

# Top 10 Key Reports For Agency Owners



## 1. Employee Retention

Are you losing caregivers? How long are they staying with you? Keep an eye on the needs of your caregivers and see what your agency is doing right (and where you can improve).



## 2. New Client Pipeline and Referrals Report

A holistic view of your client pipeline over months or years or custom ranges. Find out exactly where your clients are coming from, and who is referring them. This can help you nurture reliable referral sources, or bolster those that seem to be lagging behind.



## 3. Client Satisfaction

Tracking positive and negative feedback from clients via feedback reports helps you to see what's going right, and what could use tweaking.



## 4. Hospitalizations/Worsening Outcomes

As VBP becomes more common, these reports provide proof of strong client outcomes at both broad and individual levels.



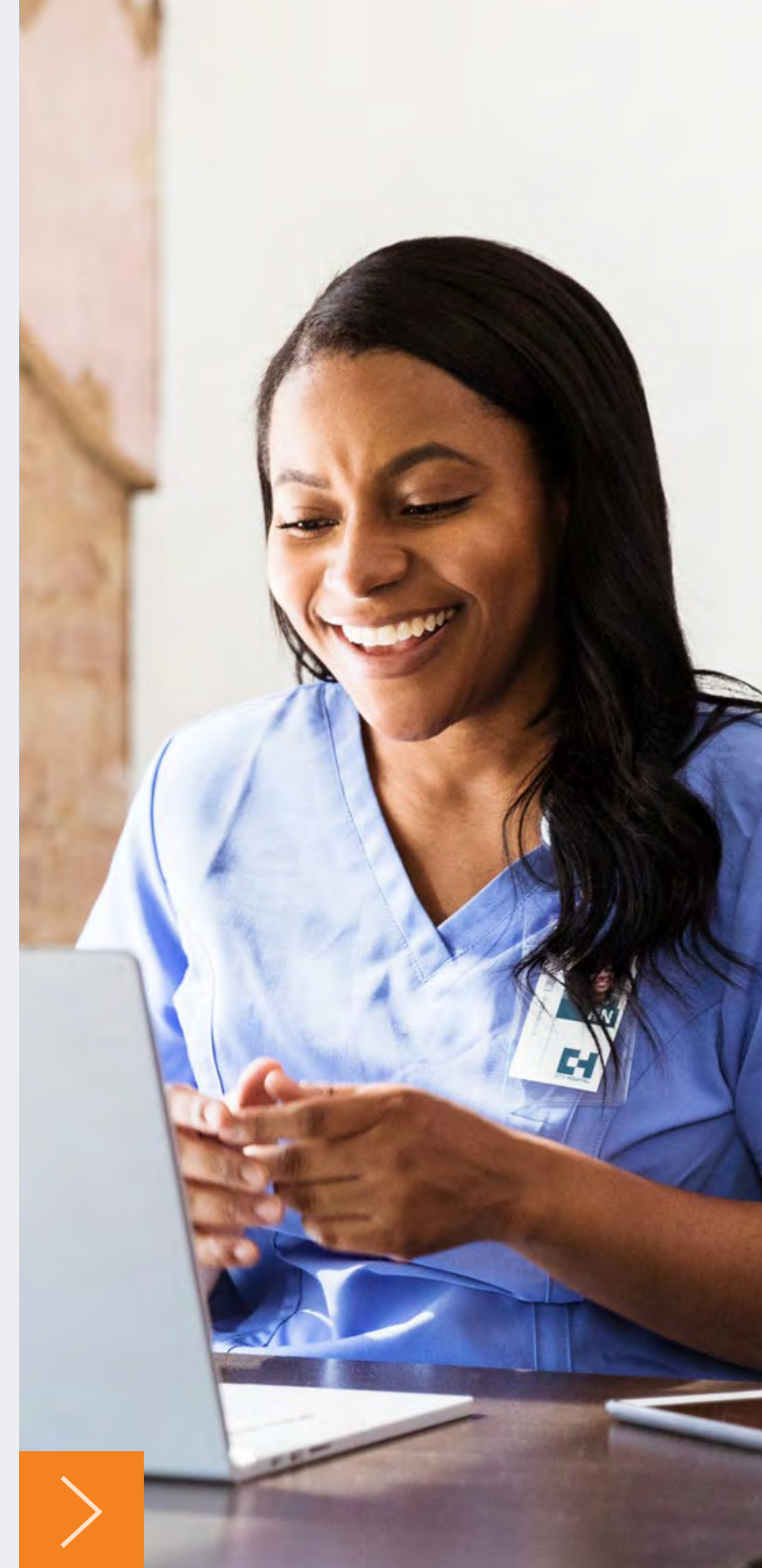
## 5. Care Plan Adherence

Tracking task completion to ensure that caregivers are completing their visit requirements, and easily see if clients' care plan goals are being met. Essential for VBP



## 6. Location or Department Performance

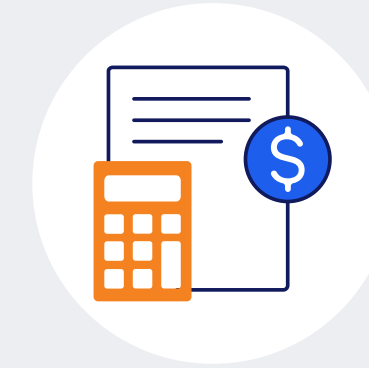
These reports reveal what each department is clocking, specifics about caregiver hours, and much more. If you have multiple offices, this dataset can help you identify high or low demand and make informed decisions.







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## 7. Premium, Mileage, and Overtime

Track your budgetary line items to find where small changes can be made to cut costs without negatively impacting the performance of your staff.



## 8. Margin

These offer insight into caregiver mileage and overtime hours, with a detailed view of which client visits in which districts are costing at the margins of spreadsheets. Essential for any M&A activity.



## 9. New Client Status

How are new clients transitioning from status to status? You could generate reports that reveal Active, On-Hold, Discharged, and Waiting List – and both spot and correct any lags in the process to ensure new clients are moving efficiently through your intake channel.



## 10. Labor Cost Analysis

What is your cost per hire? What about turnover? How well is your payment system working?