Group Selection:** The 'Manage Dynamic Group Access' screen shows a search bar and a list of groups. A blue arrow points to 'All Directors'.
- User Management:** The 'All Directors' group is expanded, showing a list of users with toggle switches. A blue arrow points to the toggle switch for 'Ava Fischer', which is currently turned on.

Callout: A pink starburst contains the text: "Contact support if groups are missing in your list".

Staff Scheduling: Request Substitute



Staff Request Substitute

Staff can request a substitute to fill their scheduled shift slot:

- Post the Shift First
- Send Request to Specific Staff
 - Appears as Pending on Requestee's Schedule
 - Requestee receives a Message in Message Center
 - Requestee can Accept or Reject Request
- If Requestee Accepts, the Manager still must Approve Swap (if required)
- If Requestee Rejects, remains on Swap board, Requester can send another Request

Sep 7, 2024 7:00 AM

Saturday, September 7, 2024
7:00 AM - 7:00 PM

Description Days
Location Adams St. FCH
Staff Alice Smith, Open
Service Type Wake
Clients Bill Delaney, Bradley D

Call Off Post Shift Find Substitute

Messages

Conversations

Time/Schedule Actions

New Sub Request
Solano System
Alice Smith has invited you to take

9/6/24, 11:21 AM

Alice Smith has invited you to take their shift at Adams St. FCH from 9/7/2024 7:00 AM to 9/7/2024 7:00 PM.
<https://dataplus.rdu-east-1.sandata.com/v2/a/s/my-schedule?start=2024-09-07&end=2024-09-07>

Sep 7, 2024 7:00 AM

Alice Smith has requested that you take this shift, press below to accept or reject this swap.
Saturday, September 7, 2024
7:00 AM - 7:00 PM

Description Days
Location Adams St. FCH
Staff Alice Smith, Open
Service Type Wake
Clients Bill Delaney, Bradley Demir, Brendan Dove

Accept Sub Request Reject Sub Request

Find Substitute

Saturday, September 7, 2024 7:00 AM - 7:00 PM
Wake | Adams St. FCH

Barbara Adlamson
4391 333-5280
Barbara.Adlamson@kangaserve.com

Deborah Crewe
4391 333-5280
Deborah.Crewe@kangaserve.com

Emily Darr
4391 333-5280
Emily.Darr@kangaserve.com

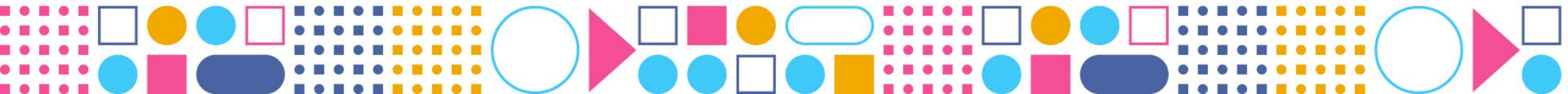
Erin Gramm
4391 333-5280
Erin.Gramm@kangaserve.com

Evan Rodgers
4391 333-5280
Evan.Rodgers@kangaserve.com

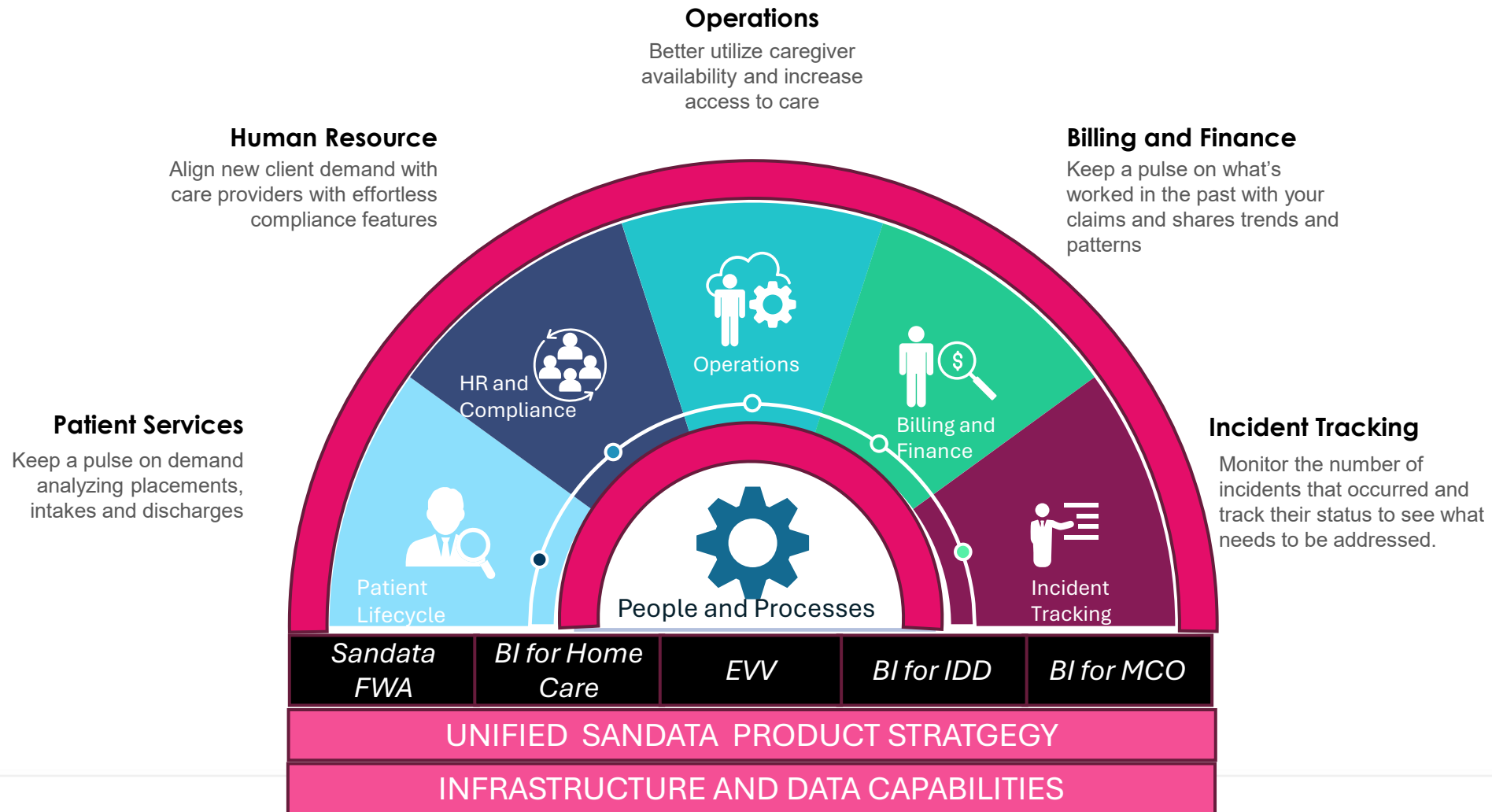
Fred Richard
4391 333-5280
Fred@kangaserve.com

Send Substitute Request

Business Intelligence and Analytics for I/DD



Sandata Analytics Strategy : Unlocking insights with data and technology



Sandata BI Dashboard - IDD

- ▶ New—Sandata BI has created a new tool that will allow agencies to make better business decisions and improve their performance by having key metrics in a dashboard.
- ▶ Dashboard—Sandata BI has incorporated data and has developed cards in a dashboard that provide key metrics to monitor agency performance in multiple areas.
- ▶ Visualizations—Dashboard contains cards that track and trend agency performance over time allowing agencies to drill down to see certain data to improve profitability.



Maximizing Value: Unleashing Insights Through Data Analytics with BI

| Category | Dashboards | Value Props |
|-----------------------|---|--|
| Individual Life Cycle | <ul style="list-style-type: none"> -Intakes -Discharges -Active Placements -Placement Begin Dates -Placement End Dates | Keep a pulse on any new intakes or discharges as well as the number of active placements. Additionally, track the movement of individuals from one placement to another within your agency |
| Employee Management | <ul style="list-style-type: none"> -Staffing Analysis -Compliance Requirements | Track the number of employees at each placement as well as easily monitor their compliance renewals and any upcoming requirements to complete. |
| Contracts | <ul style="list-style-type: none"> -Trended Service Contracts & Clients -Renewals | View trended number of service contracts and plan for upcoming contract renewals so you do not run into any renewal issues. |
| Billing and Finance | <ul style="list-style-type: none"> -Aging -Billing | Enhance financial health, streamline billing processes for fiscal management. |
| Operations | <ul style="list-style-type: none"> -Incident Tracking -Incident Status | Track and monitor any incidents that occur at your agency allowing you to see what has been evaluated and what still needs to be addressed. |

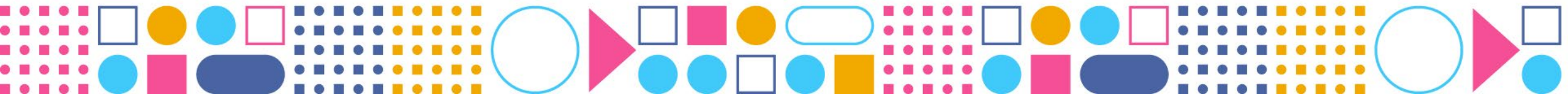


IDD Dashboard Reporting Structure

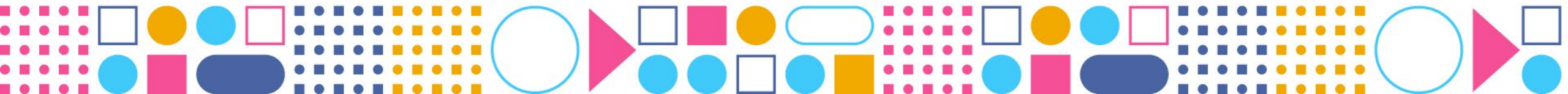
- **Organization**—Overall view as we want to give a summary of the performance of the Organization as a whole.
- **Department**—For the Different Lines of Business, we want to try and give visibility to your Departments, primarily Residential and Community Services.
- **Programs**—Within the Departments, we want to try and give a view of the Programs that are setup in IDD.
- **Placements**—Within the Programs, the lowest breakdown we want to try and analyze would be the Individual Placement.



Live Demo



Q&A



Thank You

