

# Employee Renewal Tracking

*Prepared for*

**myUnity Essentials Financial**



**Netsmart**

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## Overview

Renewal Tracking allows for setup and reporting on employees (or doctors) whose licenses or certifications are due to expire.

## Create Renewal Types

Renewal Types can be created for each certification or license you want to track for employees.

Go to **File > File Maintenance > Category**. Click **Change Type** and set to **Renewal Type**.

Press the **Add** button. Enter a unique **Code** (up to 12 alphanumeric, but shorter is recommended) and **Description** and **Save** when done.

Press **Print** to view a list of Renewal Types if desired.

## Add Employee Renewals

Employee certifications and licensures are added in the Employee record in the Billing Module.

Go to **File > File Maintenance > Entity**, press **Change Type** and set to **Employee**.

Click on the **Find** button to search for and select the employee or enter the employee code in the Code field if known.

Entity Maintenance: Employee 90064 - Beck, Becky: Browse

Name/Address | Renewal | Pay-Rate | Other-Info | Contact | Notes

Code: 90064 Active:

Change Type

Entity Type:

- Contact
- Doctor
- Emergency
- Employee
- Family
- Insurance
- Ins\_Plan
- Institute
- OASIS Agency
- Referral
- Unit
- Vendor

First Name: Becky

Middle Name:

Last Name: Beck

Prefix: Suffix: RN

Suite/Apt #:

Street: 5556 Jefferson Ave

City: Garfield

State: NJ Zip Code: 00874 5000

Full Name: Beck, Becky

Find Save Cancel Print Add Delete Time Help

Click on the **Renewal** tab and click the **+Add** button to add a new row. Enter the Renewal Types along with any licensing information and the Start/End dates of each. Employee Hire and Birth Dates can also be tracked here.

Entity Maintenance: Employee 90064 - Beck, Becky - Browse

Name/Address | Renewal | Pay-Rate | Other-Info | Contact | Notes

Renewal-Type	License-No	Start-Date	End-Date
Nursing License		4/30/2016	4/30/2017
CPR		1/4/2017	1/4/2017

Note:

Find Save Cancel Print Add Delete Time Help

## Employee Renewal Report

The Renewal Report provides a list of employees or doctors whose licenses or certifications are due to expire.

Go to **File > File Lists > Entity > Renewal Reporting**.

**Report Type:** Select Employee or Doctor

**Selection Type:** Select All Records or Specific Records (use “Specific Includes” tab to make selections).

**Active Only:** Check this box to include only active employees or doctors.

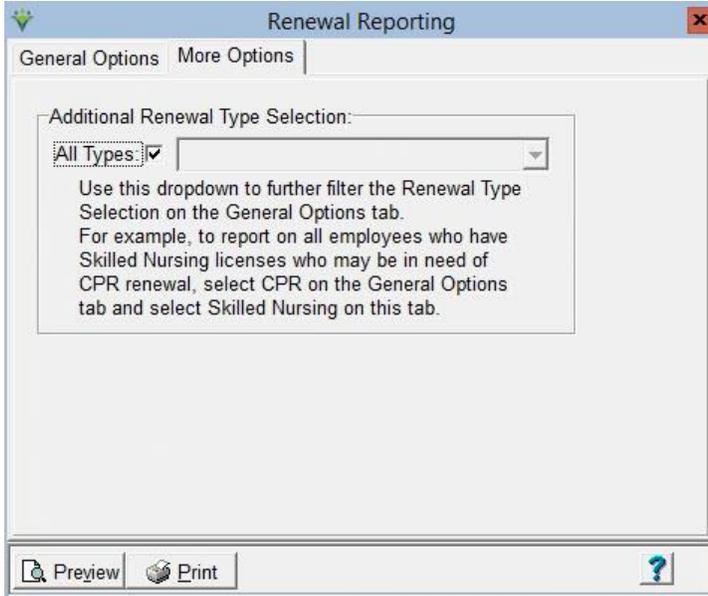
**Date Selection:** Select the date range for evaluation.

**Evaluate:** Select Start Date to see employee or doctor licenses/certifications that start in the date selection range. Select End Date to see licenses/certifications that end in the date selection range.

**Renewal Type Selection:** Un-Check “All Types” to use dropdown to select an individual Renewal Type.

**Unit Selection:** Un-check to choose a specific Unit to limit the report to only employees assigned to that unit.

More Options Tab:



Sample report:

4/7/2021 9:08:44 AM

### Renewal Reporting

Employee Page 1

All Records End-Dates From: 1/1/2021 To: 4/30/2021

Home Health Care Services

Renewal-Type	Start-Date	End-Date	License-Number	Note
Alex, Darla CPR	<a href="mailto:Alex@email.com">Alex@email.com</a> 4/7/2019	4/7/2021		
Beck, Becky CPR	1/4/2017	1/4/2021		
Nursing License	4/30/2016	4/30/2021		
Biehler, Bonnie CPR	1/1/2017	1/1/2021		