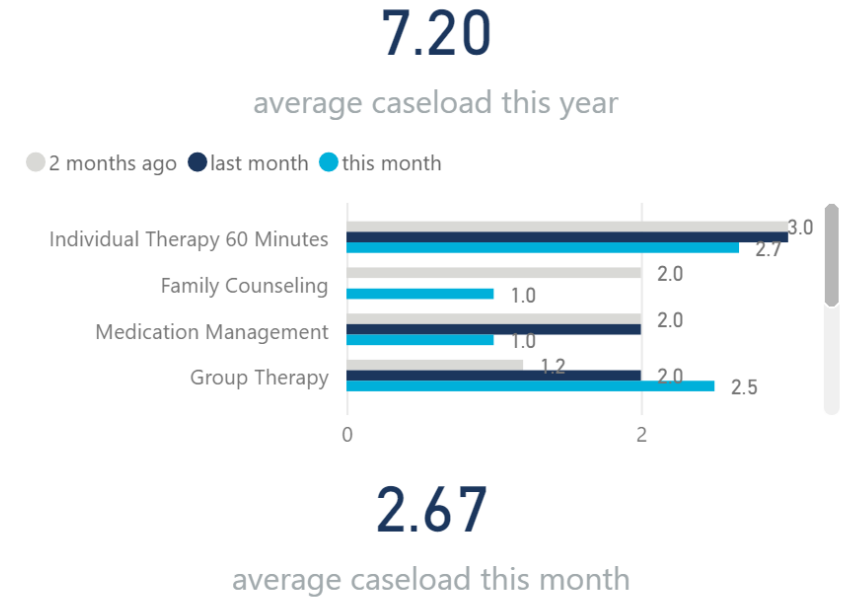
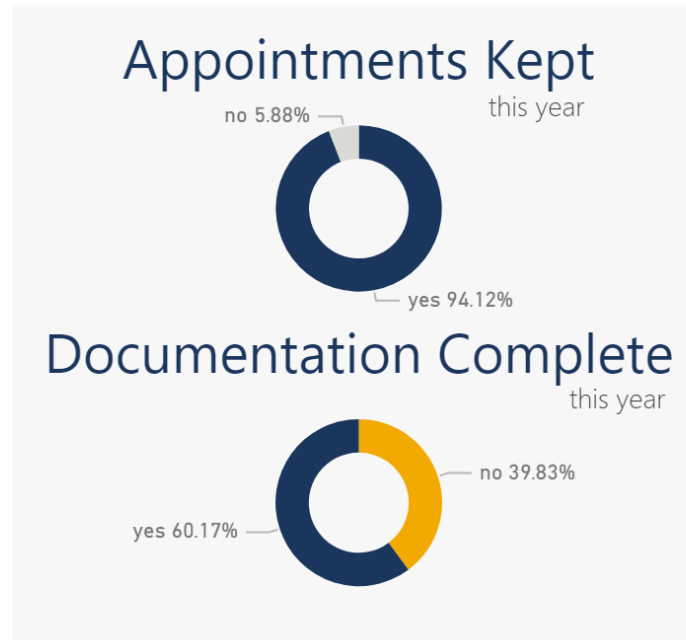
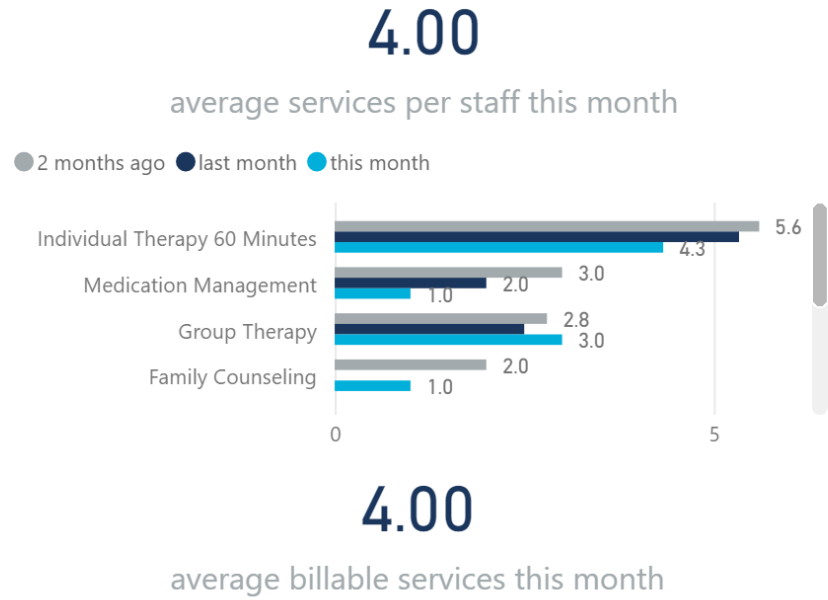
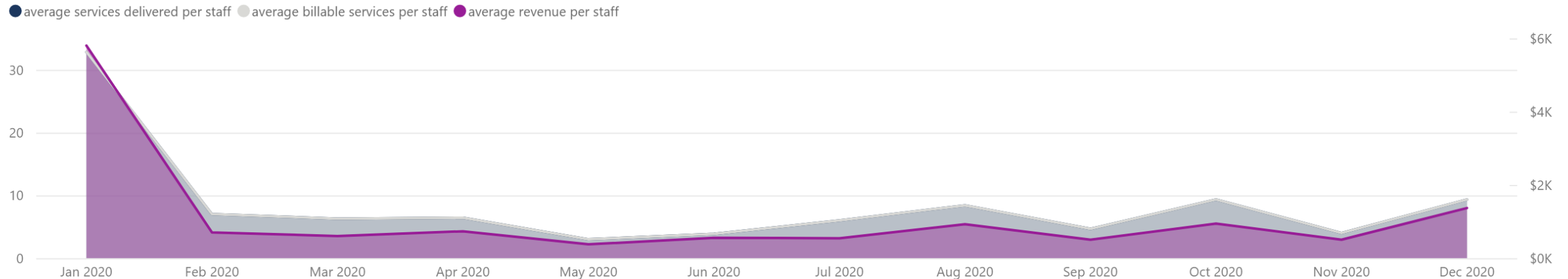


Are we effectively assigning, scheduling and engaging clients?



Average Services per Staff by Month



Appointment Status for Scheduled Services

2157

services scheduled

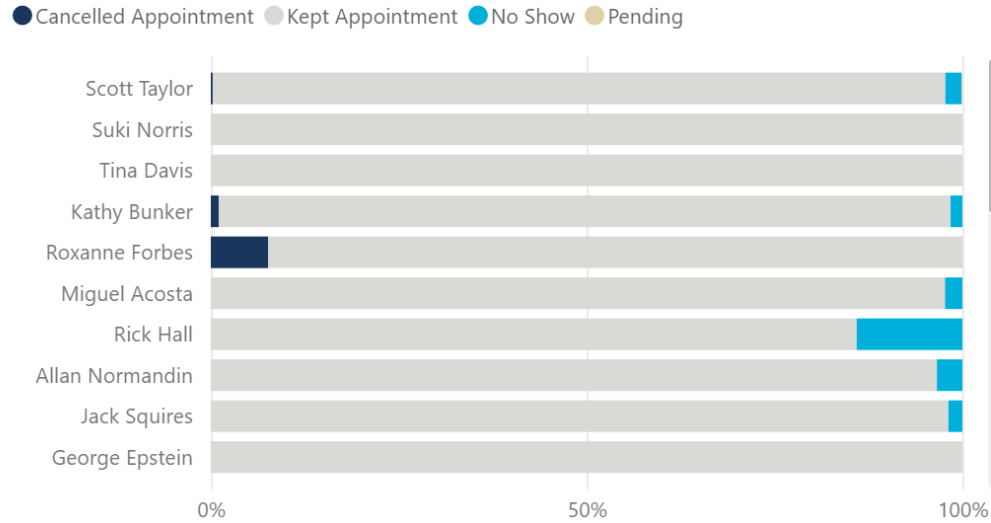
1/1/2019

2/18/2022

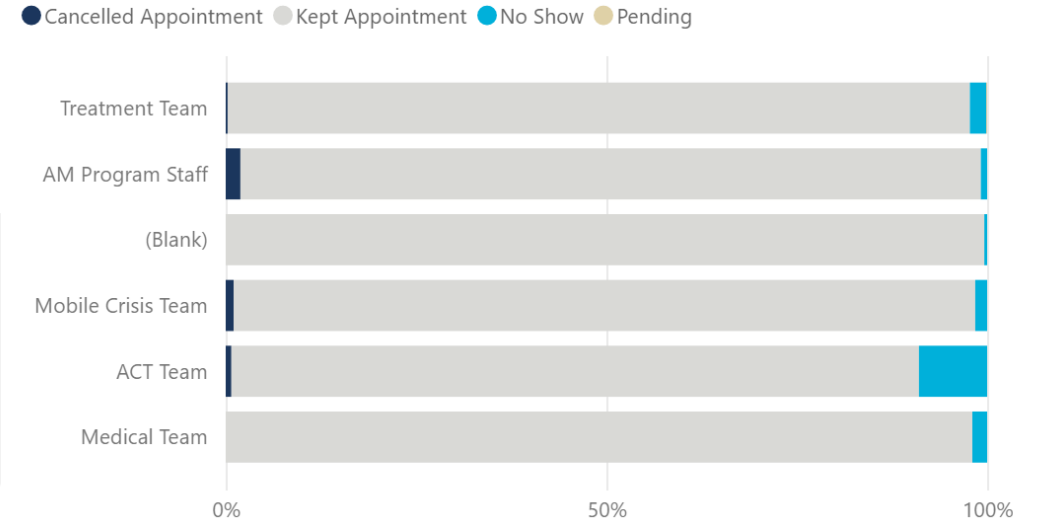


Programs
 All ▾
Locations
 All ▾
Services
 All ▾
Activities
 All ▾
Payer Categories
 All ▾
Payers
 All ▾
Billable Service
 All ▾
Staff
 All ▾
Staff Status
 All ▾
Staff Role
 All ▾
 +

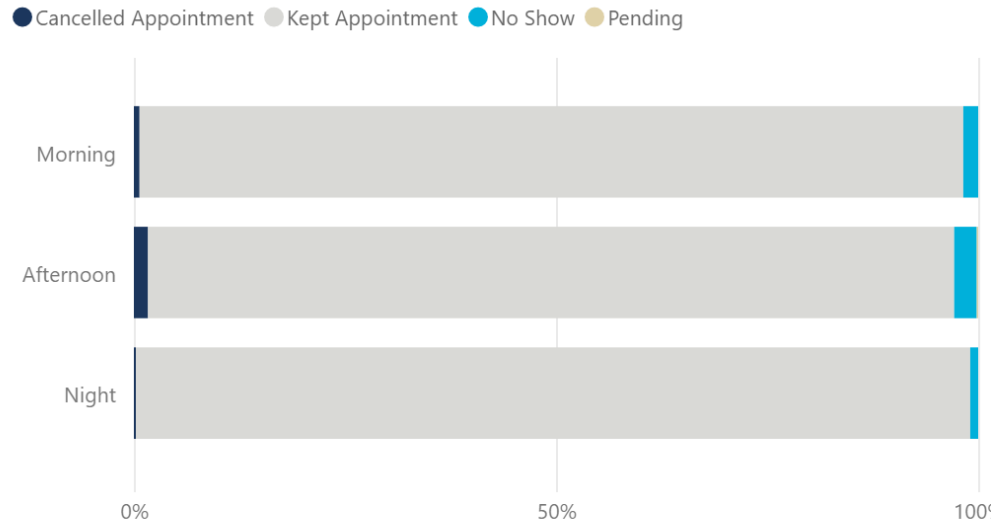
Appointment Status by Staff



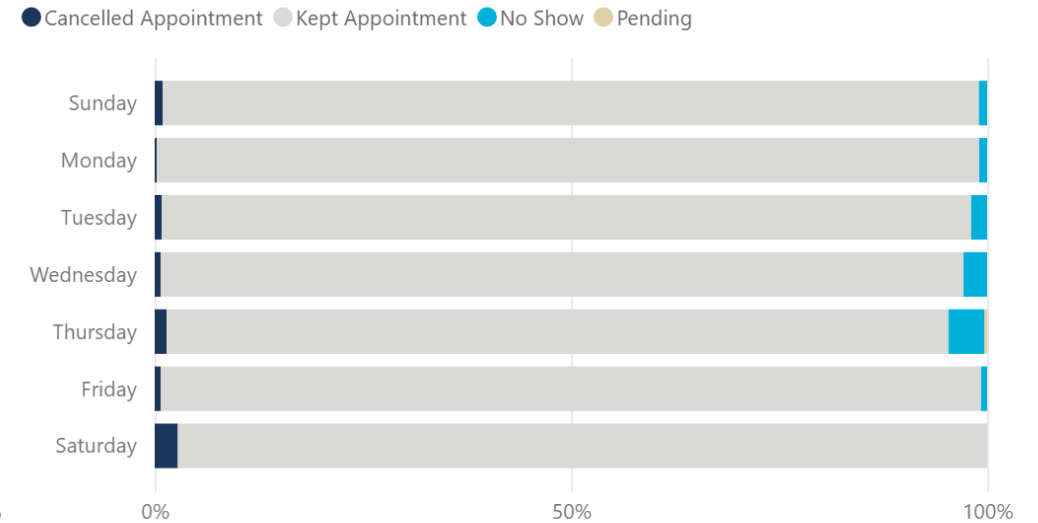
Appointment Status by Team



Time of Day



Day of Week



Services Delivered

Programs
All

Locations
All

Services
All

Activities
All

Payer Categories
All

Payers
All

Billable Service
All

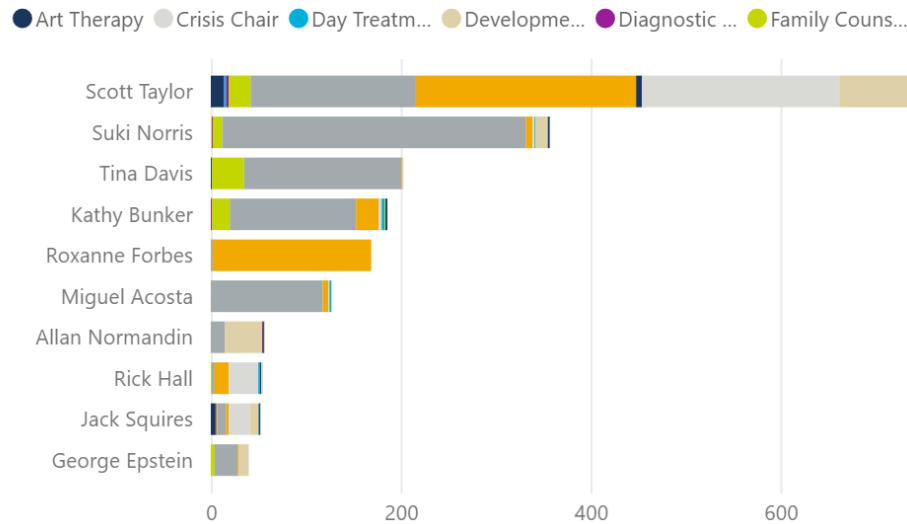
Staff
All

Staff Status
All

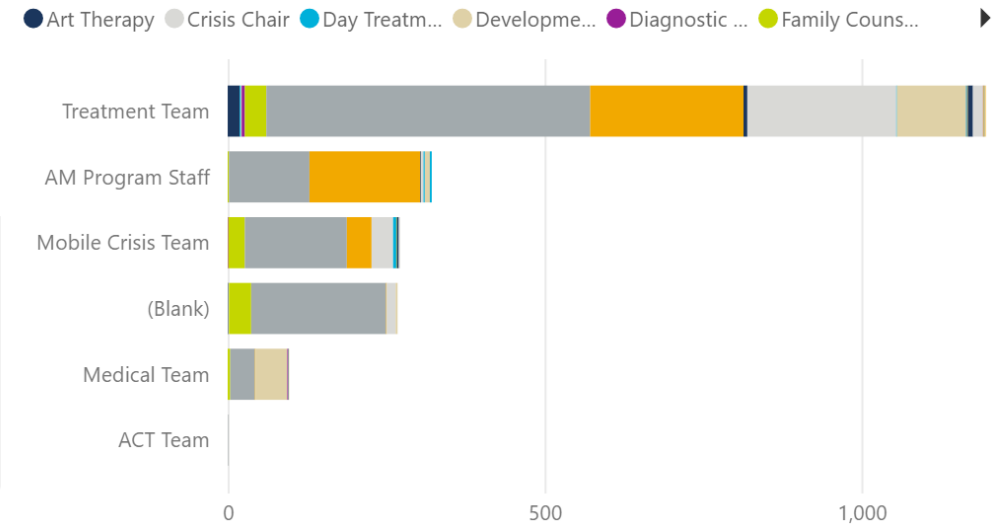
Staff Role
All

+

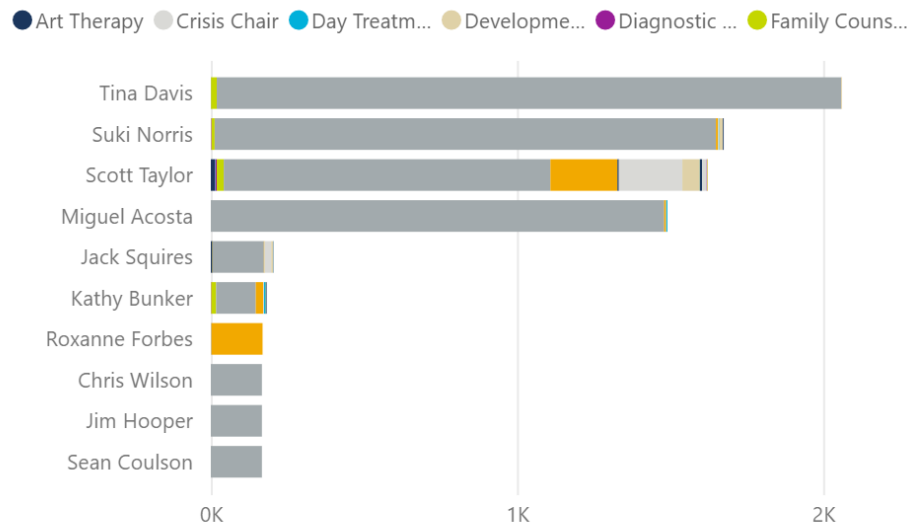
Services Delivered by Staff



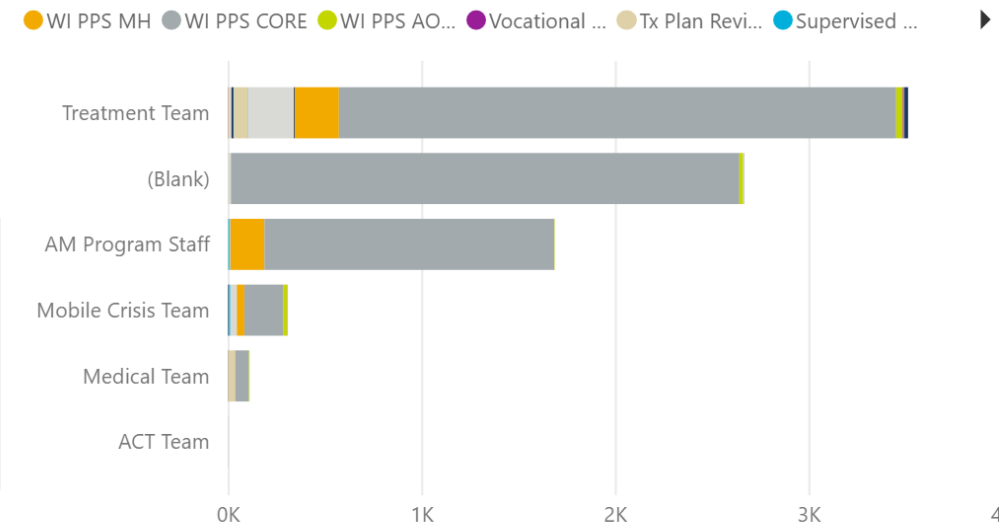
Services Delivered by Team



Service Duration by Staff



Service Duration by Team



Services Delivered

Programs

Locations

Services

Activities

Payer Categories

Payers

Billable Service

Staff

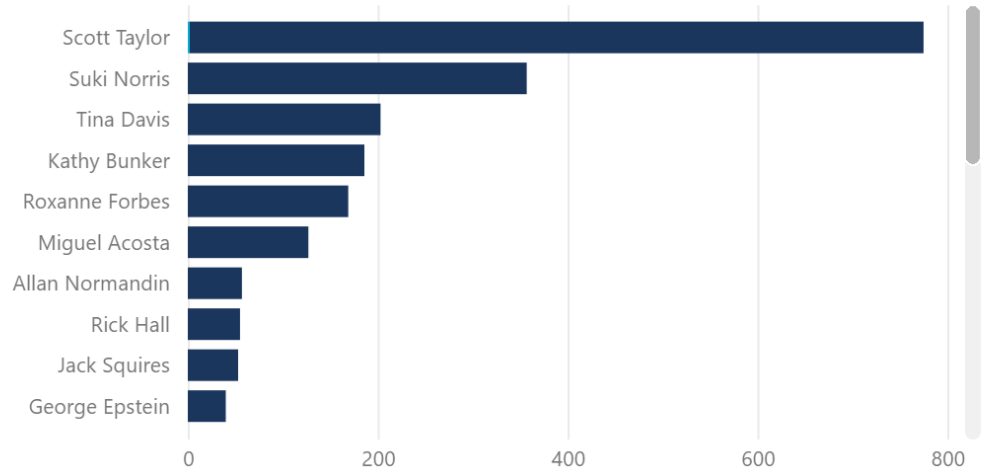
Staff Status

Staff Role

+

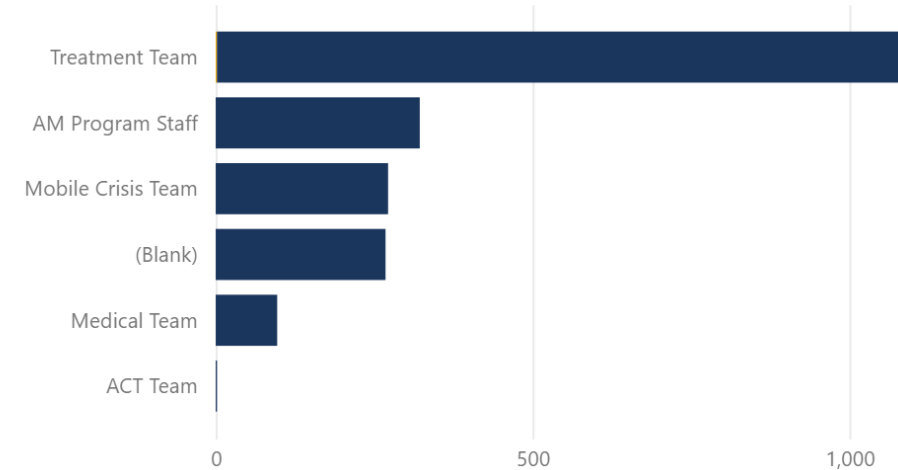
Billable Services by Staff

● No ● Yes



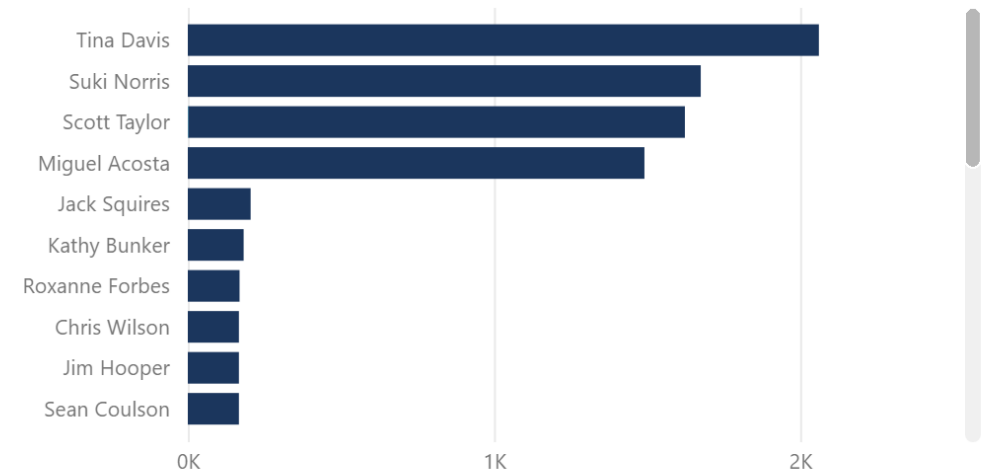
Billable Services by Team

● No ● Yes



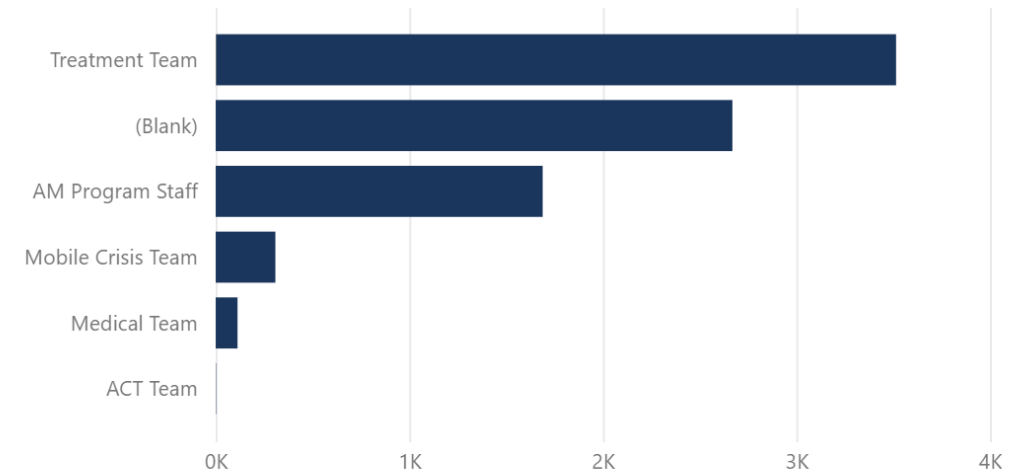
Duration of Billable Services by Staff

● No ● Yes



Duration of Billable Services by Team

● No ● Yes



Charges

Programs
 All

Locations
 All

Services
 All

Activities
 All

Payer Categories
 All

Payers
 All

Billable Service
 All

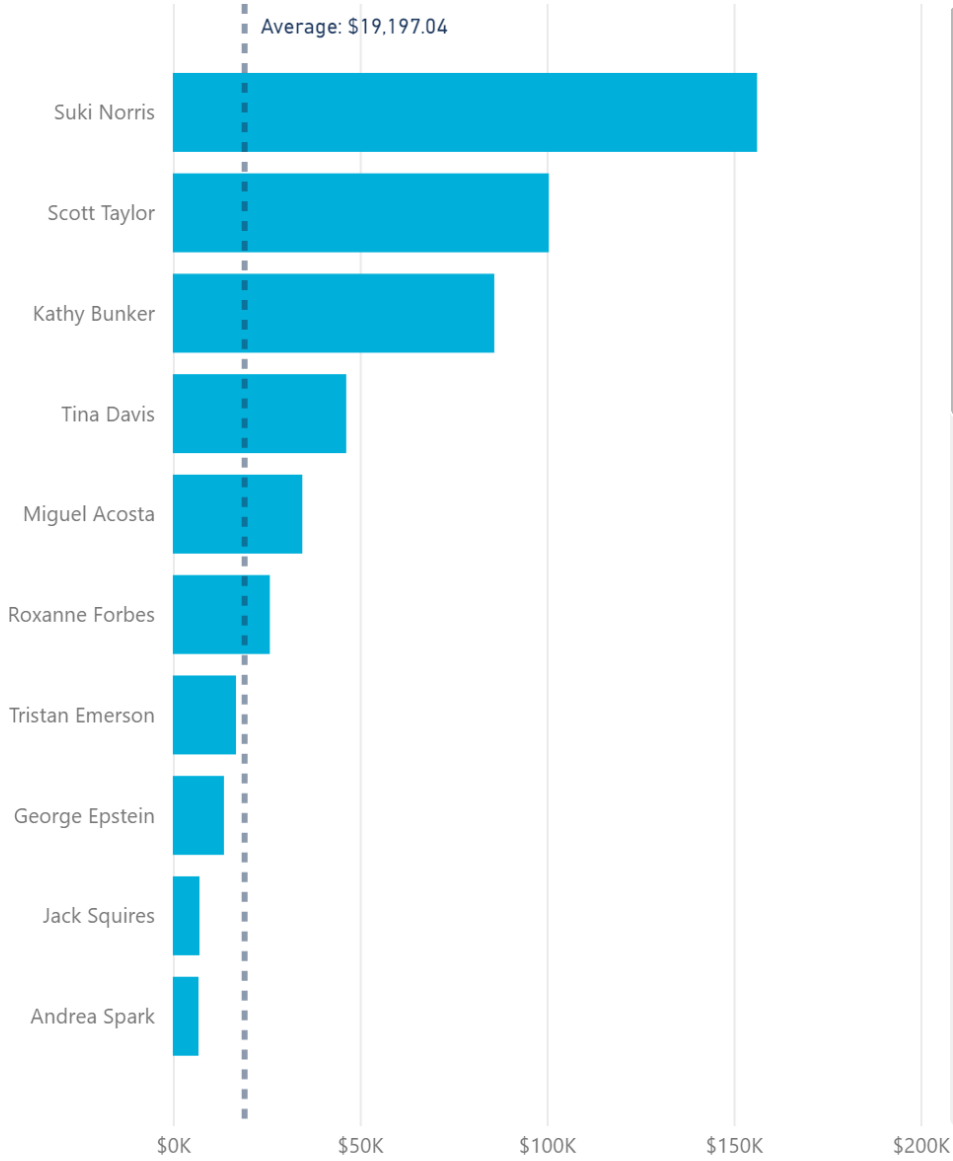
Staff
 All

Staff Status
 All

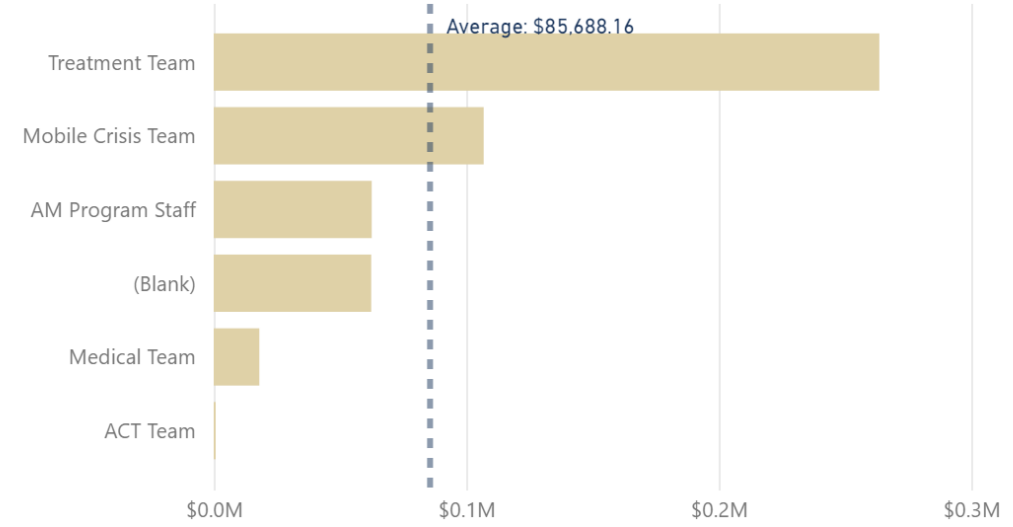
Staff Role
 All

+

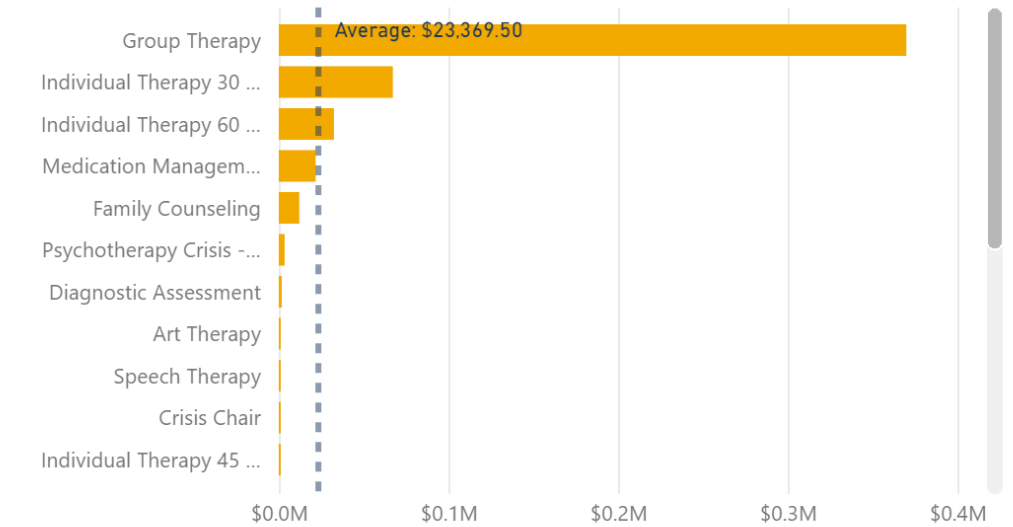
Charges by Staff



Charges by Team



Charges by Service



Caseload

Programs
All

Locations
All

Services
All

Activities
All

Payer Categories
All

Payers
All

Billable Service
All

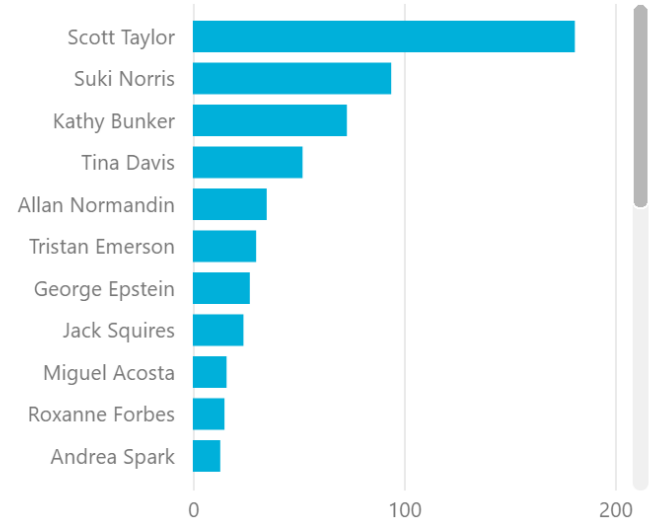
Staff
All

Staff Status
All

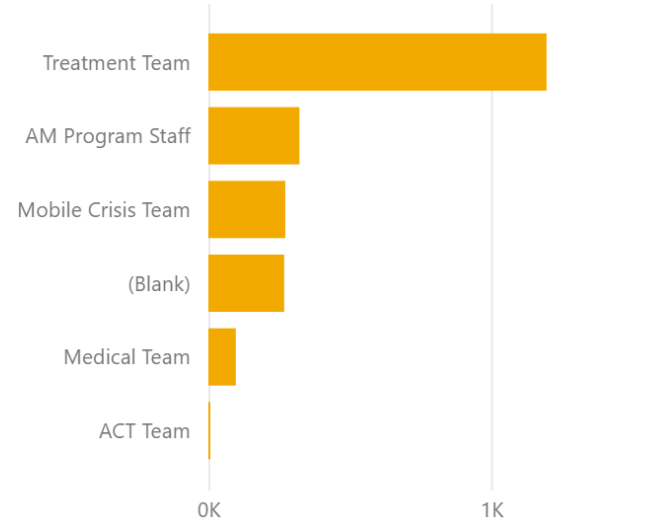
Staff Role
All

+

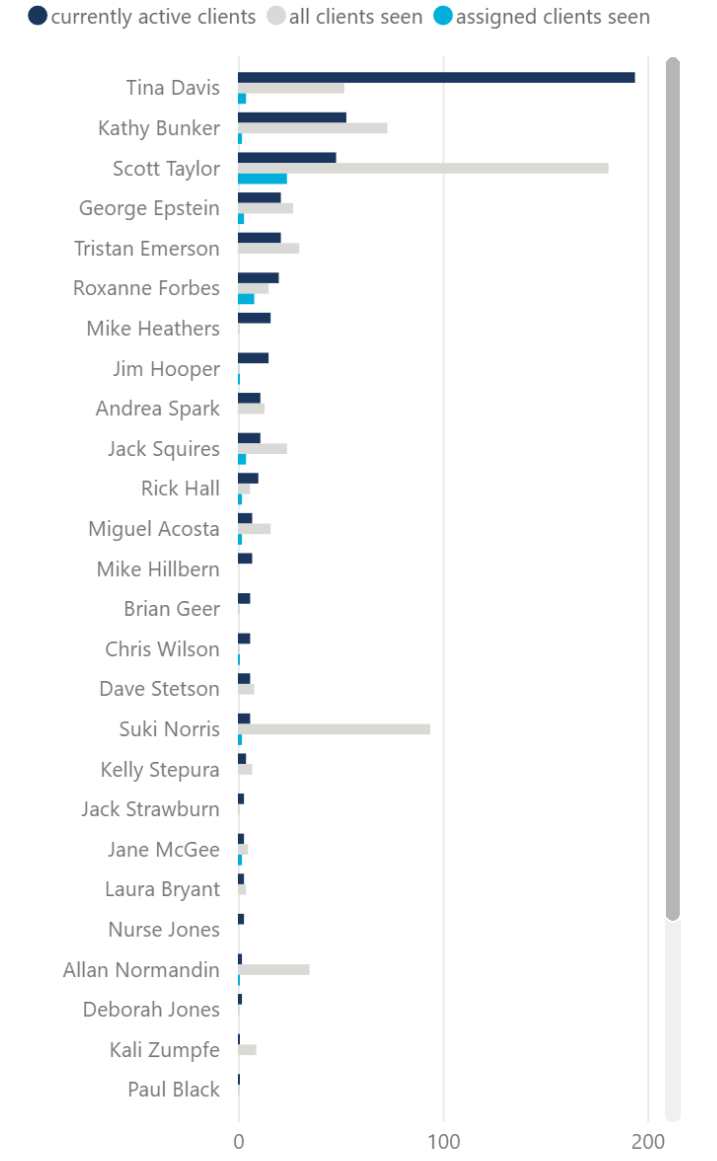
Clients Seen by Staff



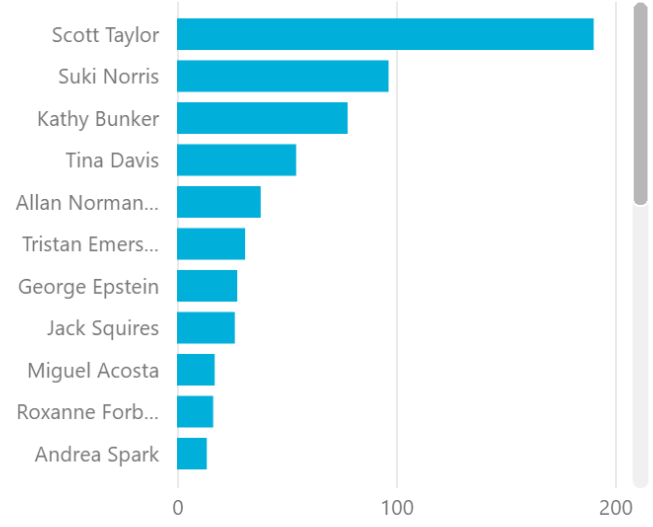
Clients Seen by Team



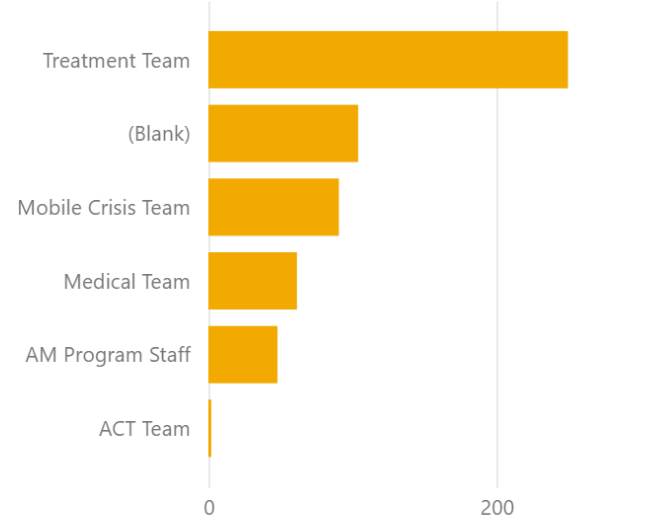
Currently Active Clients



Intensity by Staff



Intensity by Team



Services per Client

Programs
All

Locations
All

Services
All

Activities
All

Payer Categories
All

Payers
All

Billable Service
All

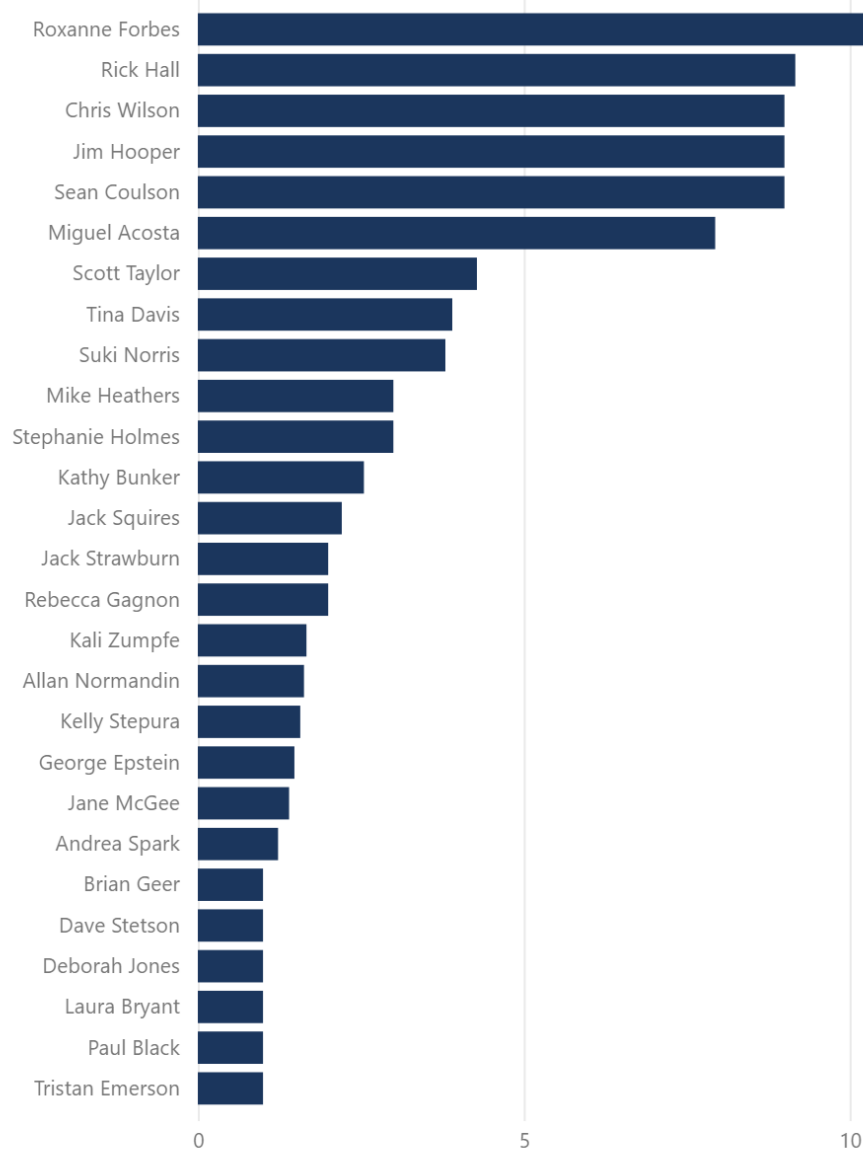
Staff
All

Staff Status
All

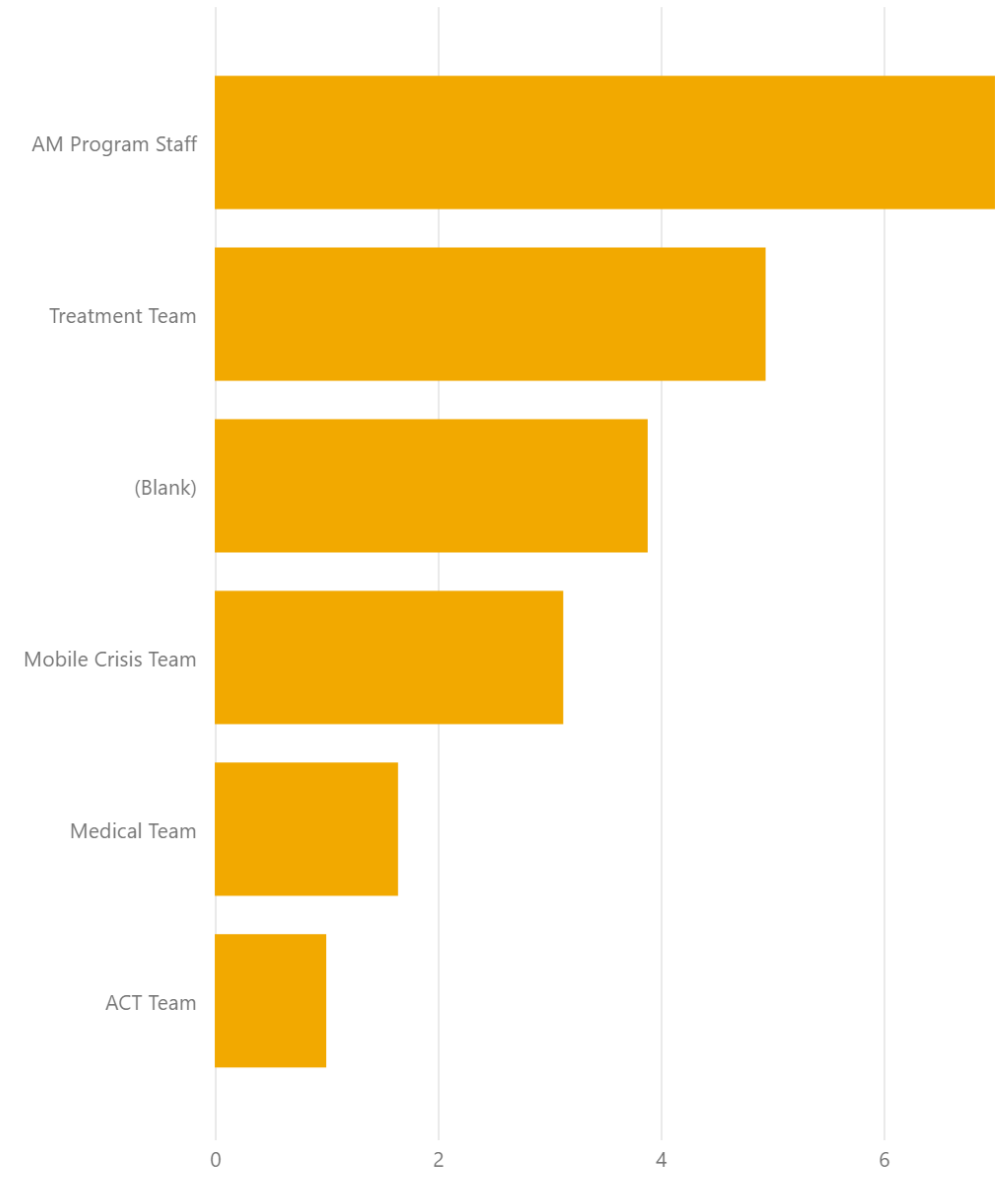
Staff Role
All

+

Average Services per Client by Staff



Average Services per Client by Team

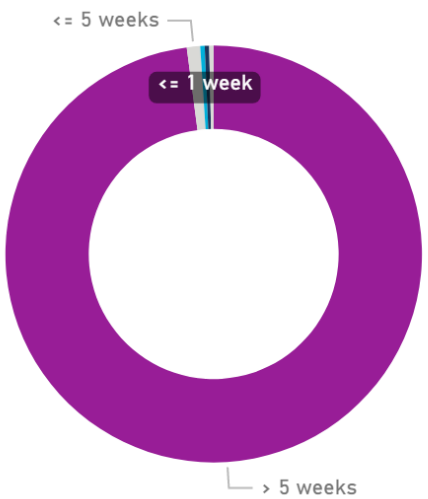


Days Since Last Service

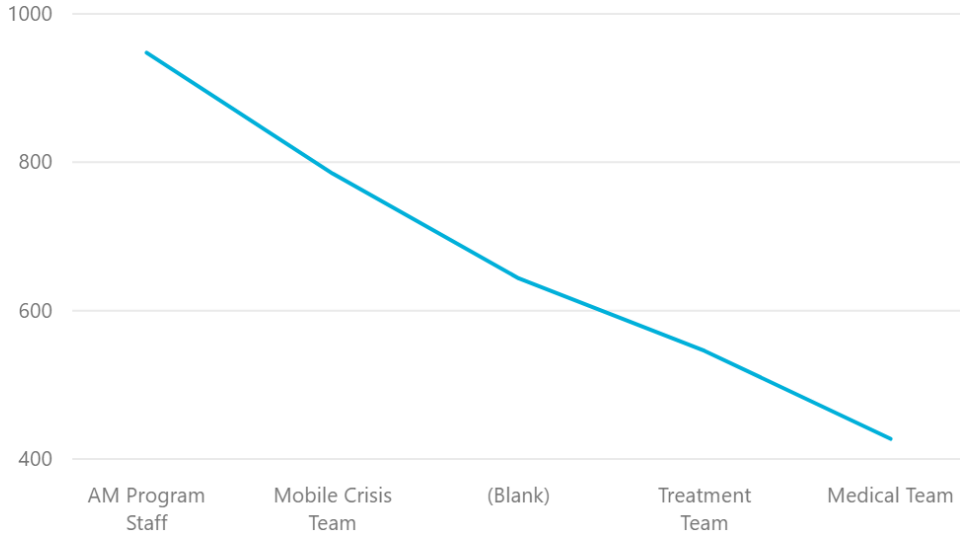
(for currently active clients with no scheduled appointments)

- Programs: All
- Locations: All
- Services: All
- Activities: All
- Payer Categories: All
- Payers: All
- Billable Service: All
- Staff: All
- Staff Status: All
- Staff Role: All

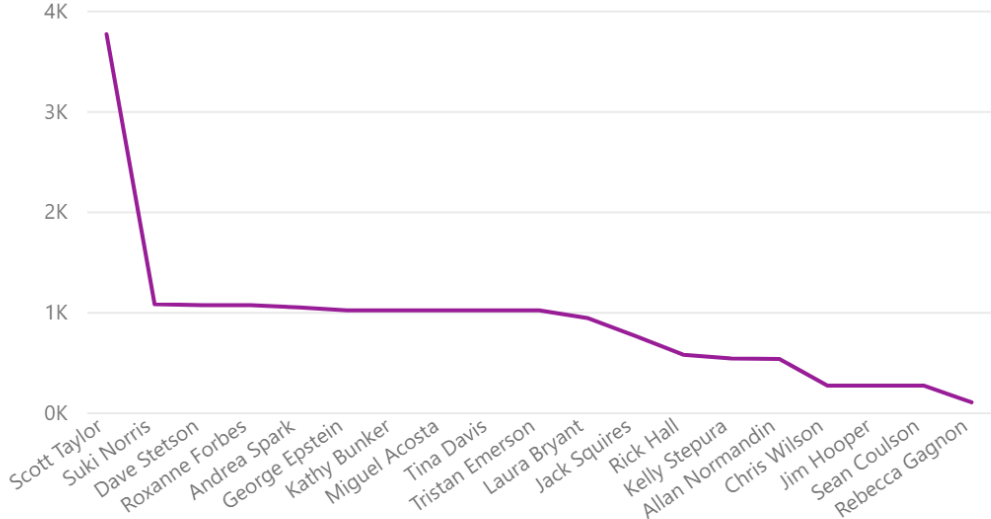
Days Since Last Service



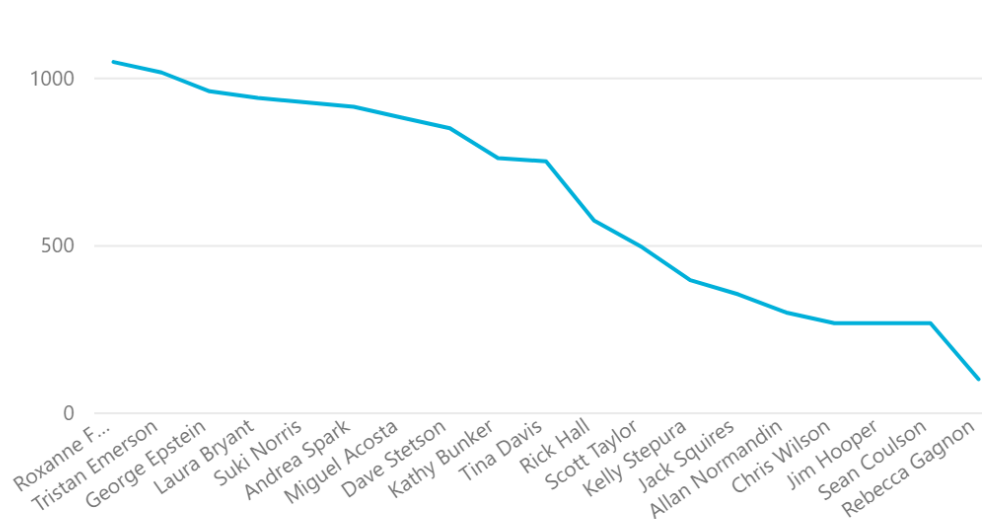
Average Days Since Last Service by Team



Maximum Days Since Last Service by Staff



Average Days Since Last Service by Staff



Documentation

Programs
All

Locations
All

Services
All

Activities
All

Payer Categories
All

Payers
All

Billable Service
All

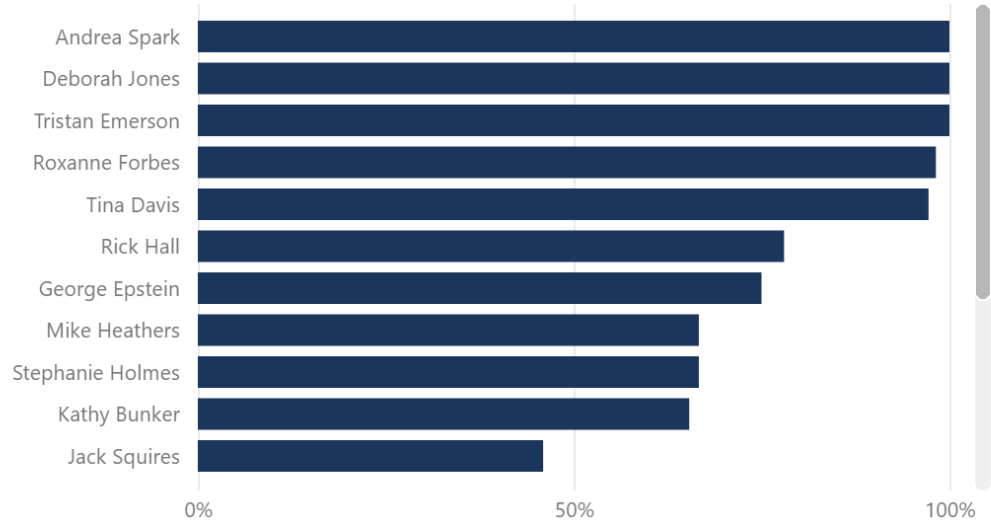
Staff
All

Staff Status
All

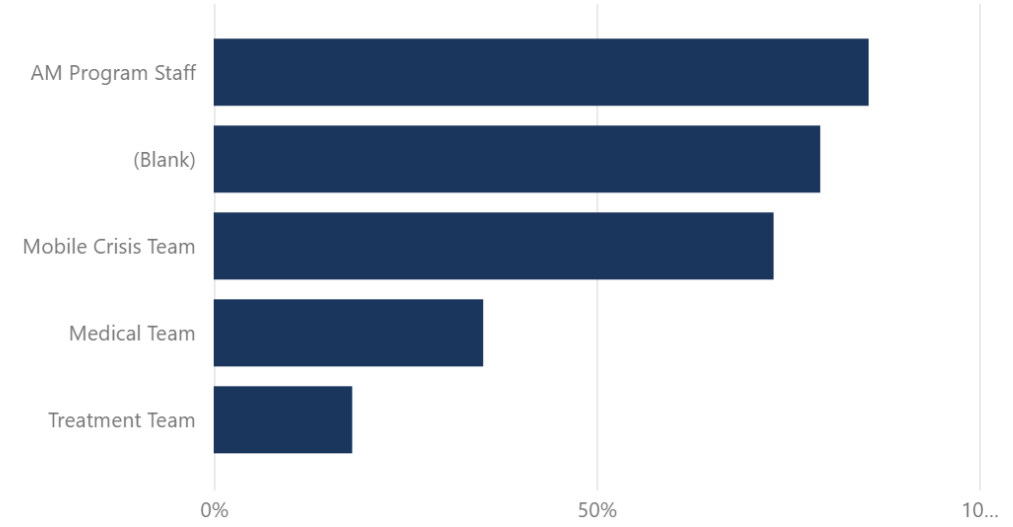
Staff Role
All

+

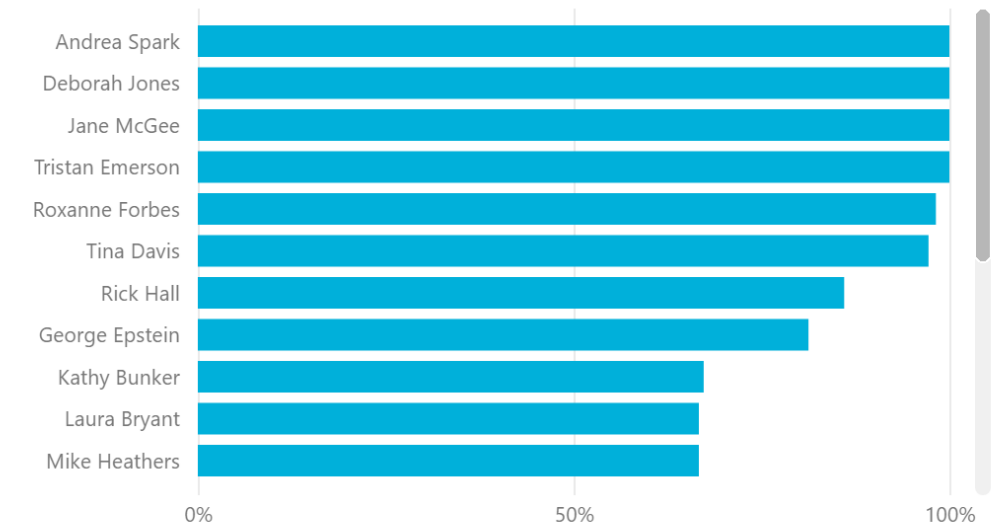
% Required Forms Not Created by Staff



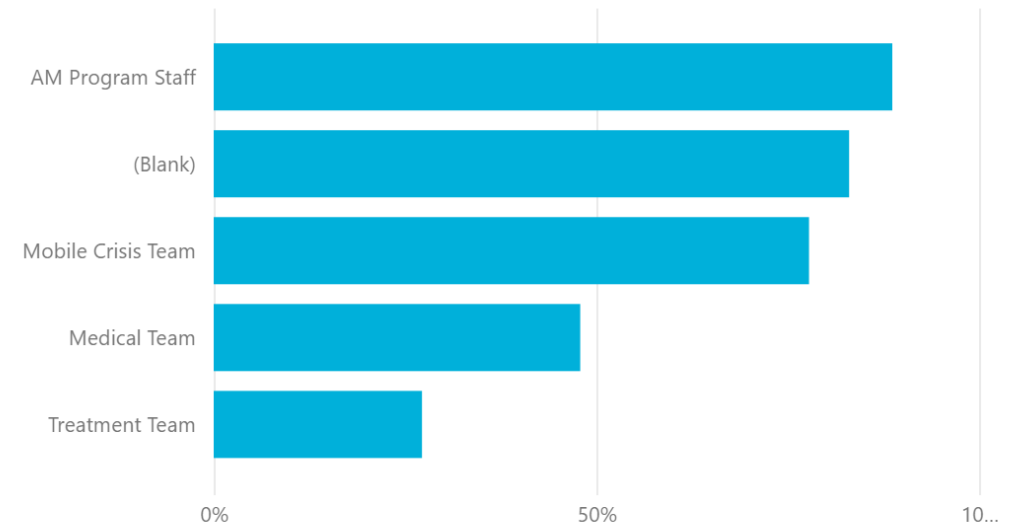
% Required Forms Not Created by Team



% Required Forms Not Signed by Staff



% Required Forms Not Signed by Team



Distance

Choose Client

All



Programs

All



Locations

All



Services

All



Activities

All



Payer Categories

All



Payers

All



Billable Service

All



Staff

All



Staff Status

All



Staff Role

All



Location Distances

● Agency Office ● Client Home ● Client Work ● School ● Staff Home

