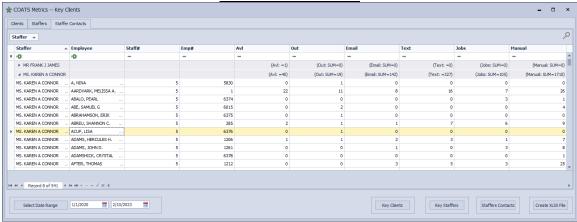
KPI - Staffer Contacts



SITUATION: The agency would like to see a Dashboard of activity by Staffer including any contact made to an employee.

STEPS:

- I. Give user(s) access to KPI Reports.
 - 1. Open COATS
 - 2. Click Maintenance
 - 3. Click Branches
 - 4. Click Users
 - 5. Find User
 - 6. Click Edit Security Profile
 - 7. Click Reports
 - 8. Check KPI Reports.
 - 9. Repeat for each user.
- II. Pulling the data from Staffers based on all employee contacts by date range.
 - 1. Open COATS.
 - 2. Click Reports.
 - 3. Click KPI Reports.
 - 4. Click KPI Staffer Contacts.
 - 5. Click Staffer Contacts tab.
 - 6. Click **Select Date Range** to select desired date range.
 - 7. Click Staffers Contacts.
 - 8. This data is pulled by the **STAFFER** attached to the assignment in the Employee Master Record. Depending on the date range and user view, the following data will appear. The totals will show by Staffer, the user can click the arrow to drill down into each Staffer.

Below each column is defined.

Staffer - Name of Staffer

Employee - Name of Employee Contacted

Staff# - Staffer Id #

Emp# - Employee ID #

AvI - # of Availability comments added for that employee by the staffer.

OUt - # of Call-Out comments added for that employee by the staffer.

Email – # of Emails sent to that employee by the staffer.

Text – # of Texts sent to that employee by the staffer.

Jobs – # of Job comments added for that employee by the staffer. These are the job status changes under the Order when modifying the job status; i.e, CON, ACC, INT, PEN, LPM, RCAL, REJ, CREJ, NSNC, FIN, NER, T/H, and D/H.

Manual - # of manual comments added via Add Comment for that employee by the staffer