



HomeTrak

Your expert companions in home care software

HomeTrak Companion

CRM-Client Relationship/Referral Management Process

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Introduction

Welcome!

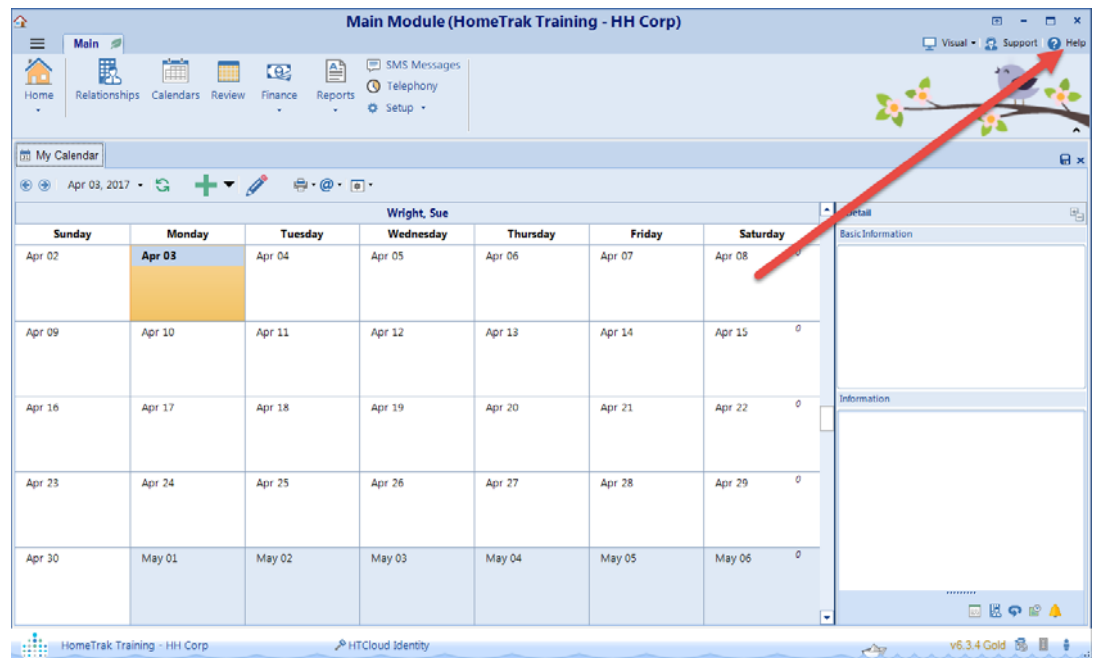
Hello and welcome to the world of HomeTrak Companion!

By now, you will have access to your HomeTrak Database, and are ready to begin training. How exciting!

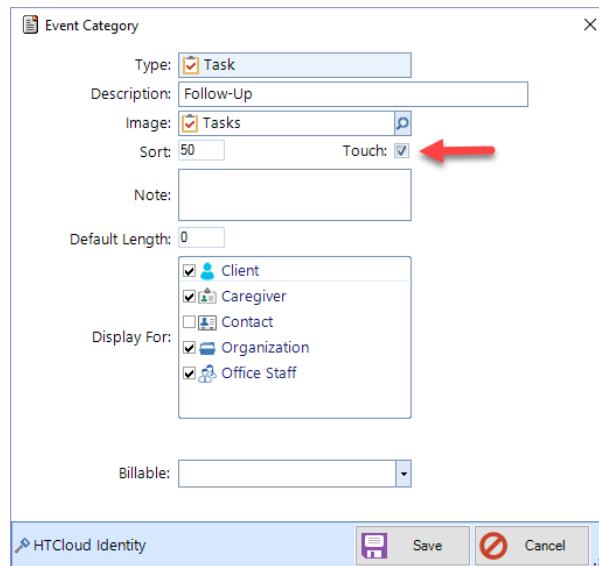
This module will outline how HomeTrak Companion can assist you in developing your referral sources, help organize your time and produce some useful reports!

If you ever have questions along the way, don't forget to access our extremely proficient Help System located on your HomeTrak Home Page.

You are also able to contact your HomeTrak Trainer or Customer Support.



User Defined Options

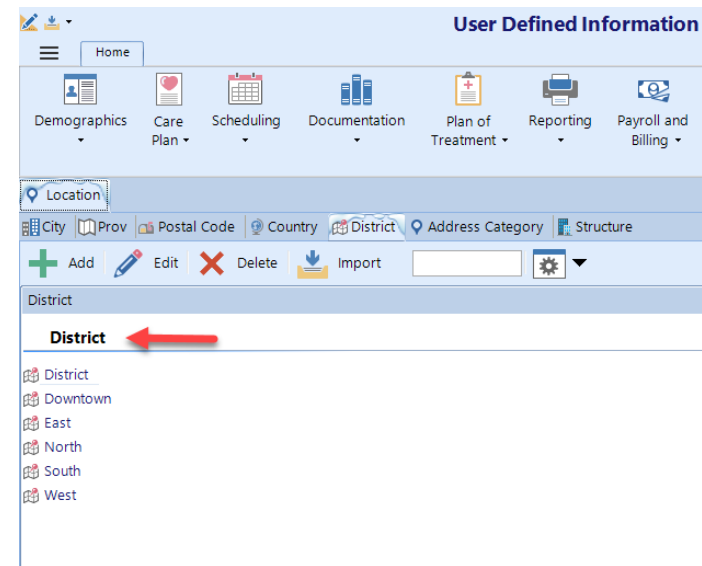


The screenshot shows the 'Event Category' configuration window. The 'Type' is set to 'Task'. The 'Description' is 'Follow-Up'. The 'Image' is 'Tasks'. The 'Sort' is '50'. The 'Touch' checkbox is checked and highlighted with a red arrow. The 'Note' field is empty. The 'Default Length' is '0'. The 'Display For' section has checkboxes for 'Client', 'Caregiver', 'Contact', 'Organization', and 'Office Staff', all of which are checked. The 'Billable' dropdown is set to 'No'. The window has 'Save' and 'Cancel' buttons at the bottom.

Touch Flag:

Scheduling → Appointment/Task Categories

- Check the *Touch* box to all Appointment and Task Categories that you want to track for CRM purposes.



The screenshot shows the 'User Defined Information' interface. The 'Location' section is expanded, showing a list of 'District' options: 'District', 'Downtown', 'East', 'North', 'South', and 'West'. The 'District' option is highlighted with a red arrow. The interface includes a navigation bar with 'Home' and various icons for Demographics, Care Plan, Scheduling, Documentation, Plan of Treatment, Reporting, and Payroll and Billing. Below the navigation bar are fields for City, Prov, Postal Code, Country, District, Address Category, and Structure. There are also buttons for Add, Edit, Delete, and Import.

Districts:

Demographics → Location → District

- Define all of your Districts here choosing *Add*.
- Districts should be decided by dividing your area of service into a way that is most meaningful for your agency
i.e. North, South, East, West

Adding an Organization

Information to Include:

1. Choose a **Category** the Organization falls under
2. After filling in appropriate demographic information, choose a **District** (these will have been set up for you, prior to training). Choosing a **District** allows for beneficial reporting and data mining.
3. Choose which **Rank** the Organization falls under. The **Rank** helps to manage which referral sources are more beneficial than others (it is up to your Agency to decide how to rank).

The screenshot shows a web form titled "Add New" for adding an organization. The form is divided into several sections:

- Role:** A dropdown menu set to "Organization".
- Category:** A dropdown menu set to "Organization", highlighted with a red callout "1".
- Name:** A text input field.
- Note:** A text input field.
- Type:** A dropdown menu set to "Billing".
- Address 1:** A text input field.
- Address 2:** A text input field.
- City:** A text input field.
- Province:** A dropdown menu.
- Postal:** A text input field.
- District:** A dropdown menu, highlighted with a red callout "2".
- Demographics:** A section containing:
 - Birth Date:** A dropdown menu set to "01/01/1900".
 - SSN:** A text input field.
 - Gender:** A dropdown menu set to "Unspecified".
 - Health Num:** A text input field.
- Status:** A dropdown menu set to "Active".
- Date:** A date and time selector set to "Jan 03, 2017" and "12:00 AM".
- Language:** A dropdown menu set to "English".
- Rank:** A dropdown menu set to "Average", highlighted with a red callout "3".
- Phone:** Two text input fields for "Phone" and "x".
- Phone 2:** Two text input fields for "Phone 2" and "x".
- Cell:** A text input field.
- Email:** A text input field.
- Event Pattern:** A dropdown menu.

At the bottom of the form, there is a "Save" button and a "Cancel" button. The footer of the form displays "HTCloud Identity".

Relationships

To Add:

1. Click **Add** to Add a New Person
2. Choose which Type of Person you are Adding
3. Choose a Category for this person to fall under (This is reflective of their job title).
4. Fill in necessary Demographic information. If their address is the same as the Organization, you can choose the drop down here and choose "Paste Address from Primary Record".
5. Click **Save**

*Note: You can add as many People to each Profile as needed.

The screenshot shows the 'Relationships' tab in a software interface. The 'Add' button is highlighted with a red callout '1'. A dropdown menu is open, showing options: 'Add Emergency Contact', 'Add Individual', 'Add Contact' (highlighted with a red callout '2'), 'Add Organization', and 'Add Manager'. Below this, the 'Add New' form is shown. The 'Role' dropdown is set to 'Contact' (callout '3'). The 'Category' dropdown is set to 'Doctor' (callout '3'). The 'Type' dropdown is set to 'Billing' (callout '4'). The 'Save' button at the bottom right is highlighted with a red callout '5'. The form includes fields for Name, Note, Address 1, Address 2, City, State, Zip, District, Status, Date, Language, Rank, Phone, Cell, Email, Birth Date, SSN, Gender, Health Num, and Event Pattern.

Select Person (Any Module) in Relationships → Click + Add

Smart Scheduling

Find and Filter:

Using the Find and Filter option within Organizations allows you to filter by District, Rank, etc.

This way you are able to see in which category of referrals you are falling short, or see in which District the bulk of your referrals are coming from.

Simply click through the Organizations listed and schedule appointments and tasks as necessary. You have the ability to add events onto any individual's calendar within HomeTrak.

***Note: Go to Help System, click Scheduling and review Single Events or Recurring Events to learn how to add an Appointment or Task.**

The screenshot displays the HomeTrak software interface. On the left, a list of organizations is shown under the heading 'All Organizations'. A red arrow points to the 'Filter' button. The 'Advanced Filter' dialog box is open, showing various filter options. The 'Rank' filter is selected, and its legend is visible, showing categories: Lowest (blue), Low (purple), Average (green), High (yellow), and Highest (red). Red arrows point to the 'Rank' filter and the 'Advanced Filter' dialog box. The background shows a calendar view for January 2017, with dates Jan 04, Jan 11, Jan 18, and Jan 25 visible.

Setup a Referral

Add New:

1. Choose the Organization, Referrer and Category of the Referral source by choosing the magnifying glass beside each option.
2. *Optional:* Attach the Office Person (Sales person) who is responsible for that Organization/Referral source.

Setup a Referral (HomeTrak Demonstration Office)

Date: Jan 02, 2017

Organization: Better HealthCare

Referrer: Dr Jennifer Hogan

Category: Hospital

Optional

Office Person: Downes, John

Referred: Adams, Abby

Notes

+ Add Edit X Delete

HTCloud Identity Save Cancel

Referral Reports

Once in Reporting Screen:

1. To view New Referrals, choose **Other, Referrals, People Referred** (top picture). Choose a specific date range and filter options to the left and choose **View Data**.
2. To view Tasks and Appointments, choose **Other, Organization, Tasks and Appointments**. Choose the date range and filter options. The right hand panel will highlight notes and details of each appointment (office staff must input notes and information).

Reporting (Moyras Test Office) - People Referred

Person / Organization	Current Status	Status Date	Referral Date	Days	Referral Category	Organization	Referrer
Smythe, Ernestine	Active	Mar 08, 2016	Mar 04, 2016	4	Hospital	Better HealthCare	Dr Jennifer Hogan
Roberts, Emmie	Potential	Mar 07, 2016	Mar 07, 2016	0	Church	St. John the Devine	Smith, John
Jones, Celia	Assessed	Mar 11, 2016	Mar 09, 2016	2	Hospital	Doctors Hospital	Marshall, Kevin

Reporting (Moyras Test Office) - Tasks and Appointments

Person / Company	Type	Start Date	End Date
760 AM KFMB Talk Radio	Appointment	Mar 07, 2016 09:00 AM	Mar 07, 2016 10:00 AM
Caring Friends Home	Appointment	Mar 08, 2016 10:00 AM	Mar 08, 2016 11:00 AM
Cathcart Pharmacy	Appointment	Mar 09, 2016 08:00 AM	Mar 09, 2016 09:00 AM
Church of Christ	Appointment	Mar 09, 2016 10:30 AM	Mar 09, 2016 11:30 AM
Coronado Hospital	Appointment	Mar 07, 2016 11:30 AM	Mar 07, 2016 12:30 PM
Fannel Chiropractic	Appointment	Mar 07, 2016 10:00 AM	Mar 07, 2016 11:00 AM
Mercy Health Center	Appointment	Mar 10, 2016 12:30 PM	Mar 10, 2016 01:30 PM
San Diego Times Tribune Her...	Appointment	Mar 08, 2016 09:00 AM	Mar 08, 2016 10:00 AM

Appointment Details (Mar 07, 2016 09:00 AM - 10:00 AM):

- Category: Sales Meeting
- Primary: 760 AM KFMB Talk Radio
- Address: 7677 Engineer Road San Di...
- People: Black, Ray; Frank Jones
- Meeting to discuss marketing strategies

Notes:

very successful meeting
We discussed some strategies for radio air time. I will take some time and look over options and decide for next meeting. Set meeting for next week

Client Referrals Report

Report Generated:

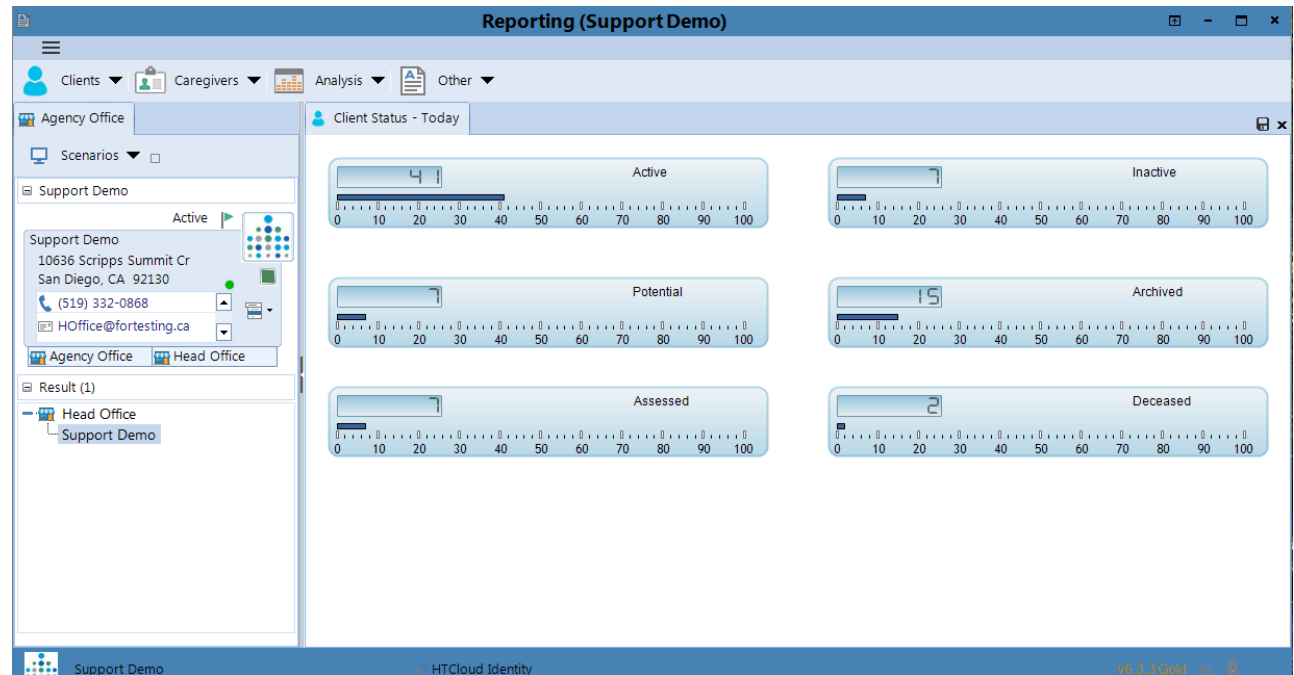
The *Referrals Report* summarizes all referral information for a specific date range. This report will only be valid if users utilize *Status* features for referrals since its main focus is showing how long a referral moves through the agency based on their status (from Potential status to Active status).

Person / Organization	Current Status	Status Date	Referral Date	Days	Referral Category	Organization	Referrer	Credited Office Staff	
Margett, Bill	Active	Aug 04, 2015	Aug 01, 2015	3	Facility	Paradise Hills Center		Simpson, Alex	
Aguirre, Madeleine	Active	Aug 07, 2015	Aug 03, 2015	4	Mailer	Wagner, Dennis Wagner	Dr. Dennis R. Wagner	Simpson, Alex	
Mccall, Timothy	Active	Aug 10, 2015	Aug 04, 2015	6	Retirement Hom	Client Referral	Vision Nursing Home	Frank Jones	
Atkins, Atty	Active	Sep 24, 2015	Sep 21, 2015	3	Hospital	Better HealthCare	Dr. Jimmy Jones		
Preece, Philip	Active	Oct 08, 2015	Oct 05, 2015	3	Facility	Paradise Hills Center			
Vision Nursing Home	Active	Nov 18, 2015	Nov 16, 2015	2	Company Sales	Other Sources	Frank Jones		
Jones, James	Active	Dec 08, 2015	Dec 01, 2015	7	Church	Hope Baptist Church			
Clothier, Bert	Closed	Dec 18, 2015	Sep 02, 2015	107	Hospital	Miami Hospital		Frank Jones	
Lamb, Dirk	Active	Jan 29, 2016	Feb 19, 2016	-21	Website	Other Sources			
Zanders, Virginia	Active	Feb 02, 2016	Jan 28, 2016	5	Hospital	Mercy Health Center			
Briggs, John	Active	Feb 12, 2016	Feb 08, 2016	4	Sign	Other Sources		Simpson, Alex	
Cafferty, Jim	Active	Feb 14, 2016	Dec 15, 2015	61	Retirement Hom	Mercy Hospital and Medical	Abbott, William		
Jo, James	Closed	Feb 29, 2016	Nov 19, 2015	102	Website	Other Sources			
Soullie, Mary	Active	Mar 09, 2016	Mar 04, 2016	5	Friend	Client Referral	Jones, Betty		
Bellaire, Marcy	Active	Mar 16, 2016	Mar 01, 2016	15	Radio	760 AM KFMB Talk Radio			
Stonehouse, Brianne	Closed	Jul 13, 2016	Sep 14, 2015	303	Radio	760 AM KFMB Talk Radio			
Simpson, John	Potential	Aug 25, 2016	Aug 25, 2015	366	Doctor	Better HealthCare	Dr Jennifer Hogan		
Total: 17				Avg: 57					

Client Status -Today Report

Report Generated:

The *Client Status-Today* Report is a dashboard style report that shows the number of Clients within each Status category. This data is collected by updating Client's statuses whenever necessary.



Client Lead Funnel Reports

Report Generated:

1. The *Inquiry Report* (top) provides a 12 month analysis of *Inquiry* clients added per month, and how many of those clients progressed through *Potential* and *Assessed*, into the *Active* Status.
2. The *Potential Report* (bottom), provides a 12 month analysis of *Potential* clients added per month, and how many of those clients progressed through *Assessed*, and became *Active*.

Reporting (Support Demo)

Client Lead Funnel - Inquiry

Inquiries to Active

Agency Office	Month	Inquiries	Potential	Assessed	Active	% Inquiry to Potential	% Inquiry to Assessed	% Inquiry to Active
Support Demo	Mar, 2016	1	1	1	1	100.0%	100.0%	100.0%
Support Demo	Apr, 2016	0	0	0	0	0.0%	0.0%	0.0%
Support Demo	May, 2016	0	0	0	0	0.0%	0.0%	0.0%
Support Demo	Jun, 2016	0	0	0	0	0.0%	0.0%	0.0%
Support Demo	Jul, 2016	0	0	0	0	0.0%	0.0%	0.0%
Support Demo	Aug, 2016	0	0	0	0	0.0%	0.0%	0.0%
Support Demo	Sep, 2016	1	1	1	1	100.0%	100.0%	100.0%
Support Demo	Oct, 2016	6	5	5	3	83.3%	83.3%	50.0%
Support Demo	Nov, 2016	1	1	1	1	100.0%	100.0%	100.0%
Support Demo	Dec, 2016	0	0	0	0	0.0%	0.0%	0.0%
Support Demo	Jan, 2017	0	0	0	0	0.0%	0.0%	0.0%
Support Demo	Feb, 2017	0	0	0	0	0.0%	0.0%	0.0%
Support Demo	Mar, 2017	1	1	1	0	100.0%	100.0%	0.0%

Reporting (Support Demo)

Client Lead Funnel - Potential

Potential to Active

Agency Office	Month	Potential	Assessed	Active	% Potential to Assessed	% Assessed to Active	% Potential to Active
Support Demo	Jan, 2016	5	3	2	60.0%	66.7%	40.0%
Support Demo	Feb, 2016	3	2	1	66.7%	50.0%	33.3%
Support Demo	Mar, 2016	3	3	2	100.0%	66.7%	66.7%
Support Demo	Apr, 2016	6	4	3	66.7%	75.0%	50.0%
Support Demo	May, 2016	3	1	1	33.3%	100.0%	33.3%
Support Demo	Jun, 2016	3	1	1	33.3%	100.0%	33.3%
Support Demo	Jul, 2016	2	2	1	100.0%	50.0%	50.0%
Support Demo	Aug, 2016	7	4	3	57.1%	75.0%	42.9%
Support Demo	Sep, 2016	10	8	3	80.0%	37.5%	30.0%
Support Demo	Oct, 2016	2	2	2	100.0%	100.0%	100.0%
Support Demo	Nov, 2016	5	4	4	80.0%	100.0%	80.0%
Support Demo	Dec, 2016	2	0	0	0.0%	0.0%	0.0%
Total: 12		51	34	23	64.8%	68.4%	46.6%

Summary by Month Report

Report Generated:

This report shows:

- A configurable pivot grid showing appointments made with Organizations
- Grouped by Organization Category; then grouped Organization
- You are able to “Drag and Drop” other options to be included in the report (i.e. Organization City, or Year)
- In order for Organization’s data to show in this report, their Status must be *Active*, as well they must have appointments/tasks scheduled (with duration).

Month	Organization C...	Organization Name	Touches	Referrals	Active Clients	Month Hours	Month Total	Month Average	Billing Hours	Sum	Billing Amount	Sum	Average
Grand Total													
07 July	Advertising	760 AM KFMB Talk Radio	0.00	0	1	0.00	\$0.00	Error	0.00		\$0.00	Error	
		San Diego Times Tribune Herald	0.00	1	0	0.00	\$0.00	Error	0.00		\$0.00	Error	
	Advertising Total (2)		0.00	1	1	0.00	\$0.00	Error	0.00		\$0.00	Error	
	Doctor's Office	Harvey Simmons MD	1.00	0	0	0.00	\$0.00	Error	0.00		\$0.00	Error	
	Facility	Caring Friends Home	0.00	1	1	0.00	\$0.00	Error	0.00		\$0.00	Error	
	Hospital	Better HealthCare	4.00	4	2	0.00	\$0.00	Error	51.50		\$942.90	18.31	
		Coronado Hospital	4.00	0	0	0.00	\$0.00	Error	0.00		\$0.00	Error	
		Mercy Hospital and Medical Center	2.00	0	0	0.00	\$0.00	Error	0.00		\$0.00	Error	
		Scripps Memorial Hospital	0.00	1	0	0.00	\$0.00	Error	0.00		\$0.00	Error	
	Hospital Total (4)		10.00	5	2	0.00	\$0.00	Error	51.50		\$942.90	18.31	
	Internal	Client Referral	0.00	0	1	26.00	\$547.30	21.05	52.00		\$1,094.60	21.05	
		Other Sources	0.00	1	0	0.00	\$0.00	Error	0.00		\$0.00	Error	
	Internal Total (2)		0.00	1	1	26.00	\$547.30	21.05	52.00		\$1,094.60	21.05	
	Owns	Wagner, Dennis Wagner	0.00	0	0	0.00	\$0.00	Error	0.00		\$0.00	Error	
07 July Total (11)			11.00	8	5	26.00	\$547.30	21.05	103.50		\$2,037.50	19.69	
08 August	Advertising	760 AM KFMB Talk Radio	1.00	0	0	0.00	\$0.00	Error	0.00		\$0.00	Error	
		San Diego Times Tribune Herald	0.00	0	0	0.00	\$0.00	Error	0.00		\$0.00	Error	
	Advertising Total (2)		1.00	0	0	0.00	\$0.00	Error	0.00		\$0.00	Error	
	Doctor's Office	Harvey Simmons MD	0.00	0	0	0.00	\$0.00	Error	0.00		\$0.00	Error	
	Facility	Caring Friends Home	0.00	0	0	0.00	\$0.00	Error	0.00		\$0.00	Error	
	Hospital	Better HealthCare	10.00	0	2	8.00	\$208.00	26.00	8.00		\$208.00	26.00	
		Coronado Hospital	2.00	0	0	0.00	\$0.00	Error	0.00		\$0.00	Error	
		Mercy Hospital and Medical Center	9.00	0	0	0.00	\$0.00	Error	0.00		\$0.00	Error	
		Scripps Memorial Hospital	0.00	0	0	0.00	\$0.00	Error	0.00		\$0.00	Error	
	Hospital Total (4)		21.00	0	2	8.00	\$208.00	26.00	8.00		\$208.00	26.00	
	Internal	Client Referral	0.00	0	0	0.00	\$0.00	Error	0.00		\$0.00	Error	
		Other Sources	0.00	0	0	0.00	\$0.00	Error	0.00		\$0.00	Error	
	Internal Total (2)		0.00	0	0	0.00	\$0.00	Error	0.00		\$0.00	Error	
	Owns	Wagner, Dennis Wagner	0.00	1	1	0.00	\$0.00	Error	0.00		\$0.00	Error	
08 August Total (11)			22.00	1	3	8.00	\$208.00	26.00	8.00		\$208.00	26.00	
Grand Total (22)			33.00	9	8	34.00	\$755.30	22.21	111.50		\$2,245.50	20.14	

Times Contacted Report

Report Generated:

This report shows:

- A configurable pivot grid showing Tasks and Appointments with Organizations, and organizes them by the event category

You are able to report by:

- *Organization*
- *Organization Category or*
- *By Manager*

Rank	Type	Minutes	Date	Month	Quarter	Year	Zip	District	City	State	Country
Count											
Category											
Manager	Organization Category	Organization	Phone Call (referrals)	Sales Meeting	Grand Total						
Frank Jones	Hospital	Better HealthCare	1.00	13.00	14.00						
		Coronado Hospital		12.00	12.00						
		Mercy Hospital and Medical Center		11.00	11.00						
	Hospital Total (3)		1.00	36.00	37.00						
Simpson, Alex	Advertising	760 AM KFMB Talk Radio	1.00		1.00						
	Doctor's Office	Harvey Simmons MD		1.00	1.00						
Simpson, Alex Total (2)			1.00	1.00	2.00						
Grand Total (5)			2.00	37.00	39.00						

Referrals Received Report

Report Generated:

This report shows:

- A configurable pivot grid that shows all referrals received for that date range specified

It can be grouped by:

- *Organization*
- *Referral Category*
- *Referrer*

Month	Referral Category	Organization	Referrer	Date	Count	
07 July	Facility	Caring Friends Home		07/13/2015 12:00:00 AM	1.00	
		Better HealthCare		07/02/2015 12:00:00 AM	1.00	
	Hospital			07/07/2015 12:00:00 AM	1.00	
				07/08/2015 12:00:00 AM	2.00	
		Total (3)			4.00	
			Scripps Memorial Hospital		07/02/2015 12:00:00 AM	1.00
		Hospital Total (4)				5.00
		Mailer			07/31/2015 12:00:00 AM	2.00
	Newspaper	San Diego Times Tribune Herald		07/08/2015 12:00:00 AM	1.00	
	Website	Other Sources		07/15/2015 12:00:00 AM	1.00	
07 July Total (8)					10.00	
08 August	Unspecified Source	Wagner, Dennis Wagner	Dr. Dennis R. Wagner	08/11/2015 12:00:00 AM	1.00	
Grand Total (9)					11.00	

Client Status Added by Referral Report

Report Generated:

This report shows:

- A configurable pivot grid showing *Statuses* added to *Clients* within the database in the specific date range.

The information can be grouped by:

- *Referral Category*
- *Organization or*
- *Person*

Referral Organization	Person / Company	Status	Status Date	Potential	Assessed	Active	Grand Total
Crawford, Cindy	Crawford, Cindy	Potential	Jul 07, 2015	1			1
		Assessed	Jul 15, 2015			1	1
		Active	Jul 31, 2015			1	1
Crawford, Cindy Total (3)				1	1	1	3
Smith, Will	Smith, Will	Potential	Jul 03, 2015	1			1
		Assessed	Jul 23, 2015			1	1
		Active	Aug 05, 2015			1	1
Smith, Will Total (3)				1	1	1	3
Total (6)				2	2	2	6
760 AM KPMB Talk Radio	Farnsworth, Grace	Assessed	Jul 08, 2015			1	1
		Active	Jul 20, 2015			1	1
Farnsworth, Grace Total (2)						1	2
Youngblood, Gary	Youngblood, Gary	Potential	Jul 01, 2015	1			1
		Assessed	Jul 02, 2015			1	1
Youngblood, Gary Total (2)				1	1		2
760 AM KPMB Talk Radio Total (4)				1	2	1	4
Better HealthCare	Fonda, Jane	Potential	Jul 08, 2015	1			1
		Assessed	Jul 15, 2015			1	1
		Active	Aug 10, 2015			1	1
Fonda, Jane Total (3)				1	1	1	3
Hawn, Goldie	Hawn, Goldie	Potential	Jul 06, 2015	1			1
		Assessed	Jul 22, 2015			1	1
		Active	Jul 31, 2015			1	1
Hawn, Goldie Total (3)				1	1	1	3
Jackson, Bo	Jackson, Bo	Potential	Jul 01, 2015	1			1
		Assessed	Jul 14, 2015			1	1
		Active	Jul 27, 2015			1	1
Jackson, Bo Total (3)				1	1	1	3
Ricardo, Lucy and ...	Ricardo, Lucy and ...	Potential	Jul 06, 2015	1			1
		Assessed	Jul 21, 2015			1	1
		Active	Aug 03, 2015			1	1
Ricardo, Lucy and Ricky Total (3)				1	1	1	3
Ruby, Millie	Ruby, Millie	Potential	Jul 02, 2015	1			1
		Assessed	Jul 02, 2015			1	1
Better HealthCare Total (13)				4	5	4	13
Caring Friends Home	Jordan, Michael	Potential	Jul 01, 2015	1			1
		Assessed	Jul 13, 2015			1	1
		Active	Jul 27, 2015			1	1
Jordan, Michael Total (3)				1	1	1	3

Revenue - Billing vs Payroll by Referral Report

Report Generated:

This report shows:

- A configurable pivot grid showing Payroll versus Billing sales information, and is grouped by *Organization*
- You also have the option of “Drag and Drop” to group by *Referrer, Category, etc.*

Reporting (Moyras Test Office)

Agency Office: Moyras Test Office

Date Range: Start Date: Jul 01, 2015; End Date: Aug 31, 2015

Bill vs Pay - by Referral

Category	Call Type	Caregiver	Payer	Client Category	Caregiver Category	Date	Year	Month	Quarter	Week of Year	Zip Code	District	City	State	Country	Structure	Agency Office	Hour Type
Rate Type	Rate Source Type	Billing...	Billing...	Payro...	Payro...	Payro...	Pay B...	Profit	Gross...	Drop Column Fields Here								
Referred Credited	Organization	Client	Referrer	Billing Count	Billing Hours	Billing Amount	Payroll Count	Payroll Hours	Payroll Amount	Pay Burdens	Profit	Gross Margin						
Grand Total				911	3,208.75	\$45,579.75	518	2,435.00	\$21,879.71	\$13,201.96	\$20,418.09	44.80%						
Simpson, Alex	760 AM KPMB Talk Radio	Hunter, John		91	110.00	\$2,231.92	91	110.00	\$1,200.87	\$180.13	\$850.92	38.13%						
	Other Sources	Briggs, John		34	68.00	\$1,712.00	34	68.00	\$853.80	\$128.07	\$720.13	42.65%						
	Paradise Hills Center	Margett, Bill		13	26.00	\$436.80	27	54.00	\$667.44	\$100.12	-\$330.76	-75.72%						
	Wagner, Dennis Wagner	Aqurre, Madelene	Dr. Dennis R. Wagner	39	48.50	\$1,018.50	39	39.29	\$393.90	\$59.09	\$565.52	55.52%						
Simpson, Alex Total (4)				177	252.50	\$5,399.22	191	271.29	\$3,116.01	\$467.40	\$1,815.81	33.63%						
Frank Jones	Better HealthCare	Atkins, Atty	Dr. Jimmy Jones	55	134.80	\$2,675.30	60	165.50	\$1,838.88	\$275.83	\$560.59	20.95%						
		Hawn, Goldie		20	0.00	\$0.00	20	45.00	\$511.10	\$76.67	-\$587.77	Error						
		Jackson, Bo		103	51.50	\$942.80	73	21.50	\$730.00	\$109.50	\$103.40	10.97%						
		Ricardo, Lucy and Ricky		2	8.00	\$208.00	2	8.00	\$96.00	\$14.40	\$97.60	46.92%						
Better Health-Care Total (4)				180	194.30	\$3,826.20	155	240.00	\$3,175.88	\$476.40	\$173.82	4.54%						
	Church of Christ	Broderick, Betty		52	1,240.00	\$13,104.00	58	831.61	\$6,517.73	\$977.66	\$5,608.61	42.80%						
	Client Referral	Mccall, Timothy	Vision Nursing Home	26	26.00	\$546.00	26	26.00	\$264.50	\$39.50	\$241.83	44.29%						
	Paradise Hills Center	Preece, Philip		36	140.00	\$2,098.48	36	140.00	\$1,471.92	\$220.79	\$1,005.77	37.27%						
Frank Jones Total (7)				274	1,608.30	\$20,174.68	275	1,237.61	\$11,430.13	\$1,714.52	\$7,030.03	34.85%						
	760 AM KPMB Talk Radio	Belore, Marcy		77	874.00	\$11,907.02	52	594.00	\$4,783.00	\$717.45	\$6,406.57	53.80%						
	Client Referral	Jones, Wendy	Jones, Betty	26	52.00	\$1,094.60	26	52.00	\$546.00	\$81.50	\$466.70	42.64%						
		Souley, Mary	Jones, Betty	62	122.00	\$2,591.00	62	122.00	\$1,446.00	\$216.90	\$928.10	35.82%						
Client Referral Total (2)				88	174.00	\$3,685.60	88	174.00	\$1,992.00	\$298.80	\$1,394.80	37.84%						
	Coronado Hospital	Reynolds, Debbie		75	1,481.00	\$15,773.97	71	987.33	\$7,720.58	\$1,158.09	\$6,895.30	43.71%						
		Zanders, Virginia		33	33.00	\$693.00	33	33.00	\$346.50	\$51.98	\$294.53	42.50%						
Coronado Hospital Total (2)				108	1,514.00	\$16,466.97	104	1,020.33	\$8,067.08	\$1,210.06	\$7,189.82	43.66%						
	Hope Baptist Church	Jones, James		35	50.50	\$962.40	35	50.50	\$589.99	\$88.50	\$283.92	29.50%						
	Mercy Hospital and Medical Ce...	Cafferty, Jim	Abbott, William	19	17.00	\$317.02	17	17.00	\$209.41	\$31.41	\$76.20	24.04%						
	Other Sources	Lamb, Dirk		88	87.00	\$2,099.00	88	87.00	\$925.82	\$138.87	\$1,034.31	49.28%						
		Vision Nursing Home	Frank Jones	34	204.00	\$4,182.00	34	204.00	\$2,269.50	\$340.43	\$1,572.08	37.59%						
Other Sources Total (2)				122	291.00	\$6,281.00	122	291.00	\$3,195.32	\$479.30	\$2,606.38	41.50%						
	Yellow Pages	McKenney, Francis		20	36.00	\$702.86	20	36.00	\$437.44	\$65.62	\$199.80	28.43%						
		Taylor, Ken		53	161.25	\$3,345.89	53	161.25	\$1,693.23	\$233.98	\$1,398.67	41.80%						
		Zangli, Toni		26	91.00	\$1,911.00	27	91.00	\$912.24	\$136.84	\$861.92	45.10%						
Yellow Pages Total (3)				99	288.25	\$5,959.75	100	288.25	\$3,042.91	\$456.44	\$2,460.40	41.28%						
Total (12)				548	3,208.75	\$45,579.75	518	2,435.00	\$21,879.71	\$3,201.96	\$20,418.09	44.80%						
Grand Total (23)				999	5,069.55	\$71,152.65	984	3,944.00	\$36,425.84	\$5,463.88	\$29,263.93	41.13%						

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