Information Verification by Method of Data Collection

ISP Data (Caseload Based)	***Location***	***Result***
ISP Data Search • Click on the **Search** link located beside the 'ISP Data' option from the 'Individual' tab of the dashboard. • Click on the **Excel Exports** link located at the bottom left on the search results page.	• 'Individual' tab • Individual Home Page	• A list of entered ISP Data that matches the entered search parameters will be shown.
ISP Data Report • Click on the **Report** link located beside the 'ISP Data' option from the 'Individual' tab of the dashboard.	• 'Individual' tab • Individual Home Page	• Create individual based report for one or more ISP Programs. • Programmatic/Clinician/Daily Collection reports are available to be generated and can be created with comments.
ISP Data (Agency Based)	***Location***	***Result***
ISP Data Basic Report • Click on the **View** link located beside the 'Report Library' option from the 'Agency Reports' tab of your dashboard. • On the 'List of Reports' page, enter 'ISP Data Basic Report' in the Report Name field and click on the **Search** Button.	• Report Library	• The 'ISP Data Basic Report' will show all ISP Data collected during the specified time frame. A detailed version is also available if scores are needed, but will produce multiple rows. • This report will indicate if billable data was collected and note the collection method of the data (Billable data will be blank if collected via EVV). The Billed column will only change after billing has been generated.

ISP Data Schedule and Frequency Report • Click on the **View** link located beside the 'Report Library' option from the 'Agency Reports' tab of your dashboard. • On the 'List of Reports' page, enter 'ISP Data Schedule and Frequency Report – Daily/Weekly/Monthly' in the Report Name field and click on the **Search** button.	• Report Library	• This report will show the ISP Program for all individuals and the number of pieces of documentation that has been collected on the corresponding individuals for the given day/week/month time period. A variance is also calculated against the expected number of data collection points listed in the ISP Program. • Regardless of the Method of Data Collection, this report will work for all ISP Data.
ISP Data Report from EVV • Click on the **View** link located beside the 'Report Library' option from the 'Agency Reports' tab of your dashboard. • On the 'List of Reports' page, enter 'ISP Data Report from EVV' in the Report Name field and click on the **Search** button.	• Report Library	• The 'ISP Data Report from EVV' report will show the shifts configured for submitting ISP Data during the specified time frame and whether or not ISP Data was collected for the shift. Comment information is also available for both the slot and ISP Data in this report. • If the 'ISP Data Date of Service' column is blank, no ISP Data was collected for that shift. If the 'Billed Service Date' column is blank, billing has not yet been generated for this service. • Only ISP Data collected via the EVV Method of Data Collection will show in this report.

Scheduling/EVV (Caseload and Agency Based)	*Location*	*Result*
Schedule ● Click on the **Create/Edit** link located beside the 'Schedule' options from the 'Agency' or 'Individual' tab of the dashboard.	● 'Agency' tab ● 'Individual' tab	● This will show a color coded view of the schedule. You may utilize filters to look for specific information. Unfinished shifts will appear in orange and will have red borders. ● In order to update a Scheduling Data with correct Check In/Out, make sure to edit the Check-In/Out information as opposed to the Scheduled In/Out time. ● If ISP Data is attached to a shift, the ISP Data can be viewed/collected/updated from each shift.
Schedule/EVV Dashboard ● Click on the **Schedule/EVV Dashboard** link located beside the 'Schedule' section on the 'Agency' or 'Individual' tab of the dashboard.	● 'Agency' tab ● 'Individual' tab	● This will show the option to pull aggregated scheduling data with several filtering options for a specified time period for up to 2 weeks. ● The following fields should be reviewed: Billable, Service Selected, Check-In/Out 15 Minute Window, ISP Data Collection, Expired Service Auth, Generated for Billing, Overlapping Staff/Individual, Mismatching Dates, Staff type Schedule. ● This information can be exported as Excel for further review.

Scheduling/EVV (Agency Based)	*Location*	*Result*
Scheduling/EVV Basic Slot Report ● Click on the **View** link located beside the 'Report Library' option from the 'Agency Reports' tab of your dashboard. ● On the 'List of Reports' page, enter 'Scheduling/EVV - Basic Slot Report' in the Report Name field and click on the **Search** button.	● Report Library	● The 'Scheduling/EVV - Basic Slot Report' will show all slot information during the specified time frame. A version with exception code/description is also available. ● You may use this report to double check that a service was selected and that the slot was marked as billable if used for billing, or if the time duration is too short or too long. If Staff Worked Duration is blank, check in/out time is missing. The variance column can be used to compare time for pre-scheduled shifts. ● If a shift was edited in any way, it will be noted in the Edited by Scheduler column. Comments and Travel Miles can also be viewed on this report.

Attendance (Caseload Based)	*Location*	*Result*
Attendance ● Click on the **New** or **Search** link located beside the 'Attendance' option from the 'Billing' tab of your dashboard.	● 'Attendance' section on the 'Billing' tab.	● This will show a color-coded view of the Attendance grid. You may enter, view and/or update Attendance data from the attendance grid. Attendance data needs to be updated with correct information before moving forward with generating Billing from Attendance. ● You may also generate PDF reports for the Attendance data. The Statistic's Report shows total counts for different Attendance options for the selected date range.
Attendance Summary ● Click on the **Summary** link located beside the 'Attendance' option from the 'Billing' tab of the dashboard.	● 'Attendance' section on the 'Billing' tab.	● This will provide an overall review of the Attendance data based on the caseload. You may apply additional filters on the information. The Status filter can be used to check for approvals and/or if information has been generated for billing.
Attendance (Agency Based)	*Location*	*Result*
Attendance Exception Report ● Click on the **View** link located beside the 'Report Library' option from the 'Agency Reports' tab of your dashboard. ● On the List of Reports' page, enter 'Attendance Exception Report' in the Report Name field and click on the **Search** button.	● Report Library	● This report will list any days where an entry is not listed for the specified time frame.

Attendance Summary Report ● Click on the **View** link located beside the 'Report Library' option from the 'Agency Reports' tab of your dashboard. ● On the 'List of Reports' page, enter 'Attendance Summary Report with Expanded Details' in the Report Name field and click on the **Search** button.	● Report Library	● This report will show attendance and generated billing information, as well as details regarding when an entry was updated.

<table>
<tr><th>Case Note (Caseload Based)</th><th>Location</th><th>Result</th></tr>
<tr><td>Case Note Search
Click on the Search link located beside the ‘Case Note’ option from the ‘Individual tab’ or ‘Individual Home Page’ tab of your dashboard.
Click on the Export to Excel link in order to export the search result into an Excel file.</td><td>‘Individual’ tab
Individual Home Page</td><td>A list of entered Case Notes for the selected time frame. Available in detailed export if additional information is needed.</td></tr>
<tr><td>Case Note (Agency Based)</td><td>Location</td><td>Result</td></tr>
<tr><td>Audit - Case Note - Updated/Late Entry
Click on the View link located beside the ‘Report Library’ option from the ‘Agency Reports’ tab of your dashboard.
On the ‘List of Reports’ page, enter ‘Audit - Case Note - Updated/Late Entry’ in the <u>Report Name</u> field and click on the Search button.</td><td>Report Library</td><td>The ‘Audit - Case Note - Updated/Late Entry’ report will show Case Note data that is connected to an Approved or Discontinued Service Authorization. Along with basic Case Note information this report will show update information of the data and the Service Authorization Form ID. Multiple search options are available for this report.</td></tr>
<tr><td>Case Note Time Overlap Report
Click on the View link located beside the ‘Report Library’ option from the ‘Agency Reports’ tab of your dashboard.
On the ‘List of Reports’ page, enter ‘Case Note Time Overlap Report’ in the <u>Report Name</u> field and click on the Search button.</td><td>Report Library</td><td>The ‘Case Note Time Overlap Report’ will show overlapping Case Notes of an individual for a specific Service Date range and/or Templates. Selecting a Template Name will show overlapping Case Notes for that template with other templates. Keeping the Template Name blank will show overlapping Case Notes across all templates.</td></tr>
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