

## Adding or Editing Metric Goals

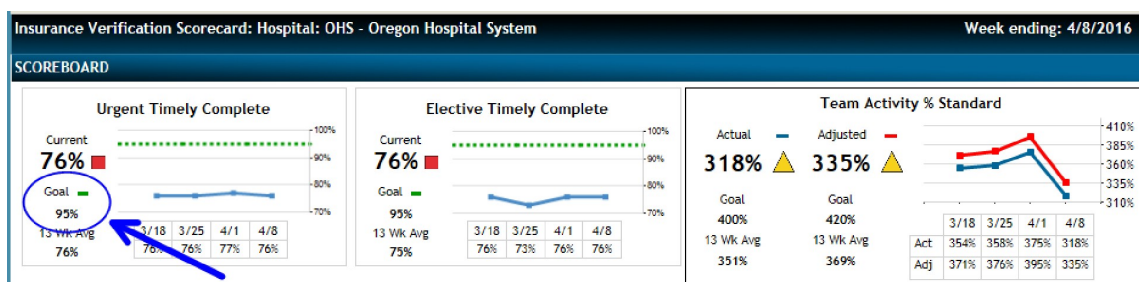
You can track organizational progress against goals for certain metrics that are displayed on dashboards or scorecards. Use the Goals page to add or edit goals for these metrics. You can configure the scope and effective dates of these goals. The scope may be set at the hierarchy, facility, or team level depending on the type of reporting object i.e., dashboard or scorecard) that displays the goal.

The Goals page is not used for goals associated with individual representative performance (See [Adding or Editing Representative Goals](#)).

In the Configuration Center, click **Add/Edit Goals** in the task pane to open the Goals page.

To enter a goal for a particular metric, you need to specify the report object elements that apply to it. See [Goal Metric Names](#) to determine how the labeling on the report object maps to the selections on the Goals page.

For example: timely complete goals on the scoreboard at the top of the Insurance Verification Scorecard.



Use the Goals page to set the levels for the timely complete goals for insurance verification of the urgent and elective patient populations. You must also set the ranges that are used to show performance against the goal of the current value of the metric. In the screen shot above, the current values of 76% are sufficiently below the goals so that they are in the Alert range indicated by the red box.

**Goals**

**Identify the Report**  
Reporting Type:  Reporting Name:

**Select Metric to Modify**  
Available Metrics:  
 Avg Team Productivity % of Std - Adjusted  
 Due Diligence Complete %  
 Timely Complete - Elective %  
 Timely Complete - Urgent %

**Goal Values:**

Measure	Effective Date	Goal
Total	4/1/2016	95%

**Additional Metric Properties**  
 Instance:   
 Hierarchy:   
 Facility:   
 IsUrgent:

## Using the Goals Page

In the Configuration Center, click **Add/Edit Goals** in the task pane to open the Goals page.

Choose a reporting object, and then enter or change the goal values for the metrics and measures you want to track for your organization on the selected dashboard or scorecard.

**Goals**

**Identify the Report**  
 Reporting Type:  Reporting Name:

**Select Metric to Modify**  
 Available Metrics

**Goal Values:**

Measure	Effective Date	Goal

**Additional Metric Properties**

## Identify the Report

Use this section to select the reporting object that contains metrics that have goals.

**Identify the Report**  
 Reporting Type:  Reporting Name:

**Reporting Type** - the reporting types that can have goals (i.e., dashboard or scorecard).

Source: ReportingDW.dbo.DisplayObjectType.ObjectType

**Reporting Name** - the names of report objects from the selected reporting type that can have goals.

Note: Choose RC Scorecard to enter goals for the following reports:

- o RC Trending Financial Overview
- o RC Trending Operational Overview - PA
- o RC Trending Operational Overview - PFS

Source: ReportingDW.dbo.DisplayObject.ObjectName

Click **Search** to find the metrics that have goals that you can configure on the selected report object.

- ☐ Clears all fields in sections below
- ☐ Populates Available Metrics list

Click **Clear** to clear all fields on the page.

## Select Metric to Modify

**Available Metrics** - lists the metrics from the selected report object that can have goals associated with them. Some goals may not be used (as an implementation option).

**Select Metric to Modify**  
 Available Metrics

Avg Team Productivity % of Std - Adjusted
Due Diligence Complete %
Timely Complete - Elective %
Timely Complete - Urgent %

Selecting a metric populates Additional Metric Properties fields below. This list excludes any metrics associated with team or representative productivity. These goals are managed on the Rep Goals page. See [Adding or Editing Representative Goals](#).

**Important:** Sometimes the metric, field, and value names in this section do not match their associated element labels on the report object. You should have the contextual knowledge about data and methodology to determine the associations and set the properties and goal values for this metric. See [Goal Metric Names](#).

## Additional Metric Properties

After you have selected an available metric, this section is populated with its properties (parameters). There are fixed and dynamic properties: fixed properties are the same across all metrics; dynamic properties differ depending on the selected metric.

**Additional Metric Properties**

Instance:

Hierarchy:

Facility:

Team:

ActionItemType:

IsUrgent:

## Fixed Metric Properties

The **Instance**, **Hierarchy**, and **Facility** fields are fixed properties for all available metrics. The remaining fields below these are the dynamic metric properties.

**Instance**—select from different instances of the selected report object using this metric. E.g., there may be multiple Daily IV dashboards for an organization with multiple IV teams.

Source: ReportingDW.dbo.DisplayObjectInstance.InstanceName

**Hierarchy**—select the reporting hierarchy that has the relevant facility. E.g., Hospital, Front End, Back End, etc.

**Facility**—select a facility from the selected hierarchy. Facility hierarchy levels are displayed using dashes to indicate levels and parent relationships.

If **Apply To All** is selected, any goals created/modified are applied to all facilities in the hierarchy.

**ALL** may be a selection for some metric properties depending on configuration. It acts like a virtual parent of all the other selections. This is a goal for the total sum of all the other selections applicable for the selected facility. It is not a sum of all the goals of the individual items, and does not affect any goals at the individual item level.

For example: selecting ALL for Responsibility sets a goal for the sum of the metric values for the four responsibilities for the East Region facility.

**Additional Metric Properties**

Instance:

Hierarchy:

Facility:

Responsibility:

- Admitting
- ALL
- Care Management
- External Entities
- Financial & Medicaid Svc

## Dynamic Metric Properties

The remaining fields are additional parameters relevant only to the selected metric. These fields specify the dimensions for the metric selected.

This area may include fields such as team, action item type, status, priority, etc.

Additional Metric Properties	What to Enter
Action Item Type	Select the action item type for which the goals apply; generally the same as the team.
Is Urgent	Select No if entering Elective goals. Select Yes if entering Urgent goals
Major Patient Type	Generally Inpatient or Outpatient
Outcome Type	Select Positive, Negative, or Neutral depending on the goal you are entering.
Payer Type	Select Commercial, Government, Self, or Other depending on the goal you are entering.
Responsibility	Appears in the Receivable Health section of the RC Scorecard. Enter the responsibility you want on the report for the goal you are entering
Task Status Category	Generally Medicaid, Charity, or Other are chosen
Team	Select the team for which you are entering goals
Transaction Category	Adjustments, Cash, Uncompensated, and Write-off are commonly entered.
Transaction Type	Appears in the Financial Outcomes section of the RC Scorecard. Generally, Charity, Adjust, Administrative, Bad Debt, are used. But other transaction types may be entered as well

## Goal Values

When you have selected the metric and its properties (dimensions), the Goal Values section populates with the measures and any active goal values and effective dates that have been entered. You can view, add, or edit the goals values, effective dates, and display options for the selected metric.

**Goals**

Identify the Report  
Reporting Type:  Reporting Name:

**Select Metric to Modify**  
Available Metrics

- Avg Team Productivity % of Std - Adjusted
- Due Diligence Complete %
- Timely Complete - Elective %
- Timely Complete - Urgent %**

**Additional Metric Properties**  
Instance:   
Hierarchy:   
Facility:   
IsUrgent:

**Goal Values:**

Measure	Effective Date	Goal
Total	4/1/2016	95% <input type="button" value="Edit"/>

**Goal Values**—click this box to switch between showing active and future goals.


- ☐ **Active Goals**—currently in use (default setting), effective date <= SysDate
- ☐ **Future Goals**—planned replacements for active goals, effective date > SysDate

There may be multiple goals for multiple measures of a selected metric. E.g., if a metric has multiple strata. Each goal is a row in the table and consists of the Measure, Effective Date, and Goal value. Goal measures are specified by the selected metric and its properties (dimensions).

- ☐ Goals that have not been entered or are not in use have no effective date or goal value.

- ☐ The table is displayed only when all properties for the metric have been selected.
- ☐ The goal is displayed in the format that it uses in reporting.

### Editing Goal Values

Click the **Edit** button  for a goal measure to enter or edit its next value, effective date, and range values.

Report Instance:

Insurance Verification Scorecard

Metric:

Timely Complete - Urgent %

Facility:

OHS - Oregon Hospital System

Measure:

Total

Active Value:

0.95

Next Value:

Effective Date:

<M/d/yyyy>

15

Goal Type

Meeting/Exceeding

Warning

Alert

Range Values

Low Value	High Value
0.95000	1.00000
0.80000	0.94999
-99999.000	0.79999

History:

Effective Date	Goal Value
4/1/2016	0.95

Cancel

Save

- The Report Instance, Metric, Facility, Measure, and Active Value are shown as previously entered and cannot be changed here.

The display name on the scorecard or dashboard does not always match its name on the configuration drop-down list. See [Goal Metric Names](#).

- **Next Value**—goal number to be used on the effective date entered below.

The format that you enter here may be different on the report. For example, the decimal .95 displayed as 95 % in reporting. When you save your changes here, the Goal Values section displays the number in its reporting format. See [Goal Metric Names](#).

**Note:** Enter values using only the number, decimal point (.), and minus sign (-) characters, as needed. Do not enter symbols (e.g., \$, %, #, etc.) or other punctuation (e.g., commas, parentheses, quotes, etc.).

- **Effective Date**—the date that a goal becomes active.

Use today's date to change the active goal value. For scorecards, using the current date changes the goal that will appear for the next reporting period. This is because you cannot enter a goal with a date in the past and the reporting period for scorecards ends on the previous Friday. If you want a goal to be effective in the next reporting period, be sure to enter it Saturday - Thursday. Only one goal (next value) with a future effective date is supported.

- **History**—shows the goal effective dates and values from the past.

- **Range Values**—the performance associated with a reported value compared to its goal value is shown by colors and icons on a scorecard or dashboard. Enter or edit the low and high values that define the ranges used to describe the reported value of a measure.

**Note:** The restrictions noted above for Next Value also apply to this field.

For goals where a higher number indicates better performance, the range with the highest numbers is entered in the top row of text boxes (e.g., timely complete, revenue, cash, etc.):

Goal Type	Range Values	
	Low Value	High Value
Meeting/Exceeding	0.97000	1.00000
Warning	0.80000	0.96999
Alert	-99999.000	0.79999

For goals where a lower number indicates better performance, the range with the lowest numbers is entered in the top row (e.g., AR days, write-off percentage, open high priority delinquent, etc.):

Goal Type	Range Values	
	Low Value	High Value
Meeting/Exceeding	0	20
Warning	21	30
Alert	31	999999

For example, for some metrics on a scorecard, performance against goal is indicated by these icons and ranges (default settings):

- A green circle indicates that the reported value is in the range where it is **Meeting/Exceeding** its goal value.
- A yellow triangle indicates a **Warning** that the value is slightly below goal.
- A red square indicates an **Alert** that the value is significantly below goal. If any value in a callout box is in this range, it is shown in red and the box border becomes a thick red line.

For goals that display on a thermometer chart, enter the high values to five decimal places to prevent spaces between the colors on the chart:



Source database: ReportingDW, tables: GoalDisplayProperty, GoalDisplayPropertyGroup, GoalDisplayPropertyGroupDetail, GoalStatusColor, GoalStatusImage, GoalStatusText.

## Goal Metric Names

Use the following table to choose the correct metric goal from the configuration dialog. The display name on the scorecard or dashboard may not exactly match its name on the configuration drop-down list. Some goals are a percentage and need to be entered as a decimal (90% entered as 0.90) but other percentages must be entered as an integer. Some goals that typically include a decimal may be entered as an integer but displayed as a decimal, e.g. Avg Touches to Close may be entered as 2 but is displayed as 2.0.

Report	Metric Name in the Config UI	Metric Name on the Report	Enter Goal As
Collections Scorecard	Open High Priority Delinquent	Open High Priority Delinquent	Integer
	Active Work Balance	Active Insurance Collection Work	Integer
	Aging 91+ Days from Statement (% of Balance)	Aging 91+ Days from Submit (% of Balance)	Decimal
	Avg Touches To Close	Collections Avg Touches To Close	Decimal
	Insurance Cash Collections	Insurance Cash Collections	Integer
FC Scorecard	Application Approval Rate	Application Approval Rate	Decimal
	Application Approvals Balance - enter a goal for Charity, Medicaid, and Other. Goal on the scorecard is the sum of these three. Be sure the Text drop-down list matches the Task Status Category in the Additional Metric Properties.	Application Approvals	Integer
	Avg Touch to Close	Financial Counseling-Avg Touches To Close	Decimal
	Closures	Closures	Decimal
	Screenings Completed - Discharged	Screenings Completed(Last Week's Discharges)	Decimal
	Screenings Completed - In-House	Screenings Completed(Last Week's Discharges)	Decimal
	Open High Priority Delinquent	Open High Priority Delinquent	Integer
	Screenings Completed - Pre-Service	Screenings Completed (Last Week's Discharges)	Decimal
	Sponsorship Linkage Rate	Sponsorship Linkage Rate	Decimal
Insurance Verification Scorecard (New in Aeos 16.2)	Avg Team Productivity % of Std – Actual	Team Activity % Standard - Actual	Decimal
	Avg Team Productivity % of Std – Adjusted	Team Activity % Standard - Adjusted	Decimal
	Due Diligence Complete %	Due Diligence Complete	Decimal. In Additional Metric Properties, use the IsUrgent field to specify both urgent and elective values.
	Timely Complete – Elective %	Elective Timely Complete – Current	Decimal
	Timely Complete – Urgent %	Urgent Timely Complete - Current	Decimal
IV Scorecard (Obsolete in Aeos 16.3)	Average Days Out	Average Days Out	Integer Display values must be 99 or less.
	Avg Touches to Close	IV Avg Touches To Close	Decimal
	Timely Complete – Elective %	Timely Complete Elective	Decimal
	Elective Complete %	At or Post-Service - Elective Complete	Integer Do not enter display values. Select Inpatient and Outpatient for Major Patient Type.
	Friday Days Out	Friday Days Out	Integer Display values must be 99 or less.
	Open High Priority Delinquent	Open High Priority Delinquent	Integer
	Timely Complete – Urgent %	Timely Complete Urgent	Decimal



Report	Metric Name in the Config UI	Metric Name on the Report	Enter Goal As
	Urgent Complete %	At or Post-Service - Urgent complete	Integer Do not enter display values. Select Inpatient and Outpatient for Major Patient Type.
	Pre-Service: Days Out	Elective Pre-Service: Days Out	Integer Do not enter display values. Select Inpatient and Outpatient for Major Patient Type.
PR Scorecard	Average Days Out	Average Days Out	Decimal Display values must be 99 or less.
	Prior to Service Complete %	Prior to Service	Integer Do not enter display values.
	Friday Days Out	Friday Days Out	Integer Display values must be 99 or less.
	Timely Complete %	Timely Complete	Decimal Select PreReg for Action Item Type
	Pre-Service: Days Out	Pre-Service: Days Out	Integer Do not enter display values.
RC Executive Summary	AI Billing WIP	Billing Work In Process (individual lines for responsibilities)	Decimal value for Billing WIP AR Days by Responsibility
	AI Billing WIP Total	Billing Work In Process Total (for Total value only)	Decimal value for Total Billing WIP AR Days
	FC Pre-Discharge Screening Complete Rate	Financial Counseling Pre-Dischg Screen	Decimal
	FEC-Patient Liability Collected	Pt. Liab. Collected	Integer
	Ins Active Work	Ins Active Work	Integer
	Monthly Cash Performance	Monthly Cash Performance	Integer
	Open Collections	Delinquent %/Open Collections	Decimal
	SP Active Work	SP Active Work	Integer
	Sponsorship Linkage Rate	FC Linkage	Decimal
	Timely Complete - Elective %	Elective Complete	Decimal
	Timely Complete - urgent %	Urgent Complete	Decimal
	Timely Complete Percent	Pre-Reg Complete	Decimal
	Unsubmitted	Delinquent %/Unsubmitted	Decimal
	Wnte-Offs	Write-offs	Integer
RC Scorecard	Active Insurance Collection Balance	Active Insurance Collection	Integer Use the first one in the list for Collections Balance. The second one is for number of AI
	Active Insurance Collection Count	Active Insurance Collection	Integer Use the first one in the list for Collections Balance. The second one is for number of AI
	Active Insurance Collection Trend	Active Insurance Collection	Integer Use the first one in the list for Collections Balance. The second one is for number of AI
	Active Self-Pay Collections Balance	Active Self-Pay Collections	Integer. Use the first one in the list for SP Balance. The second one is for number of AI



Report	Metric Name in the Config UI	Metric Name on the Report	Enter Goal As
	Active Self-Pay Collections Count	Active Self-Pay Collections	Integer. Use the first one in the list for SP Balance. The second one is for number of AI
	Active Self-Pay Collections Trend	Active Self-Pay Collections	Integer. Use the first one in the list for SP Balance. The second one is for number of AI
	AR Aged 91+	AR Aged Receivable 91+	Integer. Use the first one in the list
	AR Aged 91+ Trend	AR Aged Receivable 91+	Integer. Use the first one in the list
	AR Days	Impactable AR Days (Receivable Health: Page 2. If Client AR Days is entered manually in the Configuration Center UI. See <a href="#">Adding or Editing Key AR Transactions</a> ).	Integer
		AR Days (Receivable Health: Page 2. if there are no manual entries; i.e., no row for Impactable AR Days below)	Integer
	*Client AR Days	AR Days (Receivable Health: Page 2. If there are manual entries; i.e., there is a row for Impactable AR Days below)	Integer
		AR Days (Scoreboard: Page 1)	Integer
	*Cash	Cash	Integer
	Cash by Payer Type Trend	Not on the scorecard. Appears on the RC Trending Financial Overview report.	
	*Cash Factor	Cash Factor	Decimal
	Credit Days	Not on the scorecard, it appears on the RC Trending Financial Overview	
	Denial Occurrence Rate	Denial Occurrence Rate	Decimal
	Elective	Not on scorecard. Appears on the RC Trending Operational Overview PA report	
	FC Pre-Discharge Screening Complete Rate	Financial Counseling Pre-Discharge Complete	Decimal
	FEC-Patient Liability Collected	Not on the scorecard, it appears on the RC Trending Financial Overview	Integer
	Financial Outcome Dollars	Dollars by Outcome	Integer
	Financial Outcome Dollars Category	Financial Outcome Dollars by Category	Integer
	Financial Outcome Percent	Percent of Revenue	Integer
	Insurance Complete Rate	Insurance Complete Rate	Decimal
	Post-Suspense Billing WIP Days by Responsibility	Post-Suspense Billing WIP Days by Responsibility	Integer
	Post-Suspense Billing WIP Dollars	Post Suspense Billing WIP	Integer

Report	Metric Name in the Config UI	Metric Name on the Report	Enter Goal As
	Pre-Registration Complete Rate	Pre-Registration Complete Rate	Decimal
	Sponsorship Linkage Rate	Not on scorecard. Appears on the RC Trending Operational Overview PA report.	
	Timely Complete – Elective %	Timely Complete – Elective	Decimal
	Timely Complete – Urgent %	Timely Complete - Urgent	Decimal
	*Total Delinquency Rate	Total Delinquency Rate	Integer
	Total Requests Trend	Not on scorecard. Appears on RC Trending Operational Overview - PFS	
	*Write-Off Percentage	Write-Off Percentage	
RC Trending Financial Overview  (Select RC Scorecard from the Reporting Name drop-down list)	Active Insurance Collection	Not on this report	
	Active Self-Pay Collections	Not on this report	
	AR Aged Receivable 91+ Trend	AR Aged 91+	Integer. Use the one with "trend" in the metric name.
	*AR Days	AR Days Note: this is set for the RC Scorecard and used on this report as well	Integer. Use the first one.
	*Cash	Total Weekly Cash Note: set for the RC Scorecard but also used in the Cash Collection Trend chart and the Total Weekly Cash Goal on this report	Integer
	Cash by Payer Type	Weekly Cash for Payer Type	Integer
	*Cash Factor	Not on this report	
	Credit Days	Total Credit Days (\$) Enter the number of days (which is then multiplied by ADR to give the dollars)	Integer
	Denial Occurrence Rate	Not on this report	
	Elective	Not on this report	
	Financial Counseling Pre-Discharge Complete	Not on this report	Decimal
	Financial Outcome Dollars	Write-Off and Adjustments	Integer
	Financial Outcome Percent	Not on this report	
	Insurance Complete Rate	Not on this report	
	Post-Suspense Billing WIP Days	Not on this report	
	Post-Suspense Billing WIP Days by Responsibility	Not on this report	
	Post-Suspense Billing WIP	Not on this report	
	Pre-Registration Complete Rate	Not on this report	
	Sponsorship Linkage Rate	Not on this report	
	*Total Delinquency Rate	Not on this report	

Report	Metric Name in the Config UI	Metric Name on the Report	Enter Goal As
	Total Requests	Not on this report	
	Urgent	Not on this report	
	*Write-Off Percentage	Not on this report	
RC Trending Operational Overview PA (Select RC Scorecard from the Reporting Name drop-down list)	Active Insurance Collection	Not on this report	
	Active Self-Pay Collections	Not on this report	
	AR Aged Receivable 91+	Not on this report	
	*AR Days	Not on this report	
	AR Days	Not on this report	
	*Cash	Not on this report	
	Cash by Payer Type	Not on this report	
	*Cash Factor	Not on this report	
	Credit Days	Not on this report	
	Denial Occurrence Rate	Not on this report	
	Timely Complete – Elective %	Timely Complete - Elective	Decimal
	FEC-Patient Liability Collected	FEC-Patient Liability Collected	Integer
	FC Pre-Discharge Screening Complete Rate	Pre-Discharge Screening Complete Rate	Decimal
	Financial Outcome Dollars	Not on this report	
	Financial Outcome Percent	Not on this report	
	Insurance Complete Rate	Not on this report	
	Post-Suspense Billing WIP	Not on this report	
	Post-Suspense Billing WIP Days by Responsibility	Not on this report	
	Pre-Registration Complete Rate	Pre-Registration Complete Rate Set for RC Scorecard as well and shared	Decimal
	Sponsorship Linkage Rate	Financial Counseling Sponsorship Linkage Rate	Decimal
	*Total Delinquency Rate	Not on this report	
	Total Requests	Not on this report	
	Timely Complete - Urgent %	Timely Complete - Urgent	Decimal
	*Write-Off Percentage	Not on this report	
RC Trending Operational Overview PFS (Select RC Scorecard from the Reporting Name drop-down list)	Active Insurance Collections Trend	Insurance Collections Active Work	Integer. Use the one with "trend" in the name.
	Active Self-Pay Collections Trend	Self-Pay Collections Active Work	Integer. Use the one with "trend" in the name.
	AR Aged Receivable 91+	Not on this report	
	*AR Days	Not on this report	
	AR Days	Not on this report	

Report	Metric Name in the Config UI	Metric Name on the Report	Enter Goal As
	*Cash	Not on this report	
	Cash by Payer Type	Not on this report	
	*Cash Factor	Not on this report	
	Credit Days	Not on this report	
	Denial Occurrence Rate	Not on this report	
	Elective	Not on this report	
	Financial Counseling Pre-Discharge Complete	Not on this report	
	Financial Outcome Dollars	Not on this report	
	Financial Outcome Percent	Not on this report	
	Insurance Complete Rate	Not on this report	
	Post-Suspense Billing WIP Days by Responsibility	Post-Suspense Billing WIP (Dollars by Individual Responsibility) System derived goal values = (Post-Suspense Billing WIP Days goal values) x (ADR values for the period for the child levels of the responsibility hierarchy).	Integer
	Post-Suspense Billing WIP Days by Responsibility	Total Billing WIP (Dollars for Top Responsibility Level) System derived goal value = (Post-Suspense Billing WIP Days goal value) x (ADR value for the period for the top level of the Responsibility hierarchy)	Integer
	Post-Suspense Billing WIP Days by Responsibility	Billing WIP Days This goal is for the top level of the Responsibility hierarchy	Integer
	Pre-Registration Complete Rate	Not on this report	
	Sponsorship Linkage Rate	Not on this report	
	*Total Delinquency Rate	Not on this report	
	Total Requests Trend	Total Requests	Integer
	Urgent	Not on this report.	
	*Write-Off Percentage	Not on this report	
SP Scorecard	Active Work Balance	Active Self Pay Work	Integer
	Aging 91+ Days from Statement (% of Balance)	Aging 91+ from Statement (% of Bal)	Integer
	Avg Touches to Close	Self-Pay Collections Average Touches to Close	Decimal
	Open High Priority Delinquent	Open High Priority Delinquent	Integer
	Self Pay Cash Collections	Self-Pay Cash Collections	Integer
TP Scorecard	Actual	Avg Team Activity as % of Standard Actual	Decimal

Report	Metric Name in the Config UI	Metric Name on the Report	Enter Goal As
	Adjusted	Avg Team Activity as % of Standard Adjusted	Decimal
	Avg Touch to Close	Team Average Touches to Close	Decimal
	Total Productivity	Do not use	
FC Dashboard	Screening at Risk Discharged	Discharged	Integer
	Screening at Risk In-house	In-house	Integer
IV Dashboard	Elective Incomplete Days from Admit	Elective Incomplete	Integer
	Urgent Incomplete Days from Admit	Urgent Incomplete	Integer

\*These metrics are for thermometer charts. Enter the high values to five decimal places to prevent any spaces between the colors on the chart.

## Setting Metric Goals

Using the IV scorecard as an example, this procedure shows how you can set reporting goals. Goals for the following reports are all found under the RC Scorecard:

- RC Trending Financial Overview
- RC Trending Operational Overview - PA
- RC Trending Operational Overview - PFS

### To set the goals for a reporting metric

1. In the Configuration Center, click **Add/Edit Goals** in the task bar.

2. Under Identify the Report, select the Reporting Type **Scorecard** and **IV Scorecard** for the Reporting Name.
3. Click **Search** to find the **Available Metrics** that you can set goals for in the identified report.
4. Click the metric in the **Available Metrics** box to display the fields under Additional Metric Properties.
5. Select values to specify the properties for the goals you want to set associated with the selected metric. (See [Additional Metric Properties](#)) for more details.

**Goals**

Identify the Report  
Reporting Type:  Reporting Name:

Select Metric to Modify  
Available Metrics  
 Avg Team Productivity % of Std - Adjusted  
 Due Diligence Complete %  
 Timely Complete - Elective %  
 Timely Complete - Urgent %

Additional Metric Properties  
 Instance:   
 Hierarchy:   
 Facility:   
 IsUrgent:

Goal Values:

Measure	Effective Date	Goal
Total	4/1/2016	95% <input type="button" value="Edit"/>

6. In the Goal Values list, select **Active Goals** or **Future Goals**.

The effective date for Active Goals is the current date. The effective date for Future Goals can be any date in the future. You cannot set a goal with an effective date in the past.

7. Click the **Edit** button  for a measure to add or edit a goal. In this example, you must enter a goal for each measure.
8. Enter the **Next Value** and the **Effective Date**. Goals that are whole numbers are entered as such. Some goals that are a percentage are entered as a decimal, (e.g. 90% is entered as 0.90). See [Goal Metric Names](#) to determine whether the goal needs to be entered as an integer or a decimal.

**Edit Goal**

Report Instance:  Goal Type:

Metric:  Range Values:

Facility:  Meeting/Exceeding:

Measure:  Warning:

Active Value:  Alert:

Next Value:

Effective Date:

History:

Effective Date	Goal Value
4/1/2016	0.95

Enter the range values so that there is no gap in the range.

In this example, values greater than or equal to goal indicate better performance. Therefore, the High Value is a number higher than the actual goal.

9. Click **Save**.

## Adding or Editing Representative Goals

In the Aeos application, you can add or edit representatives' productivity goals. There are two goals that the system maintains for each representative:

- A **Standard Goal** is the number of action items expected to be worked by a full time representative during the week.
- An **Adjusted goal** is the number of action items expected to be worked during a full week prorated to the availability of that representative. So a representative who works half time has an adjusted goal that is half the standard goal.

These goals are organized by representatives' primary teams.

**Rep Goals** Refresh

**Select a Team:**

Commercial Follow-up  
Financial Counseling  
FE Collection  
Industrial Follow-up  
Insurance Verification  
Medicare Follow-up  
Medicaid Follow-up  
Managed Care Follow-up  
Pre-Registration 1  
Pre-Registration 2  
Request Billing  
Self pay Follow-up  
SP Collection  
Triage

**Assign Weekly Goals**

Representative	Std. Goal	Adj. Goal	
Lname0, Fname0	80.00000	72.00000	
Lname1, Fname1	53.00000	47.00000	
Lname2, Fname2	52.00000	46.00000	
Lname3, Fname3	50.00000	45.00000	
Lname4, Fname4	49.00000	44.00000	
Lname5, Fname5	51.00000	45.00000	
Lname6, Fname6	54.00000	48.00000	
Lname7, Fname7	47.00000	42.00000	
Lname8, Fname8	45.00000	40.00000	
Lname9, Fname9	56.00000	50.00000	

### To add or edit a representative's goals

1. In the Configuration Center, click **Add/Edit Rep Goals** in the task bar.
2. Click the representative's primary team name in the **Select a Team** list.
3. Click the **Edit** button for the representative to open the Edit Rep Goal dialog box.