



Reports Definitions

Reference Guide

Contents

Reports Definitions	1
Overview	1
HHAX System Key Terms and Definitions	1
Visit Reports Definitions	2
Time and Attendance Reports Definitions	5
Exception Reports Definitions	6
Events Reports Definitions	8
Billing Reports Definitions	9
AR Reports Definitions	13
Payroll Reports Definitions	15
Caregiver Reports Definitions	18
Patient Reports Definitions	22
Compliance Reports Definitions	26
DOH Reports Definitions	28
Sales Reports Definitions	29
Vendor Management Reports Definitions	30
Miscellaneous Reports Definitions	31
Clinical Reports Definitions	32

Reports Definitions

Overview

The **Report Definitions** reference guide provides a list of HHAExchange (HHAX) standard reports in their respective categories available to Providers. Each listed item contains the report title, the path to locate the report, and a high-level definition describing what the report entails.

Please direct any questions, thoughts, or concerns regarding the content herein to [HHAExchange Client Support](#).

HHAX System Key Terms and Definitions

The following provides basic definition of HHAX System key terms applicable throughout the document.

Term	Definition
Patient	Refers to the Member, Consumer, or Recipient. The Patient is the person receiving services.
Caregiver	Refers to the Aide, Homecare Aide, Homecare Worker, or Worker. The Caregiver is the person providing services.
Provider	Refers to the Agency or organization coordinating services.
Payer	Refers to the Managed Care Organization (MCO), Contract, or HHS. The Payer is the organization placing Patients with Providers.
HHAX	Acronym for HHAExchange

Visit Reports Definitions

Visit Reports Definitions		
Report Name	Path	Definition
Visit Report	Report > Visits > Visit	Display the schedule, confirmation, and bill details for visits that fall within the specified visit or invoice date range. The available filter fields allow users to sort the search results based on Office, Contract, Discipline, and so on.
Duplicate Visit Report	Report > Patients > Duplicate Visit Report	Provides a list of Patients and visits that are already on the calendar.
Patient Signature Timesheet	Report > Visits > Visit > Patient Signature Timesheet	This report is a duty sheet providing the Caregiver and Patient signatures from the Mobile App. Report also provides the Mobile App Notes for the visit.
Scheduled Vs Actual Hours by Caregiver	Report > Visits > Visit	Use this report to compare scheduled visit hours with actual confirmation times within a specified timeframe; allows Agencies to identify discrepancies. Use the available filter fields to sort the search results based on Office, Contract, Discipline, and so on. Additionally, users may choose to group the results by Caregiver and include unconfirmed/missed visits.
Patients Live-In Report	Report > Visits > Visit	Displays a snapshot of all active Live-In Patients with visits within the specified timeframe. Results can be grouped by Patient Team.
Visits by Contract	Report > Visits > Visit	Provides a summary of visits scheduled and billed for each contract within the specified time frame, with totals displayed for all contracts. This report can be run for a single contract.
Schedule vs Actual Hours Mismatch	Report > Visits > Visit	Report shows the details for visits within the specified time frame for which there is a discrepancy between scheduled versus actual hours worked. This report can also be run for a specific contract, Caregiver, Patient, and/or Coordinator.
Visit Log	Report > Visits > Visit	Lists basic schedule/visit information for Patients with visits scheduled during the time frame selected.
Authorizations Due By Date	Report > Visits > Scheduling	A forecasting report that shows all expiring authorizations within a specified timeframe. This report can be run with several filters and formatting options. Some filter options limit the results to a single contract, Coordinator, Discipline, Patient status, and/or Visit Type. Formatting options include grouping by contract or due date.
Schedule by Patient (Summary)	Report > Visits > Scheduling	Lists the weekly schedule for each Patient meeting the selected criteria.
Schedule by Patient (Detail)	Report > Visits > Scheduling	Displays a list of weekly Patient schedules from the specified date. This report can be run for a single Contact, Caregiver, Coordinator and Discipline. The results can also be grouped

Visit Reports Definitions		
		by Coordinator or Nurse, if desired.
Schedule by Caregiver (Summary)	Report > Visits > Scheduling	Lists Caregiver schedules for one or two weeks, including scheduled overtime hours. This report can be run for a single Caregiver or Patient Team, Location or Branch, as well as for a single Contract or Coordinator.
Schedule By Caregiver (Detail)	Report > Visits > Scheduling	Lists Caregiver schedules for one week, broken down by Patient. This report can be run for a single Caregiver or Patient Team, Location or Branch, as well as for a single contract or Coordinator.
Schedule by Coordinator	Report > Visits > Scheduling	Displays all Patients' weekly schedules from the selected date, grouped by Coordinator. This report can also be run to show schedules for Patients with a specific visit type.
Authorizations Under Utilized	Report > Visits > Scheduling	This report may be run to determine whether Patient schedules for a specific contract, Coordinator, Visit Type, and/or Discipline are using all the hours or units allotted by the associated Authorizations.
Authorizations Over Utilized	Report > Visits > Scheduling	This report may be run to determine whether Patient schedules for a specific contract, Coordinator, Visit Type, and/or Discipline are exceeding the hours or units allotted by the associated Authorizations.
Temporary Schedules Report	Report > Visits > Scheduling	Lists Patients with visits in which either the scheduled time or Caregiver (or both) was changed from the permanent schedule.
Schedule by Contract Summary	Report > Visits > Scheduling	Lists the total scheduled hours, days, and number of visits within the selected time frame for each contract.
Manual Verified Visits	Report > Visits > Audit	Comprehensive list of all visits that were confirmed manually within the specified time frame. This report can also be run for a specific Patient and/or Caregiver.
List of Deleted Visits	Report > Other Reports	Lists visits deleted in the time frame specified. Data is based on deleted visits processed each night. The Coordinator name displayed reflects the Coordinator assigned to the Patient at the time the process is run.
Scheduled Split Shifts	Report > Other Reports	Provides Today's and all future Scheduled Split Shift. Report Provides Patient Information, Patient Schedule, and Caregiver Information.
Schedule vs Visit Start Time Report	Report > Visits > Visit	This report displays all confirmed visit details, for visits where the visit start time and scheduled start time differ (positive or negative) less than the value provided in the "Less than Hours" filter. Missed visits are excluded. An IVR/non-IVR indicator is included for each visit.
Visit Times and Notes	Report > Visits > Visit	This report displays the Reasons and Notes, if applicable, for visits within the timeframe selected that had the call in and/or out manually entered.

Visit Reports Definitions		
CDPAP Reimbursement	Report > Visits > Visit > CDPAP Reimbursement	This report places a Y for each Patient and where the number of hours fall. The report also indicates if the Patient has received at least one hour of service.
Duty Minutes Exceptions Report	Report > Visits > Visit > Duty Minutes Exceptions Report	Displays visits where duties entered have an additional value. Additional values are displayed in decimal format.

Time and Attendance Reports Definitions

Time and Attendance Reports Definitions		
Report Name	Path	Definition
IVR Caregiver Compliance	Report > Time and Attendance > Time and Attendance	Statistical report showing the call in/out trend for each Caregiver.
Time and Attendance Report (New)	Report > Other Reports	Displays the call in/out history by Patient for a specified time-frame (up to 14 days), including visit details.
Visits by Coordinator	Report > Time and Attendance -> Time and Attendance	Lists all visits scheduled by a Coordinator within the selected time frame, displaying both schedule and visit information.
Employee Working Hours	Report > Other Reports > Schedule	Lists employees that worked during the time frame selected, including the period of time worked, and total hours and days worked.
Split Visits Report	Report > Other Reports	Lists all split visit information within the time frame specified, including the Caregivers assigned to both the pre- and post-shifts.
Print Required Timesheets	Reports > Other Reports	Prints time sheets for the specified week. The output can be restricted to time sheets if required on the Patient, Visit or by the Contract.
Split Shift Report	Report > Other Reports	Lists each set of visits comprising a split shift, and includes scheduled and visit times, and Caregivers assigned to each shift.
AT&L Report	Report > Other Reports	Lists all visits that are at least partially manually confirmed. An option is given to display all visits, both confirmed and unconfirmed, and regardless of method of confirmation. This report is grouped by Contract and by Patient.
Home Attendant Time Sheet	Report > Other Reports	Creates a time sheet for all Caregivers with payroll in the payroll week selected.
IVR In/Out with Timesheet Required	Reports > Other Reports	Displays visits between the selected dates that are marked "Timesheet Required" but are not marked as "Timesheet Approved". Users have the option to exclude Contracts that require Timesheets from the report results.
IVR Log of Calls With Caller ID	Report > Other Reports	Displays the details for all IVR calls in the selected timeframe.
Split Shift With Daily Billing Rate	Report > Other Reports	This report displays the split shifts that have multiple shifts in a single day, with at least one shift with a Daily billing rate.

Exception Reports Definitions

Exception Reports Definitions		
Report Name	Path	Definition
Scheduled Visits with Temp or Inactive Caregiver	Reports > Exception Reports > Scheduled Visits with Temp or Inactive Caregiver	Provides a list of visits with unassigned or inactive Caregivers who fall within the specified time frame. Report may be run for a specific Contract, Coordinator and/or Patient.
Conflict Report	Report > Exception Reports	This report reviews billed visits based on Caregiver SSN across the entire HHAExchange system. If the system locates two or more overlapping billed visits with a single Caregiver SSN, then these visits are listed in the report results. This report can be run for specific Contracts, Caregivers, or for a specific time-frame.
Visits With Temp Caregiver	Report > Exception Reports	Identifies visits scheduled with a "TEMP" Caregiver in the specified time frame. This report may be run for specific Patients, Coordinators and/or Patient Status.
Conflict Report Based on Schedule	Report > Exception Reports	This report identifies potential conflicts in Caregiver schedules based on the entered visit date range. This report can be run for a single Contract and/or Caregiver.
Pre-Billing Exception Report	Report > Other Reports > Exception Reports	Identifies billing issues prior to the invoicing process. This report can be run for a specific contract.
Exception Detail Report	Report > Exception Reports	This report displays all call exceptions on visits that are either in the selected batch, within the specified visit date range, or within the selected invoice date range. The visit information is listed with the exception, reason and notes for each visit with a call exception. This report can be run for a single Contract, Caregiver, Patient, or Coordinator. In addition, the report can consider only visits when a timesheet is or is not required, a specific Service Type, Billing Status, and/or Type of Call Exception.
Master Week With Temp Caregiver	Report > Exception Reports	Lists Patients with master weeks with at least 1 shift assigned to a "TEMP" Caregiver.
Unbalanced Visits	Report > Exception Reports	Lists visits held in prebilling because the Time and Attendance call fell outside the tolerance window specified in the Agency Profile.
Patients With No Master Week	Report > Exception Reports	Provides a list of Patients that do not have a Master Week.
Exception by Reason	Report > Exception Reports	The total number of exception calls and percent of all exceptions within the specified visit date range is listed for each exception reason. The grand total number of exception calls and percent of exceptions relative to the number of shifts is also given.

Exception Reports Definitions		
Exception Statistics	Report > Exception Reports	This report lists statistical data on total call exception per day.
Exception by Caregiver	Report > Exception Reports	This report displays the number of call exceptions for Caregivers within the selected date range. Only exceptions for billed visit are shown. The number of billed visits, percentage of billed visits that involved call exceptions, and number of missed visits for that caregiver are also displayed.
Conflict Report	Report > Exception Reports	This report lists paid visit details for all the Caregivers in the selected payroll batch. The report includes totals per Caregiver, as well as the grand totals for the batch. The prior week payroll section is listed after each payroll week per Caregiver. This report may be run for a single Caregiver and further filtered by specified service date range.
Exception Summary by Vendor	Report > Exception Reports	This report is used to review the exception totals for the entire Agency. Results include the total number of exceptions and visits, as well as billed and missed visits.
Exception Report – Schedule GT16 Hours	Report > Exception Reports	This report searches for Caregivers that are scheduled for one or more shifts that total 16 or more hours.
Visits Missing Timesheet Required	Report > Exception Reports	This report displays all manually-updated visits with Timesheet Required at the visit level, with options to include linked Contract cases and/or billed visits.
VNS Exception Report	Report > Exception Reports	This report lists VNS visits in the selected time frame with exceptions. Exceptions are “Missing Absence code” or “Missing OT Code”.
Negative Check Exception Report	Report > Other Reports > Exception Reports	This report displays - by Caregiver, by payroll batch, visit payroll details for Caregivers with total negative pay amounts for prior weeks.
State Aggregation Report	Report > Exception Reports > State Aggregation Report	Provides state EVV aggregation data for MCOs and FFS contracts. Currently available for NY, PA, and DC markets.
Ohio EVV Exception Report	Report > Exception Reports > Ohio EVV Exception Report	Provides specific EVV data that is used in the Ohio Market. Report information is based on the New Verification Module
Vendor Response	Report > Exception Reports > Vendor Response	This report is for Providers using HHAX to bill with CareBridge or Tellus. Report provides the latest record status and errors to fix for billing.

Events Reports Definitions

Events Reports Definitions		
Report Name	Path	Definition
Missed Visit by Office	Report > Events	This report provides a list of missed visits scheduled within the selected dates. Allows management to monitor how many cancellations of services are taking place through a selected time-frame. This report may be run for a single Contract, Coordinator, or Patient.
Discharge Event Report	Report > Events	Displays the list of all Patients who were discharged within the specified time frame. This report can also be run for a single Contract and/or for a selected insurance.
Change in Service	Report > Events	Lists Patients with a change in service that occurred in the time frame specified.
Patient Activity Summary	Report > Events	Displays a complete list of visits, Contract information, Notes and Events for a single Patient.
TT-OT Report	Report > Events	Lists travel/overtime requests all visits on linked Contracts with Travel Time/Over Time requests within the specified time frame.
Patient Conversions (Summary)	Report > Other Reports	Displays the total number of Patients discharged from one Contract and assigned to another within a three-day period.
Patient Conversions (Detail)	Report > Other Reports	This report displays the same data shown in the Patient Conversions (Summary), but also displays the Admission ID, Patient Name, and Conversion Date for each Patient.
Patient by Discharge (Summary)	Report > Other Reports	This report displays the number of Patients discharged per contract within the selected timeframe, as well as hours lost, based on the master week. There is an option to group by Country or Location.

Billing Reports Definitions

Billing Reports Definitions		
Report Name	Path	Definition
Prebilling by Patient (Detail)	Report > Prebilling > Billing	A detailed view, grouped by Patient, of all billable visits prior to invoicing.
Prebilling by Patient (Summary)	Report > Billing > Pre-billing	A summary view, grouped by Patient, of all billable visits prior to invoicing.
Billed Not Exported Visits	Report > Billing > Medicaid	All invoices that have not been exported due to Billing Review Hold. Used to track billed visits that did not meet the e-billing requirements of the contracting vendor. This report may be filtered to display services within a visit date range or invoice date range, and/or visits within a single batch. Additionally, the results may be grouped by contract or run for a single Contract, Visit Status, "Reason Not Exported", and/or Coordinator.
Transaction Detail	Report > Billing > Medicaid	
Billing by Patient (Detail)	Report > Billing > Invoicing	Displays an alphabetical list of Patients that had billed visits for the week from the specified date, showing the visit details for each shift, including the number of hours billed per day.
Billing Report	Report > Billing > Invoicing	This report lists, by contract, billing/visit details for all visits billed within either the selected visit date and/or batch date ranges. Totals for each contract are shown. This report may be run for a single Contract, Caregiver, Patient, or billing batch. In addition, the report may be grouped and summarized by Team, Patient or Caregiver.
Open Invoice Summary	Report > Other Reports > Billing	Lists all open invoices within the specified time frame, grouped by contract. This report may be run based on visit or invoice dates and may be run for a single Contract or Patient.
Open Invoice Detail (New)	Report > Other Reports > Billing	This report lists, for a single contract, invoice information for all visits that have not been invoiced but not paid. The visits are grouped by Patient, with totals given for each Patient, and a grand total for each Contract. This report may be run for a single Patient or Invoice.
Rejected/Pended Invoices	Billing > Electronic Billing > E-Remittance Search > Search > Select Rejected Value	In the "Rejected" column of the Remittance Search page, users may click the rejected amount to generate a PDF that lists the visits associated with the claim that were rejected.
Deleted Invoice History	Report > Other Reports > Billing	Displays a detailed list of deleted invoices and their replacements, when applicable. This report can limit the display to deleted invoices within selected visit dates, visit deletion

Billing Reports Definitions		
		dates, new invoice dates, or old invoice dates. The option is also available to display invoices for a single Contract and/or Patient.
Batch Summary Report	Report > Billing > Invoicing	Displays the invoice summary and total invoices/billed dollars associated with a specific batch. Usually used as a cover sheet.
Batch Detail Report	Report > Billing > Invoicing	List of all invoices/visits generated for each batch within the specified time frame for the selected contract. This report can be run only for a specific payment status.
Unbilled Visits by Vendor	Report > Billing > Unbilled	Separate lists of unverified and verified visits within the specified date range that have not been billed. This report can be run for a single Patient and can exclude missed visits from the report.
Collection Report	Action > Collection > Summary View radio button > PRINT button	Displays records of interactions pertaining to visits in collection
Patient Financial Invoice	on Patient > Financial tab > Invoices tab > Print button	Detailed list of invoices for a Patient that were either generated within specified range, invoices for visits within specified range, or for invoices with notes that have follow-up dates within the specified range. This report may be run for a specific Contract and/or Invoice Status.
Statement Report	Report > Other Reports	This report generates statements for Patients with visits between the specified dates, or for all Patients with open transactions. This report may be run for a single Patient, all Patients, or Patients under a single contract.
Payment Detail List	Report > Other Reports > Billing	Lists the details of all payments entered within the check date range specified. This report may be run to include a range of check amounts and/or for a specific Contract, Check Number, Patient, or Payment Type.
Patient Surplus Report	Report > Billing	Generates a report that display all Patients with surplus and/or deductibles.
Compliant Visits Pending Invoice	Report > Billing > UnBilled	Detailed report listing all compliant visits within the specified time frame that have not been invoiced. This report may be run for a single Contract.
Unbilled Aging Summary	Report > Billing > UnBilled	Displays aging between visit date and current date of billable visits not yet invoiced.
Duty Sheet	Billing > Print Invoices > search/select invoices > PRINT DUTY SHEET button	Creates a PDF of the duty sheet(s), including invoiced hours, for the selected invoice(s).
Duty Sheet	Billing > Print Duty Sheets	This report displays all duty sheets for Patients under the selected contract and within the selected invoice, or service

Billing Reports Definitions		
		dates, or both. This report may be run for a specific batch number, Caregiver, or Patient. The report includes a header that contains basic Patient profile information.
Print V2	Billing > Invoice Search > By Batch > select Batch Number > PRINT V2 button	Allows printing of all invoices within a batch without the social security number column.
Un-Printed Invoice Report	Report > Billing	Report provides a list of invoices that have not been printed. The report also has an option to see printed invoices.
Billed Not Exported Visits	Report > Billing	Any visit that has been invoiced and billed but has no export date.
E-Billing Denial Report	Report > Billing	This Report shows a list a distinct list of denials per Patient and visit date. If visit was denied multiple times, the most recent denial is listed.
Electronic Remittance Preview Report	Report > Billing	Displays an explanation of charges that are paid, partially paid, adjusted, or denied by the insurance.
Timely Filing Report	Report > Billing	This report identifies visits that are within both a specified visit date range, and within a specified Timely Filing date range.
Billing by Caregiver (Detail)	Report > Billing > Invoicing	This report displays the billed hours per day for each Caregiver in the selected week.
List of Exported Billed Visits	Report > Billing	This report displays, by Patient, billed visits in the visit date range specified.
Cash to Bank Report	Report > Other Reports > Billing	This report lists all checks deposited/posted within the date ranges and for the contracts selected. A second view of the data is provided, grouping and sub-totaling the transactions by Contract, with a grand total displayed at the end of the report.
Invoice List Detail	Report > Other Reports > Billing	This report displays, for the contracts selected, invoice details for invoices created between the selected dates. The results are displayed as one page per batch, and grouped by Patient, showing subtotals per Patient and batch totals. Grand totals are displayed on the last page of the report.
Billing by Service Code	Report > Other Reports	This report displays, by Contract and Discipline within each Contract, the total Hours, Daily, and Visit counts billed for each Service Code during the selected timeframe.
Claim Submission Detail	Report > Billing	Displays, by contract type, each claim within either the invoice dates or visit date range selected. The contract, Patient name, billed amount and the billing method (exported, printed, or exported/printed).
Visit – Billed But Not Paid	Report > Other Reports	Displays, grouped by Caregiver, details on the visits for which there is an invoice, but are not yet paid. This report can be

Billing Reports Definitions		
		run based on invoice and visit dates.
Billing by Caregiver (Summary)	Report > Billing > Invoicing	This report displays the Caregiver who had billed hours for the week ending in the date selected, the billed hours per day of the week, total hours per Caregiver, and grand total hours.
Prebilling By Patient (Detail)	Report > Other Reports > Billing	This report displays billable visits detail by Patient from the time frame selected.
Unbilled Visits Without Authorization	Report > Other Reports	This report displays, by contract, visits not yet billed without authorizations. This report is NOT restricted to scheduled visits; confirmed visits without authorizations also display.
Prebilling by Aide (Detail)	Report > Billing > Pre-billing	This report displays the number of scheduled visit hours held in Prebilling based on the scheduled Caregiver for a 7-day period. It breaks down the held visit hours based by Patient. It also "totals" the number of scheduled visit hours held in Prebilling for that week by Caregiver.
Prebilling by Aide (Summary)	Report > Billing > Pre-billing	This report displays the number of scheduled visit hours held in Prebilling based on the scheduled Caregiver for a 7-day period. It also "totals" the number of scheduled visit hours held in Prebilling for that week by Caregiver.
Patient Statement Report	Report > Other Reports	This report displays detailed billing information for each Patient. The report sorts data based on invoice, providing the following information for each: Invoice Date, Visit Duration, Total Hours, Total Amount, Check Number, Payment Date, Paid Amount, Adjustments, Payment Status, Open Balance. It also totals these values for each Patient.
Patient Statement Report	Report > Other Reports > Patients	This report displays detailed billing information for each Patient, including the Service Code used in the visit, and provides a more summarized format of the bill.
Patient Statement Report	Report > Other Reports > Patients	This report displays a list of claims by visits with different status by Provider. This report can also be run by a single Patient, invoice number.

AR Reports Definitions

AR Reports Definitions		
Report Name	Path	Definition
AR Detail Report V2	Report > AR	AR by invoice per contract as of the specified check, transaction, or deposit date and includes overpayments. Within each contract listing, this report can be grouped by Patient Team, Due Date or Patient Name, and can be run for a specific Caregiver Discipline.
AR Detail Per Visit	Report > AR	This report displays, by contract, the AR detail by visit for each invoice within the selected invoice date range. The results may be further filtered to show only posted payment, and/or visits within a specified date range. This report may be run for a single contract, Patient, invoice, and/or Caregiver Discipline and Service Code. The report includes overpayments by default.
Cash Receipt Journal	Report > AR > Cash Posting	List of visits and their respective payment/denial entries based on check, deposit, and/or posted date. This report distinguishes between General and Patient-Specific Credit.
AR Summary Report	Report > AR	AR by contract as of the specified check date. This report can be run for a specific Contract, Caregiver Discipline and Service Code, with options to include unapplied cash, unapplied credit and overpayment in the report. To reconcile against the AR Detail Report and AR Detail Per Visit, the Include Overpayments must be selected. Results can be grouped by Team within a Contract.
Open Balance Report	Report > AR	Lists pertinent AR information for visits with open balances between the specified visit or invoice dates. This report may be run for a single contract or Patient by Admission ID.
Cash Posting Detail by Check	Reports > AR > Cash Posting	This report displays a detailed list of payments applied to visits. The payments can be grouped by check or by Patient. In addition, the report can be run for a specific Contract, Caregiver Discipline, Patient, Payment Status, or check. Results can also be limited based on a range of check, posting, visit, or deposit dates.
Payment Adjustment	Report > AR > Cash Posting	Displays adjustments and adjustment reasons to visits payments.
Credit Report	Report > AR > Cash Posting	Displays where credits were placed on and/ or applied from by check
Applied Credit Transactions Report	Report > AR > Cash Posting	Provides all checks with credit applied to them. Report lists all unapplied credit left on the ticket as well as the amount of Credit used during the From and To Date filters.
AR Summary by Trans-	Report > AR	Displays AR summary by contract with the option to show

AR Reports Definitions		
actions		group the contract summary by Team based on a Sales As of Date. This report may be run for a single Contract, Team, Location or Discipline. Aging categories may be modified.
AR Detail by Transactions	Report > AR	Displays AR details by contract, by visit, with the option to show group the contract summary by Team based on a Sales As of Date. This report may be run for a single Contract, Team, Location or Discipline.
AR Detail Report	Report > Month End Reports (V4) > AR Detail Report	Provides AR details per Patient per invoice. Report provides Invoice Number, Invoice Date, Aging, Billed Amount and Paid Amount.
Cash Posting Report	Report > Month End Reports (V4) > Cash Posting Report	Provides both a detail and summary view of Cash Posting payments and refunds. Report is broken up into Prior and Current weeks.
Adjustment Summary Report	Report > Month End Reports (V4) > Adjustment Summary Report	Provides both a <i>Detail</i> and <i>Summary</i> view of any Adjustment. Report is broken up into Prior and Current weeks.

Payroll Reports Definitions

Payroll Reports Definitions		
Report Name	Path	Definition
Pre-Process Payroll (Summary)	Report > Payroll	Summarizes a Caregiver's pay hours and amount for a specific pay period. Report can be generated once the hours have been billed, and before payroll has been processed. This report displays both current and prior weeks' information.
Pre-Process Payroll Detail	Report > Payroll	Details Patient and visit information with service codes and pay amount for each Caregiver. Report can be generated once the hours have been billed and before payroll has been processed. This report displays both current and prior weeks' information
Payroll Hours by Caregiver Summary With New Payroll	Report > Payroll	Summarizes each Caregiver's payroll information (paid visits, travel time, and expenses) within a selected payroll batch. Report provides filters such as, Caregiver's or Patient's Location, Branch, or Team. Selected filters can be added to modify report columns.
Payroll Hours by Caregiver Detail With New Payroll	Report > Payroll	This report lists payroll information (paid visits, travel time, and expenses) for all the Caregivers in the selected payroll batch. The report includes totals per Caregiver, as well as the grand totals for the batch. Prior week payroll per Caregiver is listed separately, at the end of the report. This report may be run for a single Caregiver, and/or Coordinator. This report may be grouped by Caregiver, combining current and prior week.
Billing Vs Payroll	Report > Payroll	Details billing and payroll information based on visit dates, invoice dates, by a specific contract and/or Caregiver.
Caregiver Rates	Report > Other Reports	Basic report that shows all of payroll the Discipline rates that are setup in the system
Overtime Payroll Report	Report > Other Reports	Lists hours worked per calendar visit for Caregivers with overtime hours during the selected payroll week. This report may be run for a single Coordinator.
Confirmed Visit Report	Report > Payroll	List the details of the confirmed visits for each Caregiver that occurred within the specified time frame, including totals for each Caregiver.
Interrupted Work Report	Report > Payroll	This report displays the total interrupted minutes during break time (meal or sleep time) during which the Caregiver performed Patient care. Interrupted minutes are those reported by the Caregiver during the EVV clock-out process based on the set up on the Agency Profile/Payroll Section.
Weekly Average Payroll	Report > Caregiver	This report displays the weekly average payroll and average number of daily cases for Caregivers with payroll within the specified dates.
Caregiver Total Paid Hours	Report > Other Reports > Caregiver	This report displays Caregivers with payroll hours during the time-frame specified. The report can be run by a visit date range, payroll

Payroll Reports Definitions		
		date range, or both. Hours are broken down into Hourly, Daily and Visit categories, and there is an option to display social security number and/or exclude in service hours.
Wage Parity Hours	Report > Payroll	Displays hours worked for the time period selected, either by visit or invoice date range, for cases designated as Wage Parity based on the contract setting, or if the Patient is designated as wage parity. The report returns confirmed hours, unless the Display Only Paid Hours box is selected. Only half the hours for mutual Patients are considered. This report can be filtered and/or grouped by Contract Type and Contract.
Inter-Shift Time Report	Report > Payroll	Displays Caregivers with multiple shifts in one day and the time between shifts meets the minimum and threshold requirements specified. Based on the hourly rate specified, the report also calculates the fee for either the time between shifts (shifts differential), travel time, or driving time. The report ignores shifts that are designated as non-payable.
Payroll Hours by Caregiver Summary	Report > Caregiver	Displays summary payroll data for each Caregiver who serviced Patients during the visit date range selected. This report can be based on all visits, only billed visits, or only visits that have not been billed.
Travel Time by Caregiver Summary	Report > Payroll	<p>This report may be run in either a <i>Summary</i> or <i>Detail</i> View.</p> <ul style="list-style-type: none"> <i>Summary</i>: Total travel time is provided for every applicable Caregiver within the specified timeframe. <i>Detail</i>: Provides all travel time records within the specified timeframe and sorts them by Caregiver. <p>The available filters allow users to sort results by only paid, or unpaid, trips.</p>
Deleted Travel Time Records	Report > Payroll	This report retrieves deleted travel time records within the specified date frame, detailing the user who deleted the record and the date it was removed.
Spread of Hours Report	Report > Payroll	This report displays confirmed visits (or multiple visits on a given day) which exceeded 10 hours and have been processed through payroll. This calculation is based on the confirmation times associated with the visit(s).
Overtime by Caregiver Report	Report > Payroll	This report may be used to review Caregiver overtime hours. The report displays total scheduled hours for the Caregiver, the number of hours paid, and overtime. The report also tells users what percent of the Caregivers hours within the specified timeframe are overtime with respect to be scheduled and paid time. This report only considers visits with hourly rates.

Payroll Reports Definitions		
Payroll Hours by SVC Code	Report > Payroll	This report breakdowns payroll first by Contract, and then by Service Codes associated with those Contracts. It considers all visit types (Hourly, Visit, and Daily) as well as In Service.
Pay Stub	Report > Other Reports	Displays detailed pay information by batch/Caregiver batch within the selected payroll weeks. An option is given to exclude prior week data contained in those batches.
Payroll Hours by Pay Code	Report > Payroll	This report displays payroll details - by service code - for the payroll week-end date selected, including for Hourly, Daily, Visit and In Service. Each of these are further broken down by Regular, Overtime and Holiday Hours.
Overtime Summary Report	Report > Payroll	This report displays weekly overtime summary statistics for hourly visits, including both OT based on schedule and OT based on paid. The report provides 12 weeks of data from the Payroll Week End data provided, and includes graph at the bottom.
Overtime Trend by Contract	Report > Payroll	This report displays total weekly overtime hours per contract. Six weeks up to and including the week selected are displayed. This report considers only hourly visits.
Overtime by Primary Coordinator	Report > Payroll	This report displays overtime statistics, both based on paid and based on schedule, per primary Coordinator for the payroll week selected.
Overtime Trend by Caregiver	Report > Payroll	This report displays total weekly overtime hours per Caregiver. Six weeks up to and including the week selected are returned by the report. This report only considers <i>Hourly</i> visit types.
Pending Adjustments	Report > Payroll	This report is used to identify Caregivers that owe hours/money to the agency, based on prior adjustments. It is used before payroll to ensure that the agency is not sending out paychecks with \$0 or negative dollar amounts.
Pre-Payroll ADP Exception	Report > Other Reports > Exception Reports	This report is used to see which employees have an issue on ADP payroll extract. It shows issues such as "Invalid Phone Number" or "Caregiver should be active" exceptions.

Caregiver Reports Definitions

Caregiver Reports Definitions		
Report Name	Path	Definition
In Service Attendance Sheet (Ent)	Report > Caregiver > Compliance (Ent)	Provides a list of the Caregivers scheduled for an in-service. Used for the Caregivers to sign in/sign out of a class.
In-Service Certificate	Report > Caregiver > Compliance (Ent)	Selecting this report provides the ability to search for and select an In-Service, as well as print out completion certificates for Caregivers which have attended the selected in-service.
Caregiver Medical Due (New)	Report > Caregiver > Compliance (Ent)	List of Caregiver compliance medicals that are missing, expired, or due within the specified time frame. The option is available to limit the results to a specific Medical Status, Caregiver Type, Status and Team, as well as list specific Medicals and/or Caregiver Disciplines.
Caregiver General Compliance V2	Report > Caregiver > Compliance (Ent)	This report shows the current compliance status of all Caregivers. If the Caregiver is out of compliance, then the non-compliant item(s) are displayed. This report can be run for a single Contract, Caregiver Type, and/or Caregiver Status.
In Service Due	Report > Caregiver > Compliance	Displays Caregivers that have not met the specified In-service hour quota for the specified period. This report can be run for a single Caregiver type, status and/or Discipline.
I-9 Expiry Report	Report > Caregiver > Caregiver Compliance (Ent)	Used to forecast all employees having an expiring I-9 document within the selected time frame. Refer to Admin->I-9 Compliance for required documents that the report considers. This report can be run for a specific Caregiver Type and/or Status. In addition, the user can select the Discipline(s) for which to run the report and select if the report should include Caregivers for which the I-9 is missing.
In Services by Caregiver (Ent)	Report > Caregiver > Caregiver Compliance (Ent) > In Services by Caregiver (Ent) search > View Report button	Displays all In Services for a single Caregiver with the specified time frame.
Print Caregiver Compliance	from Caregiver > Compliance tab > Print Compliance link	List of Caregivers and their compliance status, which considers all Agencies compliance criteria such as I-9, evaluations and medical.
Criminal Background Check	Report > Caregiver > Caregiver Compliance (Ent)	This report can be used to search the criminal background status of Caregivers. Used mainly to find temporary Caregivers.
Missing Medicals/Other Compliance Items	Report > Caregiver > Compliance	This report can be run to determine if any Medicals/Other Compliance items for the selected Office(s) are missing from the Caregiver Compliance page.

Caregiver Reports Definitions		
In Service by Quarter	Report > Caregiver > Compliance (Ent)	Designed for agencies tracking the in-services by quarter, this report displays the number of hours completed by each Caregiver for the specified 1-year period. Report can be run for all Caregivers, or just employees or applicants. In addition, this report can be run for a specific employee or applicant status.
List of Evaluations (Legacy)	Report > Caregiver > Compliance (Ent)	Legacy Compliance Report. Lists all Evaluations for a Caregiver and expiration dates.
Caregiver Compliance Compliant (Legacy)	Report > Caregiver > Compliance (Ent)	Legacy Compliance Report. Lists of all Caregivers who are Compliant at the moment.
HHA/PCA State Registry	Report > Caregiver > Compliance (Ent)	Lists Caregivers with missing state registry number but confirmed on at least one visit within the selected time frame.
Medical List	Report > Caregiver > Compliance (Ent)	List of medicals for each Caregiver within the specified time frame. This report may be run for a single Caregiver and/or for specific medicals.
Skilled Compliance Report	Report > Caregiver > Compliance (Ent)	Lists all Caregiver Compliance subject that expire during the selected time frame. If a subject has no expiration date for a Caregiver, then it displays as missing for that subject. Note: If the "No Car" option is checked for a Caregiver, the subject Automobile insurance expiration date does not show up in the report.
Temporary Caregivers > 30 Days	Report > Caregiver > Compliance (Ent)	Lists the Caregivers for which their criminal background check was submitted over 30 days from their hire date.
Temporary Caregivers	Report > Caregiver > Compliance (Ent)	Lists all Caregivers with an Active Status, but whose criminal background Status is either Submitted, Resubmitted, or not set. Note: This report includes only Caregivers with hire dates after 01/04/2005 OR without a hire date.
List of Caregivers (Ent)	Report > Caregiver	This report displays a list of Caregivers with the option to select from many Caregiver attributes for display and other sorting options.
List of Applicants/Caregivers	Report > Caregiver	List of Caregiver applicants or employees that have the selected status within the selected time frame. This report can be run for a single Discipline.
Caregiver by Contract	Report > Caregiver	Designed to show all Caregivers that are working for each contract within the specified timeframe. This report may be run for a single contract.
Caregiver Status Change History	Report > Caregiver	List of Caregivers that had a change in status during the specified date range. This report can be run for a specific old and/or new status, and/or status change reason. The report can also be run for only scheduled or completed changes, or both. The results of this report can be grouped by month or status change reason, if desired.

Caregiver Reports Definitions		
Pay Stub	Caregiver > Pay Check page > PRINT button	This report displays a Caregiver's pay stub for a selected payroll batch, or paycheck register based on a selected visit date range.
Pay Check Register	Caregiver > Pay Check page > Register View radio button > PRINT button	Create a printable version of the Caregiver's paycheck information for the visit date range specified in the register view search.
Caregiver Profile	Caregiver > Profile > PRINT PROFILE button	This report displays detailed profile information, including the information contained in the Caregiver's demographics, employment, address, emergency, and notification preferences pages.
Caregiver Profile	Report > Caregiver > Caregiver Profile > select caregiver(s) and View Report	This report displays basic profile information for selected Caregiver(s) from a Caregiver search. The most recent medicals and evaluations are included, as well as all in-services for the last 12 months. If the user has access to the Caregiver's social security number, the report can be customized to show either the complete number or last four digits.
Caregiver Calendar	Caregiver > Calendar > PRINT button	This feature provides a PDF of the Caregiver's calendar for the current month, with a header containing basic profile information.
Caregiver Masterweek	Caregiver > Calendar page > Caregiver Masterweek link	Shows the weekly schedule for the Caregiver based on Patients' schedules with the Caregiver in their master week.
Caregiver Notes	Report > Other Report > Caregiver	Lists the details for all Caregiver notes entered during the specified time frame.
List of Caregivers Hired	Report > Other Reports > Old DOH	List of Caregivers hired during the time frame specified. Includes basic demographic and profile information.
Caregiver Availability Report	Action > Availability > VIEW REPORT button	Lists Caregivers who meet the criteria specified and are available to work during the specified week, including demographic and schedule information.
Caregiver With No Schedule	Report > Caregiver	This report provides a list of Caregivers that have schedule opening within the specified dates. This report may be run for a single Caregiver Discipline.
Absences	Report > Caregiver	Lists Caregivers absent during the time frame specified, including absence type, pay rate and whether the absence was coded as benefit time.
Caregiver Mailing List Labels	Report > Other Reports > Caregiver	Creates mailing labels for selected Caregivers.
Languages Spoken by Caregiver	Report > Caregiver	Displays Caregivers who speak the specified language.
Rate Expiry Report	Report > Caregiver	List all pay rates that are expiring during a selected time period. Service codes are displayed by Discipline and by

Caregiver Reports Definitions		
		Caregiver.
Missing Medicals	Report > Caregiver > Caregiver Compliance (Ent)	This report displays missing medicals, based on the date entered. User can select the medicals to be checked.
Caregiver and In Service Letter	Report > Other Reports	This report searches for in-services between the dates provided, and a list of in-services is displayed. From the search results, the user can select an in-service; a standard Notice of In-service Training letter is printed for each Caregiver scheduled to attend the In-service selected.
Caregivers Working More Than 16hrs Per Day	Report > Other Reports	This report displays scheduled visits with a Caregiver (on an hourly rate) that are greater than 16 hours, based on scheduled start and end times. There is an option to include/exclude billed visits.

Patient Reports Definitions

Patient Reports Definitions		
Report Name	Path	Definition
Census by Coordinator	Report > Patients	Displays the census, including Coordinator. This report may be run for a specific Coordinator, Contract and/or Patient status.
Census History Summary	Report > Patients	Displays a snapshot of Patient census by contract based on the selected date. If a date is not selected, values for hours, daily, and visits are from date 01/30/2012. If Group by Discipline is selected, then the census is shown by contract within Discipline.
Census by Service Code	Report > Patients	Displays the number of hours per contract grouped by the billing Service Code.
Census by Primary Contract	Report > Patients > Census By Primary Contract	This report displays a list of Patients under their primary contract, for each contract. This report can be run for a single Contract and can be grouped by Patient Team within Contract.
Patients with week-end hours	Report > Patients	Displays all Patients scheduled with the selected upcoming weekend hours. This report can also be run for a single contract or Coordinator.
Medication Profile	Report > Patients	Comprehensive list of medication by Patient. This report can also be run for only active Patients, all Patients under a single contract, or for a single Patient.
List of Patients (Ent)	Report > Patients	This report displays a list of Patients, with the option to select many Patient attributes for display, as well as a number of sorting options.
Patient Status Change	Report > Patients	List of Patients whose statuses changed within the specified time frame, based on either entry date or event date. The results from this report can be limited to display Patients under a specific Contract, Coordinator.
Patient Activity Report	Report > Patients	Management report which tracks all Patient activity for each contract (Admissions, Discharges etc.) within the specified time frame. This report can be run by either event or Patient Start Date and can be limited to Patients within a specific Contract, Coordinator, or Patient activity.
Discharge Event Report (Ent)	Report > Patients	Displays Patients with Contract Discharge Date is approaching based on the specified date range. This report can be run for a specific primary contract and/or Coordinator.
Admission/Discharges Based on PatientID	Report > Other Reports	This report lists the admission or discharges that occurred within the specified time frame. This report can also be run based for a specific Coordinator, Service Type and/or Patient.

Patient Reports Definitions		
Patient Roster	Report > Patients	List of Patients with scheduled visits for the specified week, including comprehensive schedule information. Report may be run for all Patients, or Patients with selected statuses and/or under a selected contract.
Mutual/Linked/Cluster Visits Report	Report > Patients	Displays a list of all visits for mutual, linked, or cluster cases within the specified time period, by Contract.
Patient Profile Payer	from linked contract > Patient > Profile > Print Profile link	Profile report, including demographics, address, and emergency contact information, for a linked Contract Patient.
Patient General Notes (New)	Report > Other Reports	Displays all notes entered for the Patient record, including General Notes, Calendar Notes, Visit Caregiver Comments, and Missed Visit notes, within the specified time frame. This report may be run for a single Contract, Coordinator, or for Notes tagged with a specific reason.
Patient Note	Patient General tab > Note section > PRINT button	Creates a PDF version of the content of a Patient note.
Patient Calendar	Patient > Patient Calendar > PRINT button	Creates a PDF of a Patient's calendar for the current month, including basic Patient demographics and the last three authorizations for the Patient.
Patient Calendar	linked Patient > PRINT button	Prints the calendar for a linked Patient.
Patient Profile	Patient > Profile > PRINT PROFILE link	This report contains all information from the Patient's profile page. Date of birth and social security number prints only if the user has permissions to view this information.
Active Master Week Hours	Report > Patients	Displays the schedule details of Patients with an active master week for all or a single contract.
Patient Profile	linked contract Patient > Profile > PRINT PROFILE link	This report prints the profile specifically for a linked contract Patient. The report includes demographic, address, billing, emergency referral, physician, and diagnosis information.
Visit Note	Patient > Calendar > Visit link > Visit Info tab > PRINT button on Note	Creates a PDF of the selected Visit Reason Note.
Print Visit Detail ENT	Patient > Visit Info tab > PRINT button	This feature provides a PDF containing the details of a visit, including basic Patient profile and demographic information, the visit details, audit information, duties performed, notes, and call history.
Patient Statement (V2)	Report > Patients	Displays statements for Patients, one per page in a format which could be printed and sent to the Patient for review. There is an option to displays statements either for Patients with service dates within the selected time frame, or to display statements for all Patients with open trans-

Patient Reports Definitions		
		actions. This invoice format is primarily used for Private Pay Patients.
Emergency Contacts	Report > Patients	Displays desired Patients with their Emergency Contact information.
List of Patients on Vacation	Report > Patients	Displays all Patients who are on vacation for at least 1 day during the selected time frame.
Patient Mailing List Labels	Report > Other Reports > Patient	This report allows users to select Patients by Team, Location, Branch, Creation Date, and/or Status to print mailing list labels.
Patient by Admission (Summary)	Report > Patients	This report provides a summary by contract of the admitted Patient count as well as the hours gained from these admissions, based on Master Week hours.
Plan of Care (POC)	Patient > POC page > PRINT button	This feature provides a PDF of a Patient's Plan of Care, with a header containing basic Patient/POC information
Patients with no POC (Ent)	Report > Patients	Displays Patients with no Plan of Care (POC) on record (or with an expired POC). This report may be run for a single contract and/or Coordinator.
Interim Order	Patient > Interim Order tab > PRINT button	This report provides a printed version of the selected Interim Order. Note that selecting this option changes the status of the Interim Order to 'Printed'.
MD Orders Due	Report > Patients	Displays a list of Patients with no MD Orders within the specified time frame, or a list of Patients whose Order due date is within the specified time period.
MD Order Due (Based on 485)	Report > Patients > Clinical	This report tracks 485's that are due within the specified dates. This report can be run for a single Contract, Nurse, or for Patients with a specific status.
Order Tracking	Action > Order Tracking > VIEW REPORT button	Lists all Patients within an Office that have orders based on the criteria selected. From the search results, specific orders can be selected for print.
Nurse Visit Due	Report > Patients	Report that shows the next nursing visit due based on the 'Visits Due in Days' setup, which is checked against the selected time frame for the report. This report can be run for a single Contract, Coordinator, Discipline and/or Nurse. In addition, exclude a specific skilled Service Code, and select whether to run the report based on confirmed or scheduled visits.
Nurse Visit Due v2	Report > Patient	This report is like the Nurse Visit Due report, but additionally sorts by Patient and includes additional information for each Patient. The report also displays the week schedule for each scheduled Caregiver for that Patient.
Patient General Notes	Report > Events	Replaced with Patient General Notes (New)
Emergency Census	Report > Patients	Provides a list of Patients including their Evacuation

Patient Reports Definitions		
		and Emergency Preparedness information. It also displays information such as the Patient's Emergency Contact Information, Evacuation Zones, Mobility Status, and electric Equipment Dependency.
Emergency Kardex	Report > Patients	This form-format report provides a quick reference to the particular needs of each Patient for certain aspects of nursing care to be used in the event of an emergency evacuation. Kardex includes information pertaining to schedule of medications, mental status, diagnosis, advance directives, dietary needs, as well as physician and pharmacy information.
Active Patients Without Schedule	Report > Other Reports	Lists Patients with active status that are not scheduled during the specified dates. There is an option to include Last Scheduled Date, Last Confirmed Visit Date, and the Service Code in the report.
On Call by Coordinator	Report > Patients	Provides all Patients who are scheduled with a Caregiver for the default Coordinator for that username.
List of Patients Admitted	Report > Other Reports > Old DOH	Lists Patients admitted during the selected time frame, as well as the Patient's address and phone number, and referral information
Patient Weekly Schedule	Report > Other Reports > Schedule	Lists Patients scheduled for a week selected by user, grouped by Patient to include Patient Contract. Lists multiple Caregivers separately with their scheduled time and days of the week.
Print Patient Calendar	Report > Patients	Prints multiple Patient calendars, gathering all relevant Patients based on filters, and allowing user to choose which Patients' schedules to print.
Merged Patients Report	Report > Patients > Merged Patients Report	Report provides a list of Patients who qualify to be merged into a UPR Profile as well as a list of Patients who have already been merged into a UPR Profile.
Document Management Report	Report > Patients > Document Management Report	Provides a list of all documents housed in the Patient Document Management page.

Compliance Reports Definitions

Compliance Reports Definitions		
Report Name	Path	Definition
Duty Sheet Compliance	Report > Compliance	Lists all confirmed visits within the given visit date range and are less than/greater than the specified number of scheduled hours. Visit details are provided, including the number of duties performed. This report may be run for a single Contract, Coordinator, Duty Category, or Caregiver Team.
Duty Sheet by Visit Date	Report > Compliance	Prints the duty sheets for visits within the visit times specified. A sub-report is generated for each Patient
Exclusion List Report	Report > Compliance	Lists the exclusion list checks with results for each employee.
Patients with 3 Consecutive Unverified Visits	Report > Compliance	Displays a list of Patients that have at least three consecutive unverified visits within the date range specified. The report shows the first and last date associated with these visits.
Unverified Visits Aging Detail	Report > Compliance	Provides a list of visits with visit dates during the specified time frame that are not yet verified hence not yet billed, with the option to exclude non-billable visits. Aging information is included for each visit, along with an aging summary.
Patients with 3 Missed Visits	Report > Compliance	This report lists Patients with missed visits within the selected time frame in two sections as follows: The first section shows Patients with 3 missed visits on consecutive days. The second section lists Patients with at least 3 missed visits in one week. The week is defined in this report as Saturday through Friday.
Restricted Caregivers	Report > Compliance	List of linked Caregivers that are restricted, and the contracts for which they are restricted.
List of Training Schools	Report > Compliance > Training Schools	Lists the training schools from the HHAExchange master list accepted by each office.
Caregivers by Training School (Ent)	Report > Compliance > Training Schools	This report lists Caregiver certified by the selected training school. The training school may be selected by clicking the “?” link.
Billed Visits With Invalid Training School	Report > Compliance > Training Schools	Lists all billed visits for which the Caregiver has a certificate from a school that has been closed or is not in the accepted list of training schools.
Scheduled Visits With Invalid Training School	Report > Compliance > Training Schools	Lists the scheduled visits for which the Caregiver has a certificate from a school has been closed or is not in the accepted list of training schools.
Restricted Caregivers	Report > Compliance	This report checks for Caregivers that are restricted based on the Start and End dates specified on the restrictions defined on the Caregiver > Absences/Restrictions page.
POC Compliance Report	Report > Compliance	Displays POC compliance information for each Patient and Caregiver combination. The tasks performed by each Caregiver are

Compliance Reports Definitions		
		compared to those required in the POC; the number of tasks performed and a percentage of tasks performed based on the minimum required are displayed. Missed visits do not contribute to the total required. If tasks are performed that are not in the Patient POC, these are included in a separate section.
In Service Due By Hire Date	Report > Other Reports	Displays all Caregivers with less than 12 hours of in services, based on anniversary date. The report can be run to display Caregivers who are currently not compliant, or will be out of compliance in one, two or three months.
Virginia State Medicaid Duty Sheet	Report > Compliance > Virginia State Medicaid Duty Sheet	Duty Sheet specifically for the Virginia Medicaid Market.
Flu Vaccine Report	Report > Compliance	This report displays the Caregiver's flu vaccine status with a flu vaccine date within the specified time period. This report may be grouped by contract.

DOH Reports Definitions

DOH Reports Definitions		
Report Name	Path	Definition
Contract Revenue Report	Report > DOH	Report for the DOH that provides a revenue summary for the specified time frame, by contract broken down by Discipline.
Patient Form	Report > DOH	Report for the DOH that summarizes census counts and discharge statistics for the specified time frame. This report may be generated for all contracts or a single contract.
Contract Service by County	Report > DOH	This DOH report provides, for each county, Patient, visit and visit hour totals for all contracts.
Services by County	Report > DOH	For the purpose of DOH reporting, this report tallies the number of Patients with visits by county, then by Discipline in the time frame specified. This report also breaks down these statistics into age and gender groupings.
DOH Caregiver Sub-Contracting	Report > DOH > Archived Report	This DOH report lists the total number of billed hours and the rate per hour by service code for each contract, for billed visits within the specified time frame. Live-Ins are counted as 13 hours.
DOH COVID-19 LHCSA Report	Report > DOH > DOH COVID-19 LHCSA Report	This DOH report is a questionnaire regarding COVID-19, completed by HHA for LHCSAs.
DOH Cost Report	Report > DOH > DOH Cost Report	A suite of reports to assist Providers to complete the DOH Cost Report. Refer to the DOH Cost Report Guide for more information about each specific report in the suite.

Sales Reports Definitions

Sales Reports Definitions		
Report Name	Path	Definition
Billing by Contract Summary	Report > Sales	This report displays the total hours, number of visits, and amounts billed per contract during the selected invoice and visit date ranges. This report may be run for a specific Coordinator, with several grouping options.
Billing by Contract Detail	Report > Sales	This report provides detailed invoice information for the specific invoice or visit date range. This report may also be limited to invoices for a specific Contract, Discipline, and Service Code.
Invoice List Summary	Report > Sales	Summary list of invoices either generated within the specified time frame, or for visits within the specified time frame. This report also can be run for a specific batch, Contract and/or Patient.
Invoice List Detail	report > Sales	Lists all visits within either the specified invoices dates or the specified visit dates. Patient, schedule and invoice information is displayed for each visit.
Unbilled Visit per Contract	Report > Sales	Lists scheduled visits that have not been billed, including scheduled times, and visit time and hours if visit was confirmed. This report may be run for a single contract.
Billing Summary Month to Month	Report > Sales	This report displays a billing summary per month, per contract for the selected year.
Referral Contact	Report > Referral Reports	Displays billed hours summarized by referral person and provides a detail view by referral person of individual visits.
Submission Status Report	Report > Referral Reports	Shows the status of all referrals submitted in the time frame selected.
Referral Intake Stat	Report > Referral Reports	This report shows referral status counts within the selected referral dates. These statistics can be grouped by Referral Source, Referral Contact, Account Manager, or Intake Person. Once the report is generated, the user can dynamically expand each section to see a list of the Referral Names and status.
Billing Summary by Period	Report > Sales	Displays a summary of billed amounts in each period, per contract. This report has the option to select quarter, month, week, 4 weeks, or 2 weeks as the period. If a week option is selected, the report uses the day of the week specified in the To Date filter to define the end of each week. The report displays amounts for mutual Patients separately, but also has an option to display units of service. In addition, the date filters may be used as either Invoice for visit dates.

Vendor Management Reports Definitions

Vendor Management Reports		
Report Name	Path	Definition
Census - Summary	Report > Vendor Management	Report that shows Census by contract, run either by active schedule, master week, or next 7 days.
Census - Detail	Report > Vendor Management	Displays a list of Patients with census defined by either active schedule, master week, or next seven days.
Placement Report (Detail) (New)	Report > Vendor Management	List of Patient placements created within the specified time frame. This report can also be run for a specific placement status.
Placements denied by Vendor	Report > Vendor Management	Lists all placements denied by the Agency and the reason for the denial.
Placement Report (Summary) (New)	Report > Vendor Management	This report displays a summary count of all placements offered, accepted, denied, and timed out, for the timeframe selected.
Care Insights Administrative	Report > Vendor Management > Care Insights Administrative	Provides the confirmed and unconfirmed measures for a visit; for Agencies participating in Care Insights.

Miscellaneous Reports Definitions

Miscellaneous Reports Definitions		
Report Name	Path	Definition
List of Physicians	Report > Other Reports	Displays a list all the physicians entered in the system.
Patient Physicians	Report > Other Reports > Patient	Displays all Patients with their assigned physicians.
Contract Rates	Report > Other Reports	Displays all the contract rates that are setup in the system. This report can be run for a single Contract, Discipline, Service Code, or rate status.
Log On	Report > Other Reports	Lists the HHAX log in/out activity of users during the specified time frame.
CIN Rejection File Report	Report > Other Reports	This report lists visits that were rejected by VNS.
Eligibility Report	Report > Other Reports	This report displays the results of past Eligibility Checks.
Operation Worklist Report	Report > Operation Worklist > Operation Worklist Report	This report displays the expiring Medical / Other Compliance Items for single and multiple Caregivers. This report can be run with Expiration Date filters and task status.

Clinical Reports Definitions

Clinical Reports Definitions <i>Only available with the Clinical Module*</i>		
Report Name	Path	Definition
Clinical Visits Scheduled (No Documentation)	Report > Other Reports	Definition coming soon. This report is permission-based. If not visible by the Agency, then permission must be requested from the HHAX Support Team .
Nursing Visit Due	Report > Other Reports	Lists each Patients next required Nursing Visit based on the value for the Nursing Visit Due (In Days) field of the Patient Clinical Info page.
Clinical Due	Report > Patients > Clinical > Clinical Due	Report provides dates for the next Clinical visit. The clinical dates can be based on the last scheduled clinical visit or the last confirmed clinical visit. The number of days between visits is based on the Nurse Visit Due field in the Patient <i>Clinical Info</i> page.
Clinical Documentations Report	Report > Patients > Clinical > Clinical Documentations Report	This report includes a Patient's visits with clinical documents uploaded via Forms Builder method.