

DCI Reports Cheat Sheet v1.0

I want to know...	There's a report for that!	I can find it under...	Can also be found for single items on...
How many hours were worked in my cost center or by an employee	Punch Entries Report	COA Reports	Cost Center/Employee Details Page>Entries Tab
Who needs to verify punches	Punch Entries Report	COA Reports	Cost Center Details Page>Entries Tab
If I still have pending punches to approve	Punch Entries Report	COA Reports	Pending Entries Tab
When staff entered punches	Punch Entry Details Report Late Entry Report	COA Reports Management Reports	Punch Details Page
Who has service accounts for my cost center	Service Accounts Report	COA Reports	Cost Center Details Page>Accounts Tab
If clients have signed off on punches	Punch Entries Report	COA Reports	Punch Details Page
What punches did I approve before client sign-off	Client Approval Bypassed Punch Entry Report	Management Reports	Punch Details Page
Who approved punches and when they were approved	Punch Entry Details Report	COA Reports	Punch Details Page
Who has overtime	Punch Entry Overtime Report	Management Reports	Employee Details Page>Entries Tab
What authorizations we have over provided on	Punch Entry Over Authorization Report	Management Reports	N/A
If we're on track to provide all authorized hours by the end of the authorization	Authorization Run Rate Report	Authorization Reports	N/A
If my clients have active authorizations	Authorization Entries Report	Authorization Reports	Client Details Page>Entries Tab
If any authorizations are expiring soon	Expiring Authorizations Report	Authorization Reports	N/A
How many hours we have punched against an authorization	Authorization Transactions Report	Authorization Reports	Client Details Page>Accounts Tab
What clients are assigned to my cost center	Client Report	Client Report	Cost Center Details Page>Profiles Tab
What employees are assigned to my cost center	Employee Report	Employee Report	Cost Center Details Page>Profiles Tab

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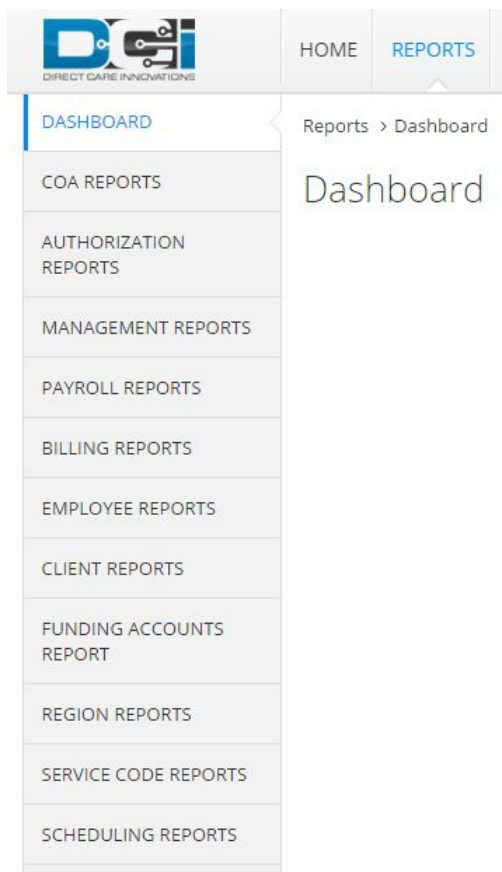
What employees are missing an employee number	Employee Report	Employee Report	Employee Details Page
When a client was absent from the program	Residential Absentee Report Parenting Absentee Report	COA Reports	Residential/Parenting Program Details Page>Entries Tab
If attendance was generated for the program	Residential Attendance Report Parenting Attendance Report	COA Reports	Residential/Parenting Program Details Page>Entries Tab
When a client attended a day program	Day Attendance Report	COA Reports	Day Program Details Page>Entries Tab
How many hours an employee was paid out	Punch Entries Report Payroll Batch Details Report	COA Reports Payroll Reports	Employee Details Page>Entries Tab
What was billed for a client	Billing Batch Details Report	Billing Reports	Client Details Page>Entries Tab

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To run any report:

1. Sign in to your Personal Profile
2. Click the "Reports" tab at the top of the page
3. Hover over any of the sidebar tabs to see the reports in that tab (i.e. Hover over COA Reports to see: Punch Entries Report, Punch Entry Details Report, Punch Entry Notes Report, Service Accounts Report, Residential Attendance Report, Residential Absentee Report, Parenting Attendance Report, Parenting Absentee Report, or Day Attendance Report)
4. Click the report you want to run
5. Enter desired criteria into the filters (i.e. filter by time frame, specific client, employee, service code, cost center, etc.)
6. Click "Search"
7. The records will display in the table below the filters

All reports can be downloaded as a CSV or PDF by clicking the "Download to CSV" or "Download to PDF" buttons.



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Report	Purpose	Filters	Data	Why	Who	When
Punch Entries	View punches made in the system	<ul style="list-style-type: none"> · Start Date · End Date · Employee · Client · Cost Center · Service Code · Account Type · Status 	<ul style="list-style-type: none"> · Punch ID · Date of Service · Account Type · Employee Name · Employee Number · Client/Residential/Day program name · Account Reference · Cost Center · Service Code · Start Date and Time · End Date and Time · Amount · Client Sign-Off · Status 	<ul style="list-style-type: none"> · How many hours were worked: <ul style="list-style-type: none"> · Near OT · Compare to allocated hours · Annual bonus determination · PT/FT status · Status of punches: <ul style="list-style-type: none"> · Pending · Unverified · Open · Check client sign-off 	<ul style="list-style-type: none"> · Frontline Managers · AD/Directors · HR · Payroll 	<ul style="list-style-type: none"> · On-Going · End of week · Near end of Pay Period · Prior to Processing Payroll Batch

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<p>Punch Entry Details</p>	<p>View who created the punch and when, as well as who approved/rejected the punch and when</p>	<ul style="list-style-type: none"> · Start Date · End Date · Employee · Client · Cost Center · Service Code · Account Type · Status 	<ul style="list-style-type: none"> · Punch ID · Reference Punch ID · Date of Service · Account Type · Employee Name · Employee Number · Client/Residential/Day program name · Account Reference · Cost Center · Service Code · Start Date and Time · End Date and Time · Amount · Billable amount · Client Sign-Off · Status · Created By · Created Date · Approved/Rejected By · Approved/Rejected Date · IP Address 	<ul style="list-style-type: none"> · Who is creating punches (employee vs. supervisor) · When punch review is being completed by supervisors · Punches entered/approved after payroll is pulled · Punches rejected by clients 	<ul style="list-style-type: none"> · AD/Directors · Administrative Support · Help Center Team 	<ul style="list-style-type: none"> · On-Going · End of week · Near end of Pay Period
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Punch Entry Notes	View notes associated with punches	<ul style="list-style-type: none"> · Start Date · End Date · Employee · Client · Cost Center · Service Code · Account Type · Status 	<ul style="list-style-type: none"> · Punch ID · Date of Service · Account Type · Employee Name · Employee Number · Client/Residential/Day program name · Cost Center · Service Code · Start Date and Time · End Date and Time · Statements · Canned Statements 	<ul style="list-style-type: none"> · Review progress notes (if entered) · Review reasons for training, mileage, etc. 	<ul style="list-style-type: none"> · Frontline Managers · AD/Directors 	<ul style="list-style-type: none"> · On-Going · End of Month
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Service Accounts	View all service accounts in system	<ul style="list-style-type: none"> · Profile Type · Employee/Client/Residential Program/Day Program · Cost Center · Service Code · Account Type 	<ul style="list-style-type: none"> · Account Type · Account ID · Employee/Residential/Day Program Name · Employee Number/Client ID · Cost Center · Pay Rate · Service Code · Client/Residential/Day Program Name 	<ul style="list-style-type: none"> · Verify that service accounts are set up correctly · Check that all needed service accounts are created · Troubleshoot when an employee cannot enter a punch 	<ul style="list-style-type: none"> · Frontline Managers · AD/Directors · Administrative support · Help Desk Team 	<ul style="list-style-type: none"> · As needed · Routine QA checks
Residential Attendance	Shows each day clients were present at the residential program	<ul style="list-style-type: none"> · Start Date · End Date · Residential Name · Cost Center · Client 	<ul style="list-style-type: none"> · Client Last Name · Client First Name · Account Reference · Start Date · End Date · Number of Days · Residential Name 	<ul style="list-style-type: none"> · Verify that attendance has been generated · Verify correct attendance 	AD/Directors	<ul style="list-style-type: none"> · As needed · End of month · Prior to billing

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Residential Absentee	Shows each day clients were absent from the residential program	<ul style="list-style-type: none"> · Start Date · End Date · Residential Name · Cost Center · Client 	<ul style="list-style-type: none"> · Client Last Name · Client First Name · Account Reference · Start Date · End Date · Number of Days · Residential Name · Reason · Notes 	<ul style="list-style-type: none"> · Verify that attendance has been generated · Verify correct absences 	AD/Directors	<ul style="list-style-type: none"> · As needed · End of month · Prior to billing
Parenting Attendance	Shows each day client were present at the parenting program	<ul style="list-style-type: none"> · Start Date · End Date · Parenting Name · Cost Center · Client 	<ul style="list-style-type: none"> · Client Last Name · Client First Name · Account Reference · Start Date · End Date · Number of Days · Parenting Name 	<ul style="list-style-type: none"> · Verify that attendance has been generated · Verify correct attendance 	AD/Directors	<ul style="list-style-type: none"> · As needed · End of month · Prior to billing batches processing

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<p>Parenting Absentee</p>	<p>Shows each day clients were absent from the parenting program</p>	<ul style="list-style-type: none"> · Start Date · End Date · Parenting Name · Cost Center · Client 	<ul style="list-style-type: none"> · Client Last Name · Client First Name · Account Reference · Start Date · End Date · Number of Days · Parenting Name · Reason · Notes 	<ul style="list-style-type: none"> · Verify that attendance has been generated · Verify correct absences 	<p>AD/Directors</p>	<ul style="list-style-type: none"> · As needed · End of month · Prior to billing
<p>Day Attendance</p>	<p>Shows each day and the hours clients were present at the day program</p>	<ul style="list-style-type: none"> · Start Date · End Date · Day Program Name · Cost Center · Client 	<ul style="list-style-type: none"> · Client Last Name · Client First Name · Account Reference · Start Date · End Date · Number of Hours · Day Program Name 	<ul style="list-style-type: none"> · Verify that attendance has been approved · Verify correct attendance 	<p>AD/Directors</p>	<ul style="list-style-type: none"> · As needed · End of month · Prior to billing