



Top 17 Reports for Home Care Agencies to Pull Now - For Big Gains Later

Better Technology, Better Outcomes.

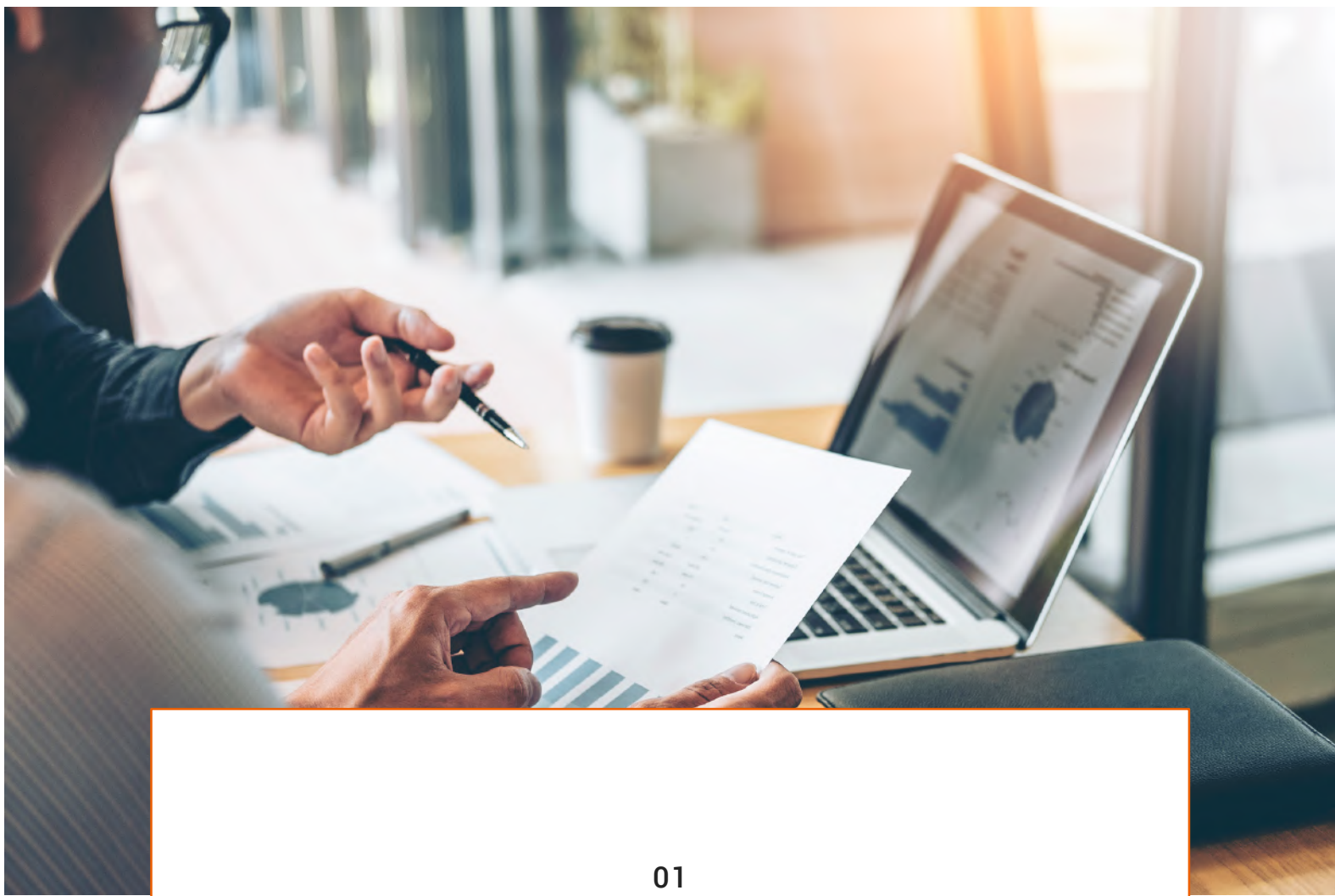
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01

INTRODUCTION

Introduction

Data is like the foundation of a house – or in this case, a home and community care agency. It is the critical underpinning that props up the ability to make smart, efficient decisions.

Yet, data is virtually useless without context. Its limitless potential only comes when raw metrics are transformed into information – and then into knowledge and insight that opens up repeated doors to success.

The power of data exploration is already evident in most corridors of health care. In home care, data mining and measurement can yield a deep array of reporting possibilities. Any software solution worth its salt must offer the capacity to unearth, filter and export reams of data into powerful reports that agencies can use to identify key trends, flag important issues, and predict cost-savings, staffing needs and much more – even years into the future.

Think of these reports as taking data points and elevating them to actual wisdom that can help benchmark not only against past work, but against the competitive landscape too, ultimately driving a business forward.

To get the conversation started, we started with a list of the top 10 reports but couldn't ignore the additional 7. With that being said, here is our list of 17 reports that can enable any private duty home care agency to do more for clients, staff and the business itself – simply by analyzing the data already at hand.





02

FILE UNDER: REFERRALS & INTAKE

File Under:

Referrals & Intake

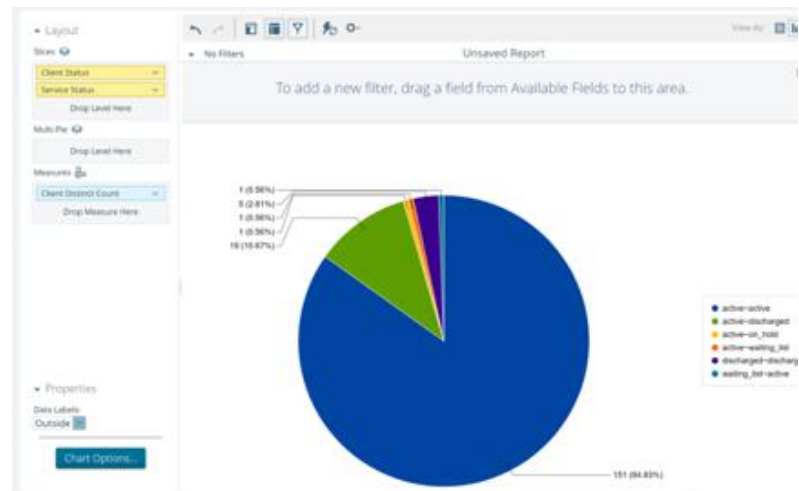
1. New client status reports

Referrals and intake is clearly an important part of any agency's business. Data can reveal how long a new client moves from status to status within an agency's administrative back-end. As with everything in this list, it's vital to catch and record key stops along the journey of intaking a new client.

AlayaCare's software includes four key client statuses:

- a) Active
- b) On hold
- c) Discharged
- d) Waiting list

When these metrics are captured across the board for all new clients, it's easy to develop new client status reports. If an agency gets 100 referrals each month, it could easily assess how long it's taking to funnel clients through these stages. Agencies could flag specific action items to combat any lags in the process, so new clients are welcomed in a timely manner. What is the time between point a and point e in the above list? Knowing the answer is an effective way to assess the conversion and care for clients new to any agency.



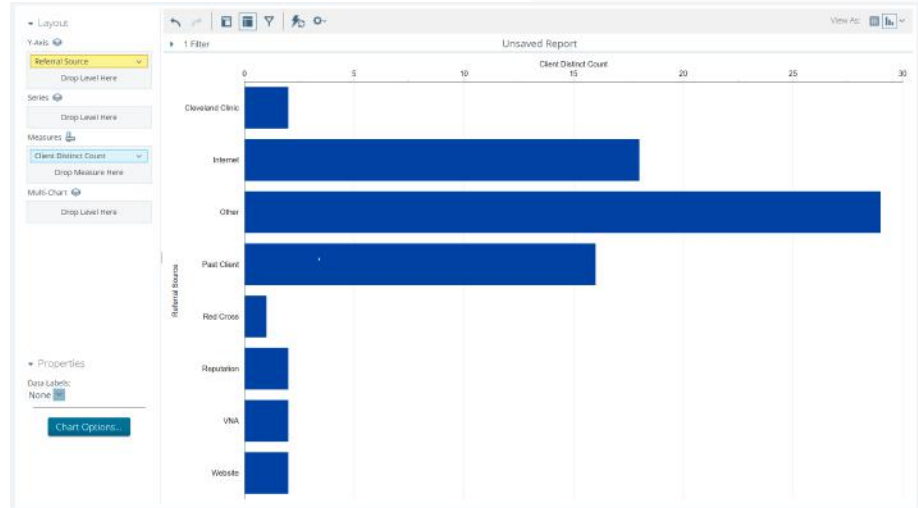
2. New client pipeline and referrals report

Gaining a holistic view of a client pipeline and referrals over months or years can offer an important look at exactly where clients are coming from, when, and through whom. Is there a particular search engine that is funnelling through the majority of new clients? Are family and friends of other clients responsible for significant number – or are they not, and why? How do health-care practitioners in the community factor into the equation?

File Under:

Referrals & Intake

Reports that allow an agency to customize and track referral sources offer invaluable insights into how clients come on board – and what can be done to nurture that pipeline, while simultaneously boosting others. Not to mention being able to track the pace of new clients over time and spotting any lucrative trends.





03

FILE UNDER: MANAGING CARE WORKERS

File Under:

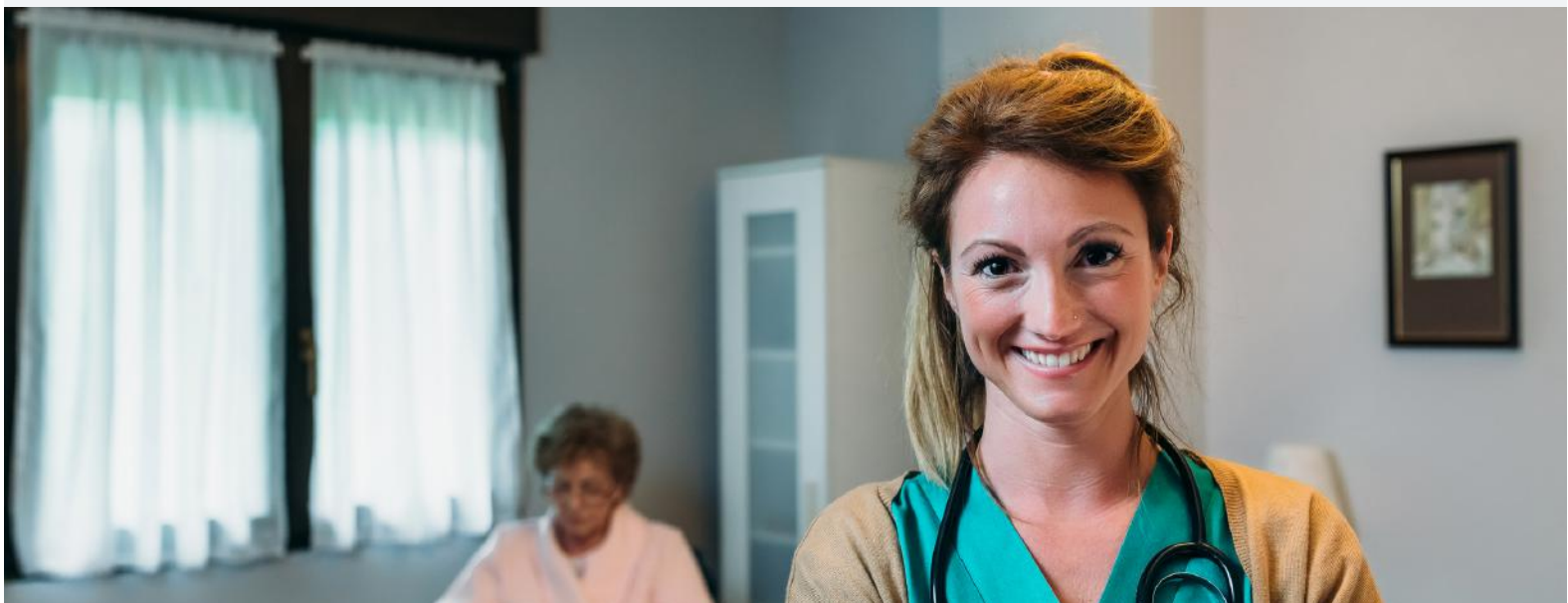
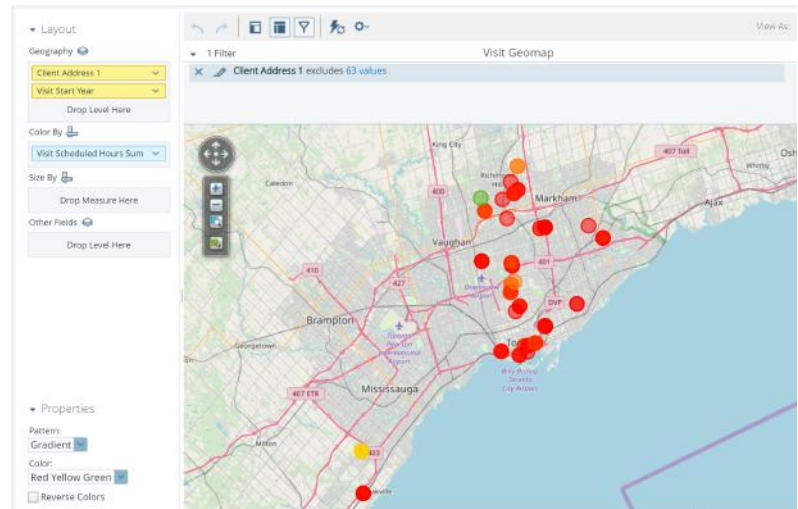
Managing Care Workers

3. Supply & Demand Heat Map

In an era where attracting and retaining top talent is a major concern for our industry, streamlining schedules and ensuring maximum hours worked most efficiently can truly drive employee satisfaction. While capturing missed and late visits is valuable and necessary, just as important is having a robust understanding of supply and demand hot spots throughout an agency's service area.

Consider creating a *heat map* – a color-coded representation of variance between supply and demand of resources across any number of regions. Imagine the value in understanding just how many more visits or specific services are scheduled in one county over another, at certain times of the day, month or year?

A heat map delivers valuable metrics that can serve to predict where staffing may be over- or under-served, or where there is a greater need for specific care provider skills. That insight could enable schedulers and coordinators to reorganize based on demand and also inform hiring managers of where they should ramp-up in recruiting – all to ensure seamless client care.



File Under:

Managing Care Workers

4. Shift Offer Report

Efficient home care software should be managing shift offers to field staff, making the task of schedulers easier and reducing the amount of vacant, late or missed visits. Shift offer functionality informs caregivers in real-time of any available shifts through mobile messaging alerts – giving them the flexibility to pick up additional client visits if it fits with their day or week. Based on responses, schedulers can assign last minute vacant visits to those caregivers who accepted to ensure they are receiving more hours and the client visit is secured.

So, when it comes to generating shift offer reports, an agency could track the rates of acceptance and rejection by care worker. Seeing the forest for the trees here, for one example, may illustrate a nurse or HHA who may be overworked, or potentially unmotivated – and their managers could be proactive about their schedules to generate greater balance. This report also becomes valuable from a human resources perspective, giving you an audit of the number of additional hours offered to each individual employee.

Employee Full Na...	Respons...	Response Comm...	Offer Count
Brady Murphy Agen...	declined	not enough money.	1
Erin Baker	declined	Busy	2
		Family brunch	1
		I'm away this weeke...	1
		Unavailable	2
Sean Hill	declined	Dinner time	1
Tim Van Meer	declined	No	5
		No way	1
		Not able to	1
		Not around to take it	1
		Not interested	1
		Refused	2

5. Client feedback report

Client feedback, whether positive or negative, is a telling data point to capture. It helps ensure an agency is listening to what clients need and quickly respond with changes where necessary. AlayaCare enables agencies to run reports that track client feedback by name and date, revealing patterns in care and identifying simmering issues before they spark into major ones.

On the flip side, a wealth of positive feedback can be a highly motivating tool for top-performing caregivers, resulting in a domino effect: the happier the caregiver, the happier the clients, and the more referrals flow through. A win/win for business.

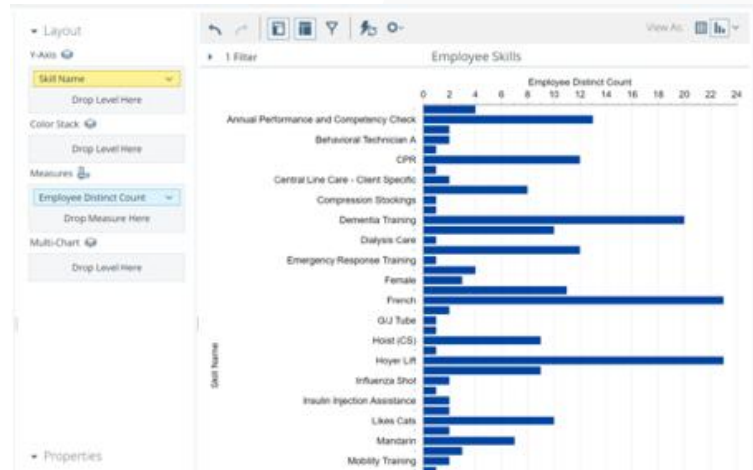
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Managing Care Workers

6. Skills and competencies report

Nurses and caregivers with specialized credentials – anywhere from infusion therapy to training in dementia care – are in great demand and highly coveted for clients who need such specialized support. Knowing how many clients require such care and when these caregivers will most be in demand is invaluable to matching the right caregiver with the right client.

Keeping track of when professional certifications expire – and when new staff onboard carrying specific skills – is also an important metric that should easily be pulled through a home care software system’s reporting function. This ensures an agency’s caregivers have up-to-date training and the necessary credentials while aligning client needs with staff availability.



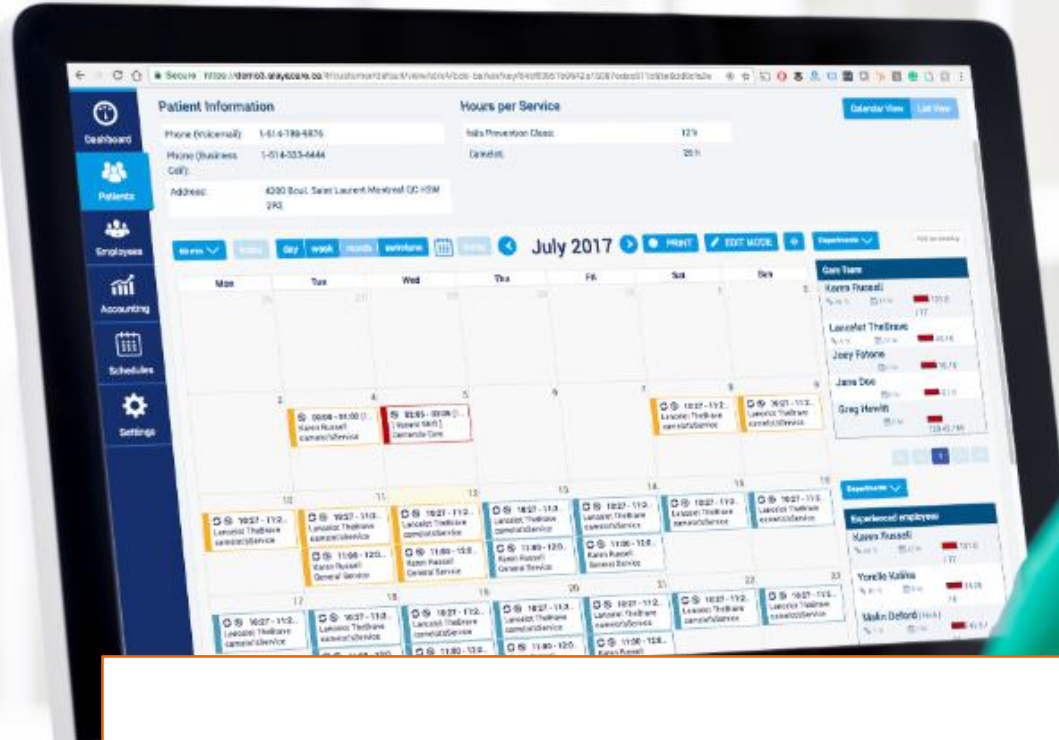
The 'Punch In Vs Scheduled' report is a table showing employee data. The x-axis represents the 'Employee District Count' from 0 to 24. The y-axis lists skills such as 'Annual Performance and Competency Check', 'Behavioral Technician A', 'CPR', 'Central Line Care - Client Specific', 'Compression Stockings', 'Dementia Training', 'Dialysis Care', 'Emergency Response Training', 'Female', 'French', 'GU Tube', 'Host (CS)', 'Hoyer Lift', 'Influenza Shot', 'Insulin Injection Assistance', 'Live Calls', 'Mantarin', and 'Mobility Training'. The bars indicate the number of employees for each skill.

Employee Full Name	Visit Scheduled Hours Sum	Visit Punched Hours Sum	Punch In Percentage
Brady Murphy Agency	3,913.41	206.68	5.28%
Cathy Davis	2,860.25	1.49	0.05%
Chad Nicholson	1,199	0	0.00%
Darbury Agency	2,994	0.95	0.04%
David Smith	214.56	0	0.00%
Deborah Mobile	377.22	2.23	0.59%
Diane Hart	341.5	0	0.00%
Drew West	237	0.17	0.07%
Erin Baker	254.25	341.63	134.37%
Jimmy Van Meer	5,734.5	170.15	2.97%
Lisa Clinical Manager	1,177.25	0	0.00%
Michelle Cashwell	1,887.64	0.53	0.03%
Michelle Kukanski	1,328	0	0.00%
Rebecca Mobile	1,423.25	366.04	25.72%
Sean Hill	1,005.5	1,535.95	152.75%
Suzy Matthews	1,890.92	0	0.00%
Tim Van Meer	1,396.41	5,474.86	392.07%
Vince Carter	575.5	20.27	3.52%
Zarah Von Schober	121.75	0	0.00%

7. Mobile app usage reports

Eliminating paper must be priority No. 1 for modern agencies looking to keep pace with the demands of an evolving industry. It’s important to ensure that when new software is on-boarded, staff members including all caregivers are fully aware of all valuable features and are actively using them in short order for their particular roles.

Mobile app usage reports can translate usage data into insights that show just how many employees are indeed using the software as intended. The reports will also show what features are being accessed, making it easy to course-correct and ensure compliance.



04

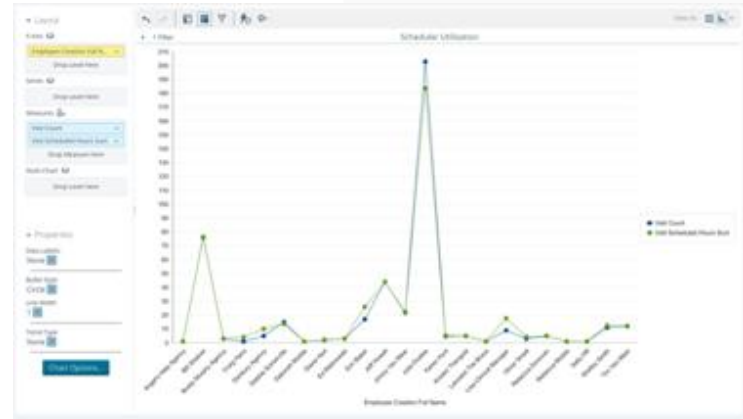
FILE UNDER: SCHEDULING & COORDINATION

File Under:

Scheduling & Coordination

8. Scheduler utilization reports

Schedulers have their own unique demands, and modern software solutions allow for the ability to pull reports that compare the average number of hours that all schedulers clock in order to determine if and where there are outliers, in turn quelling burnout and shifting responsibilities to others who may have more bandwidth. In fact, technology when positioned correctly can make scheduling so efficient, it is possible to employ far fewer schedulers than in an agency utilizing paper-based solutions alone.



9. Location or department performance

Tracking the total number of visits and hours of service can be about much more than visit verification. Rich data can feed robust reports that reveal what each department or location is clocking, as well as specifics around HHA and nurse hours, and much more. The more offices an agency has, the more valuable this report becomes, as it can give you greater insight into agencies or specific services experiencing high or low demand, enabling you to make informed business decisions as needed.



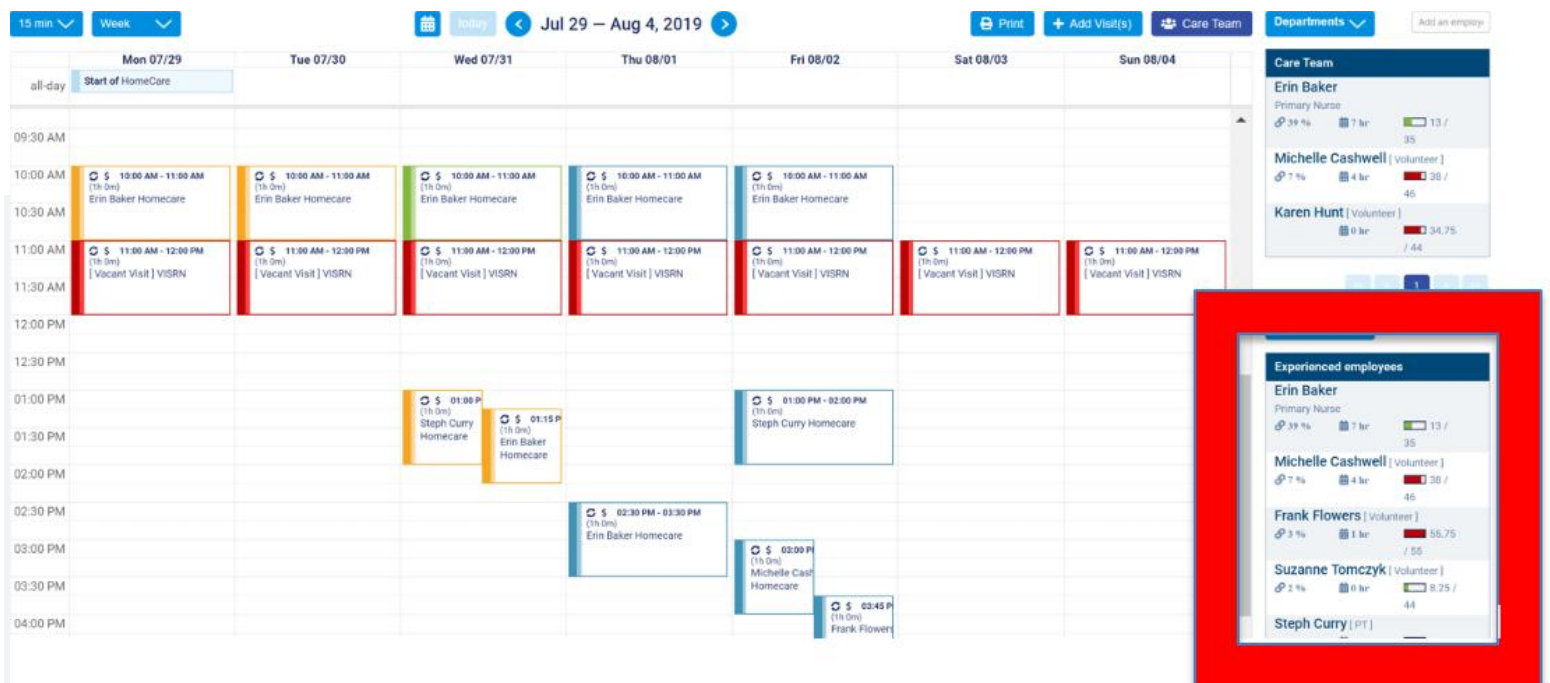
File Under:

Scheduling & Coordination

10. Continuity of care reports

Client-caregiver chemistry is an incredibly important driver in supporting positive client outcomes. Particularly in a time when client-directed care is beginning to take hold, continuity of care is an equal factor in good care as the actual care itself.

Aside from obvious factors such as certifications and qualifications required to manage certain chronic diseases and administer medications, continuity of care promotes camaraderie and efficiency, too. Reports, like those produced by AlayaCare, enable a holistic look at a client's caregivers, which in turn allows agencies to set benchmarks for acceptable matchups.





05

FILE UNDER: CLIENT OUTCOMES

File Under:

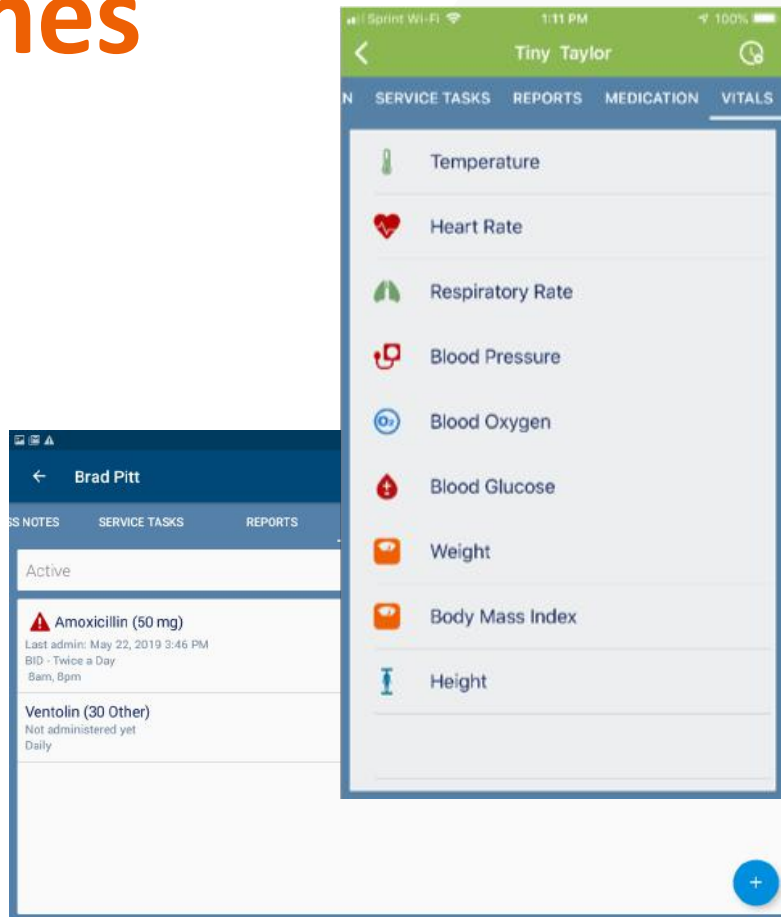
Client Outcomes

11. Care plan adherence reports

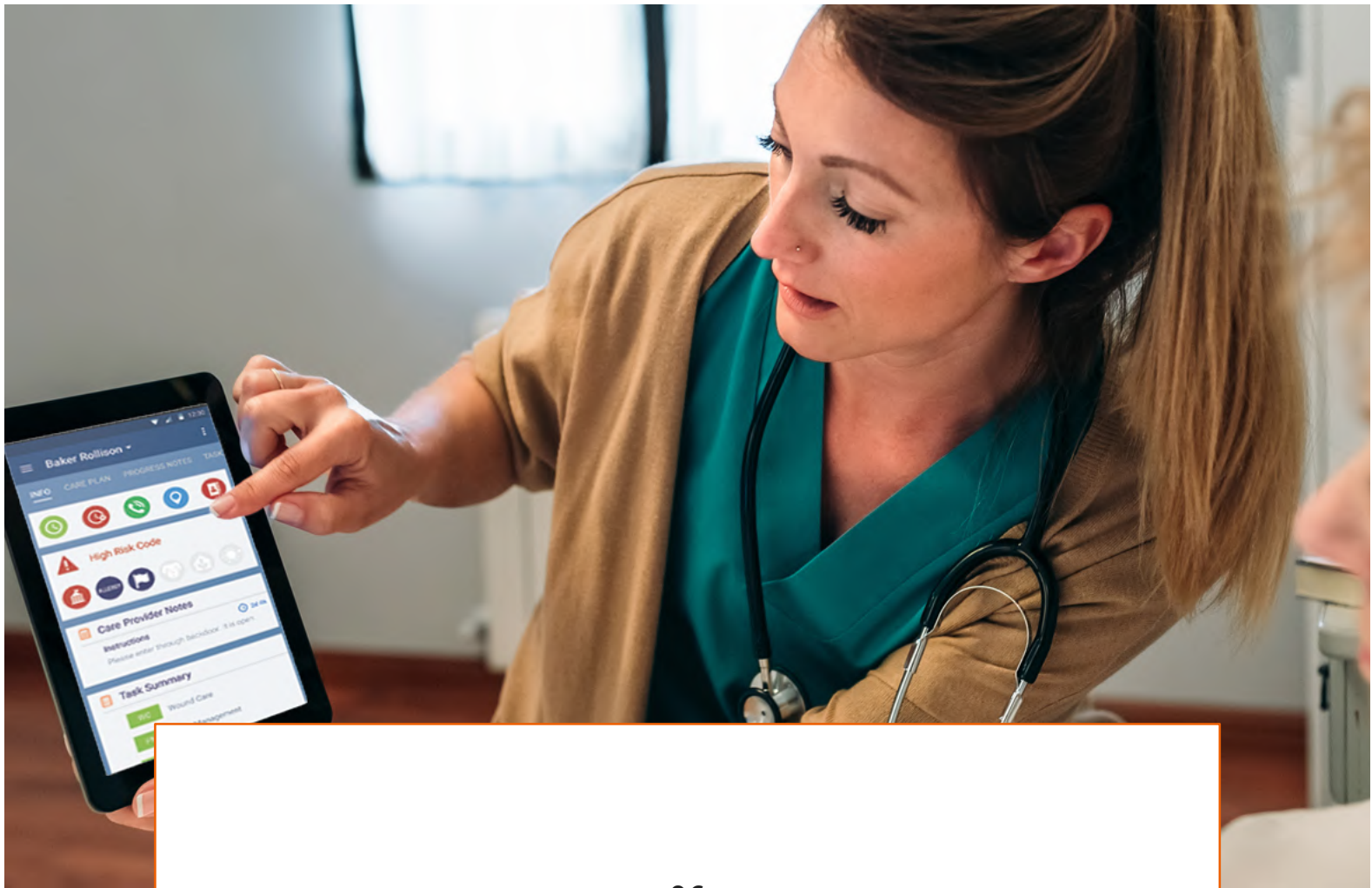
Client outcomes are directly tied to an individualized care plan that is operable and followed. In home care, activities of daily living (which we all know as ADLs) are a vital tool to understand each client's care needs. Care plan adherence reports will reveal ADL and task completion and show which care workers are consistently following visit requirements and performing necessary ADLs. This one is all about ensuring that top-quality care is a promise fulfilled by an agency. Following on the same thread, agencies can have their fingers on each individual care plan they are tasked to service. They can track how clients are doing at any given time, in terms of whether weekly care plan goals are being met and long-term goals are on track – as well as outcomes.

12. Client vitals reports

Digging further into whether client care plans are being followed is keeping track over time of the progression of client vitals. Such information will position an agency as one that has the lens of client outcomes firmly entrenched in its mission.



Such data is readily available when a software suite includes a proven remote patient monitoring (RPM) element, like the [AlayaCare platform](#) does. RPM can help agencies succeed in preventing unnecessary emergency department visits and even hospital readmissions among its client base who live with chronic illness. Such monitoring plans fold into client care plans – and produce vitals reports that, for starters, can verify if RPM is performing as expected, and that clients are indeed improving (or at least not worsening) over time.



06

FILE UNDER: VERIFYING & APPROVING VISITS

File Under:

Verifying & Approving Visits

13. Visit approval reports

The closer an agency's shift approval mechanism comes to clockwork, the better for all. Visit approval reports can detail patterns over time and point to any suboptimal trends that may affect schedulers and caregivers in the field. Possessing details in your home care system such as the percentage of visits that are approved as compared to the visits that require manual inspection prior to approval can reveal trends of visits or care providers that require more oversight than others.

14. Visit variance reports

As any agency is well aware, tracking service hours is a business imperative. Hours worked = hours paid. Specialized reports can enable agencies to filter hours by daily, monthly or custom periods, making it easy to track each worker's capacity, flag performance and, if necessary, spread hours over a day. It can even detect those who are doing far more than their share – and who are at possible risk of burnout, which is a very real concern that can have far-reaching consequences across the spectrum of care.

With visit time reports, it's possible to see the variance of clock-in time vs. scheduled time and plot the most on-time employees. This opens opportunities to reward top performing caregivers, an important consideration for recruiting and retention.



Client	Funder	Payer	Invoice #	Date	Visits	Premiums	Billed Hours	Billed by Visit	Total Amount	Balance	Status	Bill Date
	MH		#3550	2017-08-25	1	0	1.0	0.0	\$21.60	\$21.60	Draft	2017
Jesse Jones	PRIVATE	Weddnu LbgzeyAh	#3549	2017-08-25	1	0	0.75	0.0	\$84.75	\$84.75	Draft	2017
Peter Powers	South		#3548	2017-08-25	1	0	0.25	0.0	\$13.50	\$13.50	Draft	2017
	MOHLTC	Ministry of Health and Long-term Care	#3547	2017-08-25	1	0	0.0	0.0	\$0.00	\$0.00	Void	2017
	North	North Fund	#3546	2017-08-25	1	0	0.0	1.0	\$110.00	\$110.00	Draft	2017
Karen Saunders	South		#3545	2017-08-23	2	0	1.78	0.0	\$96.12	\$96.12	Draft	Ad H
Sal Almeida	Private	Sal Almeida	#3544	2017-08-23	1	0	0.5	0.0	\$20.00	\$20.00	Draft	2017
Denis Red	PRIVATE	Denis Red	#3543	2017-08-23	1	0	0.75	0.0	\$84.75	\$84.75	Draft	2017
Rob Burton	South		#3542	2017-08-23	1	0	1.25	0.0	\$67.50	\$67.50	Draft	2017
Peter Powers	South		#3541	2017-08-23	1	0	0.25	0.0	\$13.50	\$13.50	Draft	2017

07

FILE UNDER: BILLING & PAYROLL

File Under:

Billing & Payroll

15. Premium, mileage and overtime reports

Certain budgetary line items can really start to compound and have an undue impact over the long term. Agencies can pull a report at any time to investigate a number of such items – payroll premiums, mileage spent, overtime pay – and identify where small changes could cut costs while ensuring staff are able to perform their roles more efficiently. (On that last note, such strategies start to materialize when multiple reports from that list are looked at through the same lens.) Overtime in particular can escalate quickly, but reports built on data that measure overtime within each unit will show where additional hours are being clocked in general.

16. Margin reports

Financial departments pay close attention to the margins, where gains are often won or lost. Metrics can fuel different reports that offer specific perspectives depending on what an agency is after. Gross margin reports can be pulled, complete with caregiver mileage and overtime hours baked right in. Or, how about a margin report for every single visit in a day or a week or a month? Those are available as well for a close lens on what client visits in any particular district are costing at the margins of spreadsheets.

Client Full Name	Service Code	Invoice Item Amount Sum	Margin Sum
		2,407	310.8
Alicia Lovelace	OT	1,735.50	205.02
	SQL - FHW	330	340
Adam Apple	CDM	822.89	509.69
	Tax C	1,366	204.61
Adam Powell	Homecare	842	238
	Homecare	842	288
Alan Tinkels	Working	30	32
Alie Linger	Homecare Respite	1,790	479
Anthony Munoz	House Visit	400	400
	MOW	4,826.21	1,376.21
Arnell Rappert	PHYSIC J	30	25
	SLDFP	302	32
Berry Sanders	Homecare	90	90
	Homecare	90	27
Devin Powell	Homecare Respite	2,480	720
	Working	690	1,081.78
Billy Smith	CDM	57.5	32.3
	CDM	774.91	294.91
Billy Brown	Working	750	842.11
	PHYSIC	402	402
Brad Pitt	Adult Day Program	70	30
	Homecare	1,747	340
	WSPH	558	910.87
	OT	730	240
Brenda Cooper	PT	1,405.2	294.2
	SPCH & NG THERP	608.31	66.31
	Vocational Rehab	467.85	78.77
Carl Robinson	Homecare	230	70
	Homecare Respite	1,290	376
Charal Price	LTR	8,016.17	2,896.17

And for those agencies looking to get acquired, well, the greater the margin the greater the multipliers will be.

17. Banked units report

Depending on an agency's location, regulators may permit unit "banking" – which prevents missing out on reimbursements due to half or quarter units that can't be submitted, despite paying for that time. While some agencies manually bank units by rounding to the nearest whole number, AlayaCare's [electronic billing module](#) enables staff to option banked time for each bill code or client, and assemble all fractional hours into whole units with the click of a button.

Pulling reports that provide an analysis of the potential units to bank and having a birds eye view of overall reimbursements can agencies thousands, and also eliminate inefficient workflows.

A solution for all your reporting needs

Exploring your agency's treasure trove of information means everyone and everything is looked after: office staff, caregivers on the road, clients, and the agency's future.

With AlayaCare's [Data Exploration](#) and Custom Dashboard features, your agency has all the tools to pull meaningful reports and insights to the forefront. Whether you're customizing the KPIs or adding a report among those you have built in Data Exploration, you can now rest assured knowing you can structure your dashboard in a way that aligns to the way your business thinks and operates.



Start pulling the reports you need to achieve your goals today

AlayaCare offers the #1 home care reporting
platform in the industry.

Request a demo of the platform today too see
our home care reporting software in action and
learn how we can help you gain insight into your
data to improve efficiency, and ultimately client
outcomes.

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