

OR PTC DCI VERSION 2.1



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Disclaimer

The content found in this document is intended for staff using the OR PTC DCI system.

Canned Reports

The OR PTC DCI Reports Module includes over 80 canned reports and is accessible to State or AAA users. The data in each report is limited to the cost center(s) over which the user has a role. For a full list of all reports available, see <u>Appendix A: Full List of Canned Reports</u>.

Note: A canned report is a report that comes standard with the DCI software. Canned reports are valuable because they allow users to gather data pertaining to their cost center.

DIRECT CARE INNOVATIONS	HOME	AUTHORIZATION	REPORTS
DASHBOARD		Reports / Dashboar	rd
COA REPORTS		AUTO APPROVAL RE	PORT
AUTHORIZATION REPO	ORTS	PUNCH ENTRIES REI	PORT
MANAGEMENT REPOR	TS	PUNCH ENTRY DETA REPORT	AILS
PAYROLL REPORTS		SERVICE ACCOUNTS	5
BILLING REPORTS		REPORT	
PROFILE REPORTS		RESIDENTIAL ATTENDANCE REPO	RT
FUNDING ACCOUNT REPORTS		RESIDENTIAL ABSEN REPORT	ITEE
SETTINGS REPORTS		PARENTING ATTENE	DANCE
EVV REPORTS		REPORT	
TRAINING REPORTS		PARENTING ABSENT REPORT	TEE
AUDITING SYSTEM ACTIVITY REPORTS		DAY ATTENDANCE F	REPORT
BUSINESS RULES REPC	ORTS	GROUP SERVICE ATTENDANCE REPO	RT
CUSTOM FIELDS		MILEAGE ENTRIES D REPORT	ETAILS



Below are examples of information you may want to know and what report you can use to find that information.

Note: COA stands for Chart of Accounts.

I want to know	Report Name	Report Location
How many hours were worked in a Cost Center or by a provider	Punch Entries	COA Reports
When State Users entered punches on behalf of the provider	Punch Entry Details or Late Entry Report	COA Reports/Management Reports
Who has service accounts for my Cost Center	Service Accounts Report	COA Reports
If consumers signed off on punches	Punch Entries	COA Reports
Who approved punches and when were they approved	Punch Entry Details	COA Reports
If a provider is on track to use all their authorized hours by the end of the pay period	Authorization Run Rate	Authorization Reports
If a consumer has active Authorizations	Authorization Entries	Authorization Reports
Which authorizations are expiring soon	Expiring Authorizations	Authorization Reports
How many hours have been worked against an authorization	Authorization Transactions	Authorization Reports
What consumers are assigned to a Cost Center	Client Report	Profile Report
What providers are missing an employee number	Employee Report	Profile Report
How many hours a provider claimed and the statuses of those entries	Punch Entries Details	COA Reports



Canned Reports - How to Search, Filter, and Download

To search for and download a report, after navigating to the appropriate report within the Reports module:

- 1. Enter search criteria (if you want to narrow the scope of the report).
- 2. Click Search.
- 3. Click Download.

							1
02/23/2021			02/25/2021			Select Account Type	¥
Type Client	Name		Type Employee Na	ame		Type Service Code	
Type Cost C	enter		Select Activity		~	Select Status	~
Select Entry	Туре	~					J
Include Car	nceled and Rejec	ted Punches					
						Reset	2 Search
owing 24 out o	of 24 records						wnload
-				General Acti	Employee/	V Employee Num	
ounch ID	Pay We	Date of Serv	Account Type	General Acti	Employee	v Employee rum	Client/ Resi
Punch ID 780	Pay We 9	Date of Serv 02/25/2021	Account Type Client Transpo	General Acti	Provider O		Client/ Resi Consumer Or

- 4. Various columns can be included or excluded using the arrow buttons. To include columns in your download:
 - a. Click the column title in Available Columns.
 - b. Click the right arrow and it will appear in Selected Columns.
 - c. If you selected a column you don't want in your downloaded report, click the column in Selected Columns and click the left facing arrow.
 - d. To download the report with all available columns, click the double right-facing arrow. The columns in Selected Columns will appear on your download in the order they are listed here. You can also drag columns in Selected Columns to change this order.



- 5. After selecting the desired columns, click Next.
- Select a format from the dropdown menu you would like the report downloaded in.
- 7. Click Download.
- 8. When the Alert appears, click Yes.

Search Column	Search		Search Column	Search
Available Co	olumns	Undo	Selected Columns	
		>>>>>>>>>>>>>>>>>>>>>>>>>>>>>>>>>>>>>>	Pay Week	
		•	Account Type	
			General Activity	
		*	Employee/Vendor Name	
		Redo	Employee Number	
			Client/ Residential/ Day Program N	Vame
				5
			Cancel	Next
	Downlo	oad Report Wizard	×	
Columns Options				6
Format: *	Select Format		~	-
Orientation: *	Select Format		6	
	Excel			
	PDF			
	CSV Tab Delimited		7	
Back	Tub Delimited		Inload	
				_
	Dow	vnload Report Wizard		×
Columns Options		Alert	×	
Format: *	Are you sure you v	want to download the report Report ?	- Punch Entries 💙	
Orientation: *		Report?	8 ~	
c		No	Yes	
Back			Cancel Downlo	ad



Canned Report Example

Your report can then be opened in an Excel workbook. For this example, we are using the Notes Report.

				-	-			
	В	С	D	E	F	G	Н	1
1	Gei nployee Number	Pay Rate Name		-	Account Reference			Pay Week
2	890123	Standard	0.00	1.00		Kimber	Hourly	24
3	7890123	Standard	0.00	-0.50		Kimber	Hourly	24
4	7890123	Standard	0.00	0.22		Kimber	Hourly	24
5	7890123	Standard	0.00	-0.08		Kimber	Hourly	24
6	UNIID0002		0.00	5.00		SM Con	Client Transportation	24
7	775123		0.00	12.00		Robert	Hourly	23
8	775123		0.00	12.00		Robert	Hourly	23
9	775123		0.00	12.00		Robert	Hourly	23
10	775123		0.00	12.00		Robert	Hourly	23
11	775123		0.00	12.00		Robert	Hourly	24
12	775123		0.00	0.38		Monica	Hourly	24
13	775123	Standard	0.00	-0.40		Monica	Hourly	24
14	775123		0.00	6.50		Monica	Hourly	24
15	729465	Standard	0.00	4.00		Roman	Hourly	24
16	729465	Standard	0.00	4.00		Roman	Hourly	24
17	745219	Standard	0.00	1.50		Bruce B	Hourly	24
18	745219	Standard	0.00	-2.00		Bruce B	Hourly	24
19	729465	Standard	0.00	0.92		Roman	Hourly	24
20	775123		0.00	7.00		Monica	Hourly	24
21	775123							
22	745219	Standard	Note	e: If vo	ou select the	e tria	ngle in the co	orner to

Note: If you select the triangle in the corner to select the whole sheet and double click the divider between any of the columns, Excel will resize to fit the contents.

Punch Entry Details Report

7890124

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Table1

Standard

This report is useful for identifying the status of Punch Entries in your Cost Center, which is particularly useful after the end of the pay period.

It is recommended to pull the punch entries report <u>after the pay period has ended</u> so staff can follow up on different punch entries with one of these status options:

- Approved
- Rejected
- Open

23

- Pending
- Unverified



To access the Punch Entry Details Report:

- 1. Select the Reports tab.
- 2. On the left sidebar, select COA Reports.
- 3. Select Punch Entry Details Report.

Note: This report will show who rejected an entry or entered an entry that went into an Unverified status.

- 4. Enter your search criteria.
 - a. From (MM/DD/YYYY): this should be the start date of the pay period.
 - b. To (MM/DD/YYYY): this should be the end date of the pay period.
 - c. Cost Center: select the XXXX-**EU** version of the Cost Center (for this example we selected 0511-EU as the Cost Center).
 - d. Status: select the status type you are interested in learning more about.
 - e. Other search criteria are optional and dependent on your report needs.

Reports / CoA Reports / Punch Entry Details Report				
CoA Reports - Punch Entry Deta	ils Report			
	-4a	4b		
08/14/2022	08/27/2022		elect Account Type	~
Type Client Name	Type Employee Name	Ту	pe Service Code	4d
0511-EU	× Select Activity	✓ Pe	ending	40
Type Payroll Batch Name	Enter Payroll Batch Id	P	elect Status ending	
Include Canceled and Rejected Punches	Include Only Unbatched Punches	U A B P C	pen nverified pproved atched aid anceled ejected	
Showing 2 out of 2 records		Pi U Ci	rocessed nvalidated ompensated /rite Off	

HOM	E REPORTS 1
DASHBOARD	2 Peports / Dashboard
COA REPORTS	AUTO APPROVAL REPORT
AUTHORIZATION REPORTS	PUNCH ENTRIES REPORT
MANAGEMENT REPORTS	PUNCH ENTRY DETAILS
PAYROLL REPORTS	REPORT



5. Click Search.

6. Download the report (see <u>Canned Reports - How to Search, Filter, and Download</u> for more information).

CoA Rep	oorts - Pu	Inch Entry [Details Rep	oort						
08/14/202	22			08/27/2022			Select Account T	ype		~
Type Clien	nt Name			Type Employee Nan	ne		Type Service Cod	e		
0511-EU			×	Select Activity		~	Pending			~
Type Payro	oll Batch Name			Enter Payroll Batch	ld		Select Entry Type	e		~
□ Include C	Canceled and Reje	cted Punches		Include Only Unba	tched Punches			6	Search	
Showing 2 out	of 2 records								🖈 Download	
Punch ID	Pay We	Reference P	Date of Serv	Account Type	Vehicle Type	General Acti	Employee/Vend	Employee N	Client/ Resi	Cli
2188	34	2125	08/14/2022	Hourly			Shaggy Rogers	ProviderNumb	Scooby Doo	Pri
2126	34		08/15/2022	Hourly			Shaggy Rogers	ProviderNumb	Scooby Doo	Pri

Punch Entry Report Status	Meaning/Action Needed
Approved	The local office needs to run a Payroll Batch for the pay period in question.
Rejected	A staff member, the provider, or the consumer rejected the entry, meaning the entry was not accurate. Providers are not notified if a time entry is rejected by a staff member but are notified if it is done by the consumer.
Open	The provider has clocked in for a shift but has not yet clocked out.
Pending	An entry waiting for auto-approval to run.
Unverified	The punch has been either entered or edited by a staff member and must be verified. Unverified entries require action to move on in the process and be paid. Either another staff member or the provider can verify the entry.

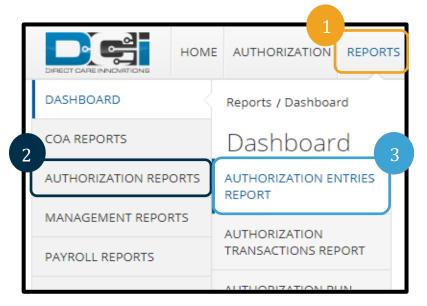


Authorization Entries Report

This report is useful for looking up authorization information. Any user with a Supervisor role in OR PTC DCI can view/access this report. If you do not have the Authorization Admin permission, you can pull this report to see the initial and remaining balance of an authorization. If you have the Authorization Admin permission, you can view authorizations directly. However, you still may find the Authorization Entries Report useful.

To access the Authorization Entries Report in OR PTC DCI:

- 1. Click the Reports tab at the top of your screen.
- 2. On the left sidebar, select Authorization Reports. This will open a secondary menu.
- 3. Click Authorization Entries Report.
- 4. Type in the consumer's name and any other search criteria you may want.
- 5. Check the box next to Include Ended Authorizations.
- 6. Click Search.



Carol Brady	× 4. Funding Source Name	Select Account Type
Type Service Code	Type Cost Center	CutOff Date(MM/DD/YYYY)
Type Region Name		5
Include Future Authorizations	Include Ended Authorizations	Include Discharged Clients Authorization



- 7. You will be taken to your search results. This will display all authorizations for this consumer.
 - a. There is a scroll bar at the bottom of the list that allows you to scroll to the right to see more information about each authorization.
 - b. You can move the columns left and right by clicking on the header and dragging it. This will allow you to organize the information displayed in the order you prefer. You

Authorn Client Name Service Code Cost Center Region Authorization I Authorization I 1400 Carlo Brady Hourly ADL/IA 3311-EU 2021490077 222000 910 Carlo Brady Mileage-11 3311-EU 20219077 222000 909 Carlo Brady Mileage-11 3311-EU 2021987789 222000 833 Carlo Brady Hourly ADL/IA 3311-EU 2021654456 222111 82 Carlo Brady Hieage-10 3311-EU 2021654456 222111	Authonz. Client Name Service Code Cost Center Region Authonzation I Authonzation I 1440 Carlo Brady Mileage-10 3311-EU 2021490077 222000 1449 Carlo Brady Hourly ADL/IA 3311-EU 202199077 222000 2010 Carlo Brady Mileage-11 3311-EU 2021997789 222000 209 Carlo Brady Hourly ADL/IA 3311-EU 2021987789 222000 383 Carlo Brady Mileage-10 3311-EU 2021654456 222111	nowing 6 out	of 6 records					🔀 Download	7
IA49 Carol Brady Hourly ADL/IA 3311-EU 2021490077 22200 1 209 Carol Brady Mileage-11 3311-EU 2021987789 22200 1 209 Carol Brady Hourly ADL/IA 3311-EU 2021987789 22200 1 208 Carol Brady Hourly ADL/IA 3311-EU 2021867456 222111 1 202 Carol Brady Hourly ADL/IA 3311-EU 2021654456 222111 1 202 Carol Brady Hourly ADL/IA 3311-EU 2021654456 222111 1	1449 Carol Brady Hourly ADL/IA 3311-EU 2021490077 22000 100 Carol Brady Mileage-11 3311-EU 2021987789 22000 109 Carol Brady Hourly ADL/IA 3311-EU 2021987789 22000 108 Carol Brady Hourly ADL/IA 3311-EU 2021987789 22000 108 Carol Brady Mileage-10 3311-EU 2021654456 22111 1082 Carol Brady Hourly ADL/IA 3311-EU 2021654456 22111	Authori	Client Name	Service Code	Cost Center	Region	Authorization I	Authorization I	`
0 Carol Brady Mileage-11 3311-EU 2021987789 22200 1 009 Carol Brady Hourly ADL/IA 3311-EU 2021987789 22200 1 038 Carol Brady Mileage-10 3311-EU 2021654456 22111 1 0382 Carol Brady Hourly ADL/IA 3311-EU 2021654456 222111 1	0 Carol Brady Mileage-11 3311-EU 2021987789 22200 10 009 Carol Brady Hourly ADL/IA 3311-EU 2021987789 22200 10 033 Carol Brady Mileage-10 3311-EU 2021654456 222111 10 0362 Carol Brady Hourly ADL/IA 3311-EU 2021654456 222111 10 0362 Carol Brady Hourly ADL/IA 3311-EU 2021654456 222111 10	1400	Сагог втацу	wileage-10	3311-EU		2021490077	222000	
209 Carol Brady Hourly ADL/IA 3311-EU 2021987789 22200 383 Carol Brady Mileage-10 3311-EU 2021654456 222111 382 Carol Brady Hourly ADL/IA 3311-EU 2021654456 222111	209 Carol Brady Hourly ADL/IA 3311-EU 2021987789 22200 383 Carol Brady Mileage-10 3311-EU 2021654456 222111 382 Carol Brady Hourly ADL/IA 3311-EU 2021654456 222111	1449	Carol Brady	Hourly ADL/IA	3311-EU		2021490077	222000	
383 Carol Brady Mileage-10 3311-EU 2021654456 222111 382 Carol Brady Hourly ADL/IA 3311-EU 2021654456 222111	383 Carol Brady Mileage-10 3311-EU 2021654456 222111 382 Carol Brady Hourly ADL/IA 3311-EU 2021654456 222111	910	Carol Brady	Mileage-11	3311-EU		2021987789	222000	
182 Carol Brady Hourly ADL/IA 3311-EU 2021654456 222111	182 Carol Brady Hourly ADL/IA 3311-EU 2021654456 222111	09	Carol Brady	Hourly ADL/IA	3311-EU		2021987789	222000	
		83	Carol Brady	Mileage-10	3311-EU		2021654456	222111	
	7a	382	Carol Brady	Hourly ADL/IA	3311-EU		2021654456	222111	
	7a								

can also change the width of columns by hovering to the right of the column and dragging to the right.

- c. Key columns you will want to look at to identify authorizations are Authorization ID Reference, Authorization ID Reference 1, Start Date, and End Date.
 - Authorization ID Reference shows the voucher number associated with the authorization.
 - Authorization ID Reference 1 displays the provider number.
 - **Start** and **End Date** refer to the start and end date of the authorization. Unless the provider only worked part of the pay period, these dates will correspond with the pay period the authorization is associated with.

Showing 8 out of 8 re	ecords					
Client Name	Service Code	Cost Cente 70	Authorization I	Authorization I	Start Date	End Date
Carol Brady	Mileage-10	3311-EU	2021321321	222000	10/24/2021	11/06/2021
Carol Brady	Hourly ADL/IADL-10	3311-EU	2021321321	222000	10/24/2021	11/06/2021
Carol Brady	Mileage-10	3311-EU	2021490077	222000	09/12/2021	09/25/2021
Carol Brady	Hourly ADL/IADL-10	3311-EU	2021490077	222000	09/12/2021	09/25/2021

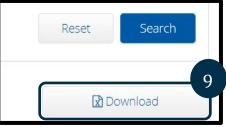


- 8. If you scroll to the right, you will see columns labeled Initial Balance, Holds, and Available.
 - a. The **Initial Balance** column shows the number of hours or miles the provider is authorized to work for this consumer for the dates specified for this authorization.
 - b. The **Holds** column shows how many hours or miles are in a pending status for this authorization.
 - c. The **Available** column displays how many hours or miles the provider can still claim against this authorization. This considers all pending entries. If this column shows 0, the provider has claimed all their authorized hours or miles.

Showing at of 8 rea	cords	8b	8c		_		
Initial Balance	Remaining Balance	Holds	Available	Billing Rate	Monthly Max	Weekly Max	Daily
50.00	50	0.00	50	0	50	50	50
30.00	30	0.00	30	0	30	30	30
8.00	8	0.00	8	0	8	8	8

You can download this report if you would like to view it in Excel, PDF, or Google Sheets. For the following steps, we will download to Excel, but the steps are the same for the other formats.

- 9. Click Download.
- 10. The Download Report Wizard will appear.

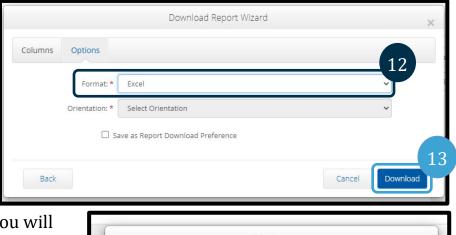


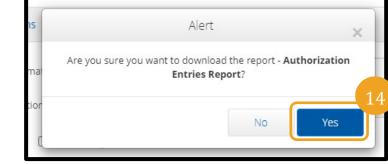
- a. Click the columns on the left you wish to include in your downloaded version.
- b. Following each selection from the left column, click the right-facing arrow to add the column you clicked to the Selected Columns list.
- c. The Selected Columns list will display all columns that will download in your report. If it is not included in the Selected Columns, it will not appear on your downloaded report. Once you download the report, the columns will display in the order they are listed in the Selected Columns. This means the top column header in Selected Columns will be the left column on the downloaded report. You can change this order by dragging items in the Selected Columns up or down.
- 11. Click Next.



Download Report Wizard 🛛 🗙	Download Report Wizard 🛛 🗙
Columns Options Search Column See 10a Available Columns Undo Selected Columns Undo Selected Columns Undo Selected Columns Undo Cost Center Region Redo Authorization ID Reference	Columns Options Search Column Search Available Columns 10 c Authorization ID Reference 5 Undo Eligibility Code Image: Column Search Daily Rate Image: Column Search Billing Hold Kedo Status Tuber Search
Cancel Next	Canto

- 12. Select your desired report format from the dropdown menu next to Format.
- 13. Click Download.
- 14. Select Yes.
- 15. Open the download. It may appear in the bottom left corner or top right depending on your web browser settings.
- 16. Once you click to open the file, you will want to format it so it is easier to read.
- 17. To widen the columns, click the green arrow in the left corner of the spreadsheet. Then with your cursor, hover between any two columns and double click.





		A		В	С	D	E	F
1	17	nt Na	ir S	ervice Co	Authoriza	Authoriza	Start Date	End Date
2	Caro	l Bra	d١	/ileage-1	202149007	222000	09/12/202	09/25/2021
3	Caro	l Bra	d٢	lourly AD	202149007	222000	09/12/202	09/25/2021
4	Caro	l Bra	d١	/ileage-1	202198778	222000	08/15/202	08/28/2021
5	Caro	l Bra	d٢	lourly AD	202198778	222000	08/15/202	08/28/2021

OR PTC

Notes Report

When time allows, please pull this report to view comments left by providers on their entries. To run a notes report, follow these steps after logging into OR PTC DCI:

- 1. Click Reports.
- 2. Click Notes Report.
- 3. Click on Punch Entry Notes and Canned Statements Report.

	HOME AUT	HORIZATION	REPORTS	1
COA REPORTS	3 <u>Da</u>	shhoar	d	
AUTHORIZATION REPO	RTS AND	CH ENTRY NOT CANNED EMENTS REPO		
MANAGEMENT REPOR				
PAYROLL REPORTS		OYEE SERVICE OUNT PUNCH N RT		
BILLING REPORTS	CLIEN	IT FUNDING		
PROFILE REPORTS		UNT PUNCH N	NOTES	
FUNDING ACCOUNT REPORTS	PAYR REPO	OLL ENTRY NC RT	DTES	
SETTINGS REPORTS	PILLI	NG ENTRY NOT	rec	
EVV REPORTS	REPO			
TRAINING REPORTS		OYEE PROFILE		
AUDITING SYSTEM ACTIVITY REPORTS	CLIEN REPO	IT PROFILE NO RT	TES	
BUSINESS RULES REPO	RTS AUTH REPO	IORIZATION N	OTES	
CUSTOM FIELDS				
NOTES REPORT	- 2 ANN REPO	IED STATEMEN RT	ITS	



- 4. Use the search fields to enter any search criteria you wish to filter your report by. In this example, we entered a date range. Also note, there are options listed below the search criteria, such as Include Canceled and Rejected Punches, that you may wish to use.
- 5. Click Search.

Reports / Notes	Reports / Punch Entry	/ Notes and Canned S	tatement Repo	rt					
Punch Er	ntry Notes a	and Canned	l Statem	nent Report					
	5								4
07/01/2021				12/31/2021			Select Account Type		~
Type Client	Name			Type Employee Name			Type Service Code		
0511-EU			×	Select Activity		~	Select Status		~
Select Entry	/ Туре		~						
Include Ca	nceled and Rejected P	Punches							5
								Reset	O Search
								Keset	
Showing 177 out	of 177 records							L	Download
Punch ID	Date of Serv	Account Type	Employee/V	Employee N	Client/ Resident	Cost Center	Service Code	Start Date	End Date
1952	08/05/2021	Hourly	King Horsen	nan 555048989	Humpty Dumpty	0511-EU	Hourly ADL/IA	08/05/2021 12	08/05/2021 02 ^
1947	08/20/2021	Hourly	Shaggy Rog	ProviderNumb	. Scooby Doo	0511-EU	Hourly ADL/IA	08/20/2021 09	08/20/2021 12
1574	10/28/2021	Hourly	A1 Providers	s 111111	A1 Consumers	0511-EU	Hourly ADL/IA	10/28/2021 09	10/28/2021 10
1572	10/20/2021	Hourly	A1 Drovidor	111111	A1 Concurrent	0511 EU		10/20/2021 12	10/20/2021 11

 Your report will be displayed. If you wish to format this or download the report and format in Excel, follow the steps to download a report in <u>Canned Reports - How to Search</u> <u>and Download</u> beginning at step 4.

For an example of the Notes Report, see <u>Canned Report Example</u>.

Custom Reports

Acumen has also developed custom reports for the Agency upon request. A custom report can be sent once or on a recurring schedule. Custom reports are delivered to the recipient through the OR PTC DCI Messaging Module. The Agency has two custom reports:

1. Notifications Report (sent upon request)

• This report provides a list of all system generated notifications, using DCI Message Templates, sent to a specific user (consumer, provider, or consumer-employer representative (CER)) within a given timeframe. This includes the message and date and time it was sent.



2. Changed Email/Phone Number Report (sent once per month)

• This report includes a list of external users (consumers, providers, and CERs) whose email address or phone number was changed in the prior month under a specific cost center.

Notifications Report

State Users can request this report for a specific provider by submitting an email request to OHCC Customer Relations, <u>OHCC.CustomerRelations@odhsoha.oregon.gov</u>.

The request needs to include:

- Requestor name and OR# or P#.
- Explanation of why the report is being requested.
- The date range of notifications being requested (start date and end date).
- Either the Uni ID or the Provider Number of the provider who received the notifications.
- The name of the Message Template(s) included in the request. Or the requestor may simply state "All."
- Program Name(s): Requestor should state APD, AMH Behavioral Health, or both.

Here is an example of what the Notifications Report will look like. This will be sent to the Agency upon request.

Start Date:	1/25/2021												
End Date:	1/31/2021												
Uni ID:	UI5555555												
Provider Number:	Must provide UNI ID or Provider Number												
Message Template Name:	Password Reset, Password Changed												
Program Name(s):	Must state which program or programs (i.e. APD)												
Provider Name:	Provider Five												
Program Name	Service Code	Service Name	Consumer Name	Consumer Prime	Provider Number	Message Template Name	Date Sent	Time Sent	Email	Text	Message	Message Opened	Opened Da
					456123,555555	Password Changed	2021-01-26	7:06:35 PM	Yes	Yes	Yes	No	
					456123,555555	Password Reset	2021-01-26	7:15:42 PM	Yes	No	Yes	No	
					456123,555555	Password Changed	2021-01-28	1:17:37 AM	Yes	Yes	Yes	No	



Changed Email/Phone Report

Here is an example of the Changed Email/Phone Number Report. This will be sent to those identified by each office each month. State Users will utilize this report to identify when a provider, consumer, or CER has updated their email or phone number. They will then take appropriate actions specified in business processes <u>1.2.3 Manage Provider Accounts – Update Provider Information</u>, <u>1.3.2 Update Consumer Information</u>, and <u>1.4.2 Update Consumer Employer Representative Information</u>.

			5		
Month:	Feb-21				
Branch:	3412 - EU				
User Name	Profile Type	Prime/UniID	Provider Numb	er Old Email Address	New Email Addres
Test Provider	Employee	123456	456789		
Provider Ten	Employee	UI0000000	123456		
Provider Six	Employee	UI6666666	555555,666666		
Provider Four	Employee	UI444444	444444,OR121	2122	
Consumer Three	Client	AZ222222			
Test Guardian	Guardian				
Changed Date	Changed 1	Time Change	d By Name	Changed By Employee Number	
Changed Date March 18, 20		Time Change 29 PM Case M		Changed By Employee Number 123456	<u>r</u>
¥	3:09:2		anager		

Appendix A: Full List of Canned Reports

- COA Reports
 - o Auto Approval Report
 - o Punch Entries Report
 - o Punch Entry Details Report
 - o Service Accounts Report
 - Residential Attendance Report
 - o Residential Absentee Report
 - o Parenting Attendance Report
 - o Parenting Absentee Report
 - Day Attendance Report
 - Group Service Attendance Report
 - Mileage Entries Details Report
 - Low Accuracy Device Report



- $\circ \ \ \mbox{Void Pre-Action Report}$
- Time Card Report
- Reason Code Report
- Authorization Reports
 - Authorization Entries Report
 - Authorization Transactions Report
 - Authorization Run Rate Report
 - Expiring Authorization Report
- Management Reports
 - Punch Entry Overtime Report
 - Punch Entry Authorization Violation Report
 - Late Punch Entry Report
 - o Client Approval Bypassed Punch Entry Report
 - o Late Punch Entry Approval Report
 - o Pay Week Hours Report
 - Pay Week Total Hours Report
 - o Unbillable Entries Report
 - Compensating Entries Report
 - o Total Daily Hours Report
 - Voided Entries Report
 - o Employee Pay Rates Report
- Payroll Reports
 - Payroll Batch Details Report
 - Total Hours by Month Report
 - Check Details Report
- Billing Reports
 - o Billing Batch Details Report
 - o Billing Register Report
 - o Residential Billing Absentee Report
 - o Parenting Billing Absentee Report
 - o Billing Entry Authorization Max Violation Report
 - o Rollups Report
 - Rollups Detail Report
 - o Payback Rebill Report
 - o Billing Batch Payroll Results Report
 - o Write-Off Detail Report
 - Billing Batch EDI Details Report
 - o Billing Batch Reason Code Report

- Profile Reports
 - Employees Report
 - Roles Report
 - Clients Report
 - Residential Programs Report
 - o Day Programs
 - Parenting Programs Report
 - Group Services Report
 - o Guardians Report
 - o Case Workers Report
 - Vendors Report
- Funding Account Reports
 - Funding Accounts Report
- Settings Reports
 - o Cost Center Report
 - Funding Sources Report
 - Service Codes Report
 - Service Code Groups Report
 - o Regions Report
- EVV Reports
 - o EVV Entries Report
 - Geofence Report
 - EVV Phone Report
 - o FOB Report
 - o Portal Sign Off Report
- Care Management Reports
 - Pending Care Notes Report
 - o Task Result Details Report
 - o Raw Data Dump Report
 - o Client Diagnosis Report
 - o Diagnosis Code Usage Report
- Scheduling Reports
 - Employee Schedule Report
 - Client Schedule Report
 - o Day Program Schedule Report
 - Residential Program Schedule Report
 - Group Service Schedule Report





- Missed Shift Report
- Training Reports
 - Employee Training Certification Report
 - o Employee Training Certification Details Report
 - o Service Code Certification Requirements Report
 - Service Code Certification Templates Report
 - Certification Templates Report
 - o Certification Templates Association Report
 - o Certification Requirements Report
 - o Certification Requirements Associations Report
 - Expiring Training Certification Report
 - Employee Required Trainings Report
 - Employee Certification Requirements Linkage Report
- Auditing System Activity Reports
 - o Login Report
 - Profile Event Report
- Business Rules Reports
 - o Business Rules Settings Report
 - o Business Rules Result Report
- Summary Report
 - Summary Report
- Custom Fields Reports
 - Custom Field Definitions Report
 - o Custom Field Values Report
- Notes Reports
 - Punch Entry Notes and Canned Statements Report
 - o Employee Service Account Punch Notes Report
 - o Client Funding Account Punch Notes Report
 - o Payroll Entry Notes Report
 - o Billing Entry Notes Report
 - Employee Profile Notes Report
 - Client Profile Notes Report
 - o Authorization Notes Report
 - Canned Statements Report