# **Employee Renewal Tracking**

Prepared for

#### myUnity Essentials Financial



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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.

👻 Category Maintenance: Renewal Ty	ype - Browse 📃 🗖 🗙				
Category					
Code: CPR  Active:  Code: CPR	Category Type: C Acuity C PayRate Type C County C Priority C Denial Reason C Program C Diagnosis Grp C Race C Disch Reason C Referral Type C Disch Condition C Religion C Document Type C Renewal Type				
চ্লেই Change Type	C Insurance Class C Revenue Code C Insurance Type C Schedule Group C Language C Schedule Match C Level Of Care C Schedule Zone C Marital Status C Team Group C Municipality C Unmade Visit C Optional C Work Shift C Payment Type				
👬 <u>Find</u> 🖳 <u>Save</u> 🗶 <u>Cancel</u> 🎯 <u>Print</u> + <u>A</u> dd - <u>D</u> elete					

#### 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: Brow	se 🗕 🗖 🗙
Name/Address	Renewal Pay-Rate Other-Info Contact Notes	
Code:	90064 • Active: 🔽	r <del>∋</del> EChange <u>T</u> ype
First Name:	Becky	Entity Type:
Middle Name:		C Contact C Doctor
Last Name:	Beck	C Emergency
Prefix:	Suffix: RN	C Family C Insurance
Suite/Apt #:		C Ins_Plan
Street:	5556 Jefferson Ave	C Institute
City:	Garfield	C Referral
State:	NJ 🔽 Zip Code: 00874 5000	C Vendor
Full Name:	Beck, Becky	
<b>H</b> ind E	Save X Cancel Print + Add - Delete	🕝 Time

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.

<b>*</b>	Entity Maintena	ance: Employee 90064	- Beck, E	ecky - Browse	×
Name/Address	Renewal Pay-R	ate Other-Info Contact	Notes		
Renewal-Type		License-No	Start-Date	End-Date	<b>▲</b>
Nursing License	,		4/30/2016	4/30/2017	
CPR			1/4/2017	1/4/2017	
					1
I					<b>_</b>
Note:					
H Eind [	Save X Car	ncel 🞯 <u>P</u> rint 🕂 <u>A</u>	dd – <u>D</u> elei	te	🕝 Time

#### **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.

	Renewal Reporting		
eneral Options	More Options		
Report Type: C Employee	Selection Type: C All Records C Specific Records	☑ Active Only	
Date Selection: From: 1/1/2021	▼ To: 4/30/2021 ▼	Evaluate: C Start Date C End Date	
Renewal Type S	Selection	-	
Unit Selection: All Units: 🔽 🗍			
Pre <u>v</u> iew	2rint	?	

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:



Ÿ	Renewal Reporting
Ger	neral Options More Options
	Additional Renewal Type Selection: All Types: Use this dropdown to further filter the Renewal Type Selection on the General Options tab. For example, to report on all employees who have Skilled Nursing licenses who may be in need of CPR renewal, select CPR on the General Options tab and select Skilled Nursing on this tab.
D	Provinue de Drint
<u> </u>	Preview Print

#### Sample report:

4/7/2021 9:08:44 AM	Renewal Reporting All Records End-Dates From:1/1/2021 To:4/30/2021			mployee Iome Health Care	Page 1 e Services
Renewal-Type	Start-Date	End-Date	License-Numb	er Note	
Alex, Darla	Alex@email.c	com			
CPR	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			

