

MilestoneReports.com

Functional Overview

Agenda

- The Basics
- Getting Started
- Clients and Cases
- Authorizations
- Production
- Time Entry
- Payroll
- Lists and Reports
- How To's
- Final Thoughts

The Basics

What you'll need

- Connection to the Internet
- Internet Explorer
 - Version 6.0 or higher
 - JavaScript and Cookies enabled
- Adobe Acrobat Reader
- IESpell – recommended!

Signing-In

- User ID
- Password
 - Strong passwords are best
 - Mix letters, numbers, characters
- Remember ID option
 - Remember Password option
- Forgotten Password feature
 - Avoid duplicate email addresses

Security

- Security Roles
 - Administrator
 - Manager
 - Specialist
 - Production Coordinator
 - Production Specialist
- Secure Sockets Layer (SSL)
 - 128 bit encryption

Main Menu

- Your menu is based on your role
 - Clients and Cases
 - Production
 - Lists and Reports
 - Management
- Header
 - Breadcrumb navigation
 - Current User, Company (clickable)
 - Active/Inactive, Sign-Out

Recent Clients List

- Updated automatically
- Tracks last ten clients accessed
 - Click name to edit client
 - Click cases icon to view/edit cases
 - Click timecard icon to add a new timecard

User Profile

- All users can edit their own profile
- Managers can edit all employee profiles
- Keep your contact information current
 - Especially phone and email for contacting you
- Change your ID and password
 - You have the flexibility to change for yourself
- Preferences

Data Entry

- Basic rules
 - If it looks nice going in, it'll look nice on reports
 - Don't enter EVERYTHING IN CAPS or lowercase
- Efficiency
 - Spend the time to learn your browser (surf the Web!
 - [Tab] from field to field
 - [Enter] (sometimes) fires the closest button
 - Master the Windows clipboard: Cut, Copy, and Paste

Data Entry

- IESpell
 - If you want spell checking, we recommend this product from www.iespell.com
- Common gotcha's
 - Don't use the back button
 - Some screens have a *Refresh* button – don't confuse it with your browser's refresh button
 - Turn off any popup-blockers while using our site

Getting Started

Company Profile

- Only managers can view or edit
- Keep production wages accurate
 - Minimum wage, Production Wage
- Fee for Service information
 - Default billing rate, vendor ID, EIN
- Employee listing
 - Names, roles, email hyperlink
 - Can the access the system, last login date

Employees & Users

- Not all employees have to be users
- Employees
 - Contact lists
 - Case trustee for record keeping
 - Time entry for those cases
- Users
 - Are just employees with an ID and password
 - With access to a computer and the Internet

Trustees

- *In trust for the services of another*
- In the Milestone system...
 - A specialist who has access to a case
 - Trustees can grant other trustees access
 - Helps with
 - Record keeping, Time tracking, Security
 - Managers can access all clients, and all cases at all times

Trustee *Example*

- Users
 - Manager: Mitch
 - Specialists: Alice and Stuart
- Alice adds *Joe Client* and creates a case
 - By default, Alice is the trustee
 - Stuart *cannot* access Joe Client or his case
 - Mitch *can* access, because he is a manager
- For Stuart to access Joe Client
 - Alice or Mitch must add him as a trustee

Funding Sources

- Organizations that fund service activity
 - Examples: VR, H&W, Veterans Admin, etc.
- Maintained by the manager
- Invoiced through the Milestone System
- Counselors
 - Funding source representatives
 - Traditional counselors, liaisons, accountants

Tasks

- A list of activities and time entry codes
 - Backpay, Clerical, Sick hours, Vacation, etc.
- “Stuart’s list of codes range 6000-9000”
- Maintained by the manager

Clients and Cases

Clients

- Track full contact information
 - Many fields are optional
 - Specify as much as possible for accuracy
 - Email addresses!
- Payroll information
 - Defaults for time entry
- Cases and Reports
 - Lists cases, authorizations, and reports

Client Search

- You have 1000's of clients
- Display filter
 - Time entered within X days, Cases, All
- Employee filter
- Active/Inactive filter
- Search options
 - (Simple) First, last, both, number, SSN
 - City, State, Phone, *Fuzzy* search

Client Sort

- Main fields are returned in the grid
 - Gender, name, SSN, age, city/state, phone, email
 - Number of cases, authorizations, timecards
- Paging
- Most columns are sortable
 - Ascending, descending

Cases

- Represents services for a period of time
 - Think of a file in the file cabinet
 - Can have multiple cases for a client
- Think of a case as an arbitrary container
 - You can open a new one whenever
 - You can close one whenever
 - Change of services or circumstances

Case Example

- Joe Client shows up in March 2007
 - Client and case are created
 - 90 day authorization for service is allocated
 - Time is tracked for service delivered
 - Milestones met: authorization and case closed
 - Joe Client gains independence
- Joe Client returns in November 2008
 - Start a second case, and track notes separately, maintain the above history

Authorizations

Authorizations

- Represent fee-for-service funds from a funding source
 - For a specific client
 - For a specific date range
 - For a specific service
- Hours and (optionally) expenses
- A Case may contain many authorizations
- Use the Milestone system to invoice the funding source

Authorization Example

- Joe Client needs to find a job
 - Joe visits VR and they determine need
 - VR authorizes 40 hours at \$40/hour
 - You create an authorization in the Milestone system
 - You track time against this authorization
 - Use the *Management Report* to not go over!
 - Print invoice and documentation for VR
 - Use the *Batch Reports* to simplify this process!

Production

Setting up for Production

- Customers
 - Business who is paying for the production
 - Not the same as funding sources
 - Example: *ACME Rod & Reel*
- Locations
 - Workshop locations or other sites

Jobs

- Represent what is being produced
- Job
 - Start date, end date, description, contract
 - Hourly rate (defaults from Company profile)
- Job Steps
 - Can have 0, 1 or many job steps
 - Each is identified by a unique job step number
 - Seconds/Unit, Units/Hour, Pay Rate (computed)
- Print the *Work Order* from all job details

Time Entry

Time Entry

- A *Timecard* represents a time entry record
- Two types of timecards in the Milestone system
 - Authorization Timecard
 - Can't go over balances
 - Production Timecard
 - Associate job step, task, rates

Authorization Timecard

- Select employee
 - Manager or trustees are listed
- Date, Hours, Expense, and Mileage
 - Need hours and/or expense
- Billable vs. Non Billable
- Task, Task Description
- Copy button

Production Timecard

- Specify location
 - Optionally date/time in and out
- Specify job step
 - Enter number of units *or*
 - Hours, hourly rate, and productivity %
- Hourly Task
 - Select from list (we discussed this earlier)
 - Hours, hourly rate, and miscellaneous expense
- Exclude option (such as non-paid evaluations)

Attendance

- Quick way to track attendance hours
- Select client, month and year
- Capable of entering entire month at once
 - Caution: Days as they appear on the screen are not formatted in a day of the week (Monday to Sunday); Data entry must be specific by date.
- Compute Total Hours

Payroll

Payroll Validation Report

- Enter date range (Start date & end date)
- Select report format
 - HTML is great for onscreen report
 - PDF is great for saving to disk/emailing
- Read through the report for anomalies
 - Hours or expenses out of range
 - Odd hourly rates or location codes
 - Tip: *Let MilestoneReports analyze it for you!*

Export to ADP

- Verify the data before exporting
 - Run the *Payroll Validation* Report
- Enter date range
- Format is Comma Separated Value (CSV)
 - First row contains headings
- Currently a manager only function
- ADP Adjustment
 - “Smart” PDF document for making adjustments

Lists and Reports

Lists and Reports

- Clients
- Cases
- Funding Sources
- Work Order
- Payroll
- Management
- *Others? Need a custom report, let us know*

Report Formats

- Adobe Acrobat (*.PDF)
 - Best for printing, saving, and emailing
 - Requires Adobe Acrobat to read
- Excel (*.XLS)
 - Best for integrating data with existing spreadsheets
- HTML (*.HTM)
 - Best for a quick peek at a list or report
- Rich Text (*.RTF)
 - Opens in Microsoft Word
- Text (*.TXT)
- TIFF (*.TIF)
 - The ultimate in read-only because it's a graphic image

Saving Historical Lists/Reports

- Save PDF files with today's date in filename
- Examples:
 - Clients_2007_07_15.pdf (*recommended format*)
 - Payroll_2007_Nov_7.pdf
 - Cases_Aug152007.pdf
- Allows you to save “snapshots” of your data
- Do your own backups – so to speak

How To's

Step by step procedures for some of the common activities in MilestoneReports.com

How To Add a New Client

- First, verify that the client **doesn't** exist
 - Check by name and SSN
 - Check the inactive list (it may have been a few years)
- Add the new client
 - Provide as much information as possible
- Next steps
 - Create a case (and possibly an authorization)
 - Time entry

How To Start a New Case

- Lookup client by name or number
- Select the Revenue Type (this is essential!)
 - Slot/Contract or Fee for Service
- Provide any option personal information
- At least one impairment is required
- Select a funding source (if fee for service)
 - Or at least an address for the reports
- Select one or more trustees
 - If you don't, then only managers can access the case

How To Close a Case

- Lookup client by name or number
- Select the case you want to edit
 - Specify the end date
 - Specify closure date and reason
 - Specify any additional comments
- You don't have to Inactivate it

How To Create an Authorization

- Lookup client by name or number
- Select case (if more than one)
- Specify start and end dates
- Specify hours and/or expense
 - One is required
- Verify the billing rate
 - Default value comes from your company profile

How To Close an Authorization

- Lookup client by name or number
- Select case and authorization
- Go to the Closure tab
 - Specify closure date and reason
- Add any additional comments
 - Comments tab
- You don't have to Inactivate it

How To Add a Timecard

- Select Client and Case
 - Authorization is also required, if fee for service
- If it's an *Authorization* timecard
 - Enter employee, date, hours, expense, mileage
- If it's a *Production* timecard
 - Select location, job step, units or hours, rates
- If it's an *Hourly* timecard
 - Select location, task, hours
- Add as much detail as possible
 - Comments and task descriptions

How To Upload Payroll

- Generate the Payroll Validation Report
 - Study it, looking for anomalies
 - Consider any of the provided analysis
 - Make any necessary corrections to timecards
 - Repeat until perfect
- Have the manager Export to ADP
 - Ensure the same date range as above report
 - Generates a CSV file that you can email
 - Better yet, let “them” export it themselves!

How To Add a New Employee

- Specify number, name, SSN, phone
 - Many other fields are optional
 - SSN can be any 4+ digit code
 - Tip: Emails should be unique for all employees
- If they are going to be a system user
 - Select Role on the Employee tab
 - Enter ID and Password on the User tab

How To Inactivate a User

- If an employee leaves the company
 - Inactivate them
 - Blank out their ID and Password
 - Add appropriate comments
- If you want to prevent an employee/user from accessing MilestoneReports.com
 - Blank out their ID and Password
 - Add appropriate comments
- Managers can quickly scan the *Access?* column on the management screen to see who can sign-in

Final Thoughts

It may take some time ...

- We realize a few things
 - Change is not easy
 - You're comfortable with your current process
- In the short term
 - Try to let go of your existing concepts, terms, and processes
 - Let the Milestone system take control
 - Learn to trust it

But, in the long run ...

- You will have the same vision we do
 - You can work from anywhere
 - You won't have to enter data twice
 - You can stop mailing, faxing, and emailing data to other employees
 - They can sign-in and look it up for themselves!
 - You may have suggestions for making it better!
 - We wish to grow MilestoneReports.com to fit all of your needs

Any Questions?

- Functional questions?
info@milestonereports.com
- Technical questions?
support@milestonereports.com
- Web site
www.milestonereports.com
– Documents, Tours, FAQs