

## Palco Connect Utilization Report

For instructions on how to view and download this report, please see the Palco Connect Reports Feature instructions found on our website at [www.palcofirst.com](http://www.palcofirst.com).

### What is the Utilization report?

The utilization report aids individuals in managing their allotted units and funds. It will display the total dollars and units authorized for each service, the dollars and units that have been used, and the balances remaining.

### Report Layout

**REPORTS**

Utilization

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**UTILIZATION**

Program: PA\_ODP Participant: *My Name*

Start Date: 09/16/2018

End Date: 06/30/2019

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SERVICE CODE	START DATE	END DATE	AUTHORIZED UNITS	UNIT TYPE	PAID UNITS	GOOD TO PAY UNITS	REMAINING UNITS	AUTHORIZED DOLLARS	PAID DOLLARS	GOOD TO PAY DOLLARS	BALANCE
W9798 Respite Day	9/16/2018		27.00	Day	1.00	0.00	26.00	\$5,346.00	\$273.78	\$0.00	\$5,072.22
W1726 Companion Services	9/16/2018		7,034.00	15-minute	1,312.00	0.00	5,722.00	\$24,017.52	\$4,464.99	\$0.00	\$19,552.53
W7060 In Home Community Supports 1:1	9/16/2018		2,016.00	15-minute	336.00	0.00	1,680.00	\$8,205.12	\$1,837.72	\$0.00	\$6,367.40
W7271 Transportation Mile	2/01/2019		1,250.00	Units	0.00	0.00	1,250.00	\$681.25	\$0.00	\$0.00	\$681.25

### What fields does this report include?

1. **Service Code** – The service code and description.
2. **Start and End Date** – Shows the beginning and ending date for each service.
3. **Authorized Units** – Shows the total authorized units for each service.
4. **Unit Type** – Describes the unit type.
5. **Paid Units** – Shows the number of units used for each service.
6. **Remaining Units** – Shows the number of units remaining for each service.
7. **Authorized Dollars** – Show the total authorized dollars for each service.
8. **Paid Dollars** – Shows the total dollar amount spent for each service authorization.
9. **Balance** – Shows the total dollar remaining in each service authorization.
10. **Good to Pay Units** – Shows the units of timesheets or vendor payments in “Approved for Payment” status.
11. **Good to Pay Dollars** – Shows the dollar amount of timesheets or vendor payments in “Approved for Payment” status.

### What date range should I choose?

In order to pull results from the report tool you'll need to make sure you select the correct date range. The utilization report will display information for any service authorization with a start or end date between the start and end date you select. We recommend you to use the start and end date of the Fiscal Year (Examples: Fiscal Year: 09/16/2018 – 06/30/2019; 07/01/2019 – 06/30/2020; Etc.)

### For example:

During the fiscal year of 2018-2019; a participant has two Service Authorization, one with an effective date of 09/16/2018 and another one with an effective date of 02/01/2019.

- If the date range selected is 09/16/2018 – 06/30/2019, the system will display the utilization report for both Service Authorization.

SERVICE CODE	START DATE	END DATE	AUTHORIZED UNITS	UNIT TYPE	PAID UNITS	GOOD TO PAY UNITS	REMAINING UNITS	AUTHORIZED DOLLARS	UTILIZED AMOUNT	GOOD TO PAY DOLLARS	BALAN
W9798 Respite Day	9/16/2018		27.00	Day	1.00	0.00	26.00	5,346.00	273.78	0.00	5.07
W1726 Companion Services	9/16/2018		7,034.00	15-minute	1,312.00	0.00	5,722.00	24,017.52	4,464.99	0.00	19.55
W7060 In Home Community Supports 1:1	9/16/2018		2,016.00	15-minute	336.00	0.00	1,680.00	8,205.12	1,837.72	0.00	6.36
W7271 Transportation Mile	2/01/2019		1,250.00	Units	0.00	0.00	1,250.00	681.25	0.00	0.00	68

- If the date range selected is 01/02/2019 – 06/30/2019, the system will display the utilization report for the Service Authorization dated 02/01/2019.

SERVICE CODE	START DATE	END DATE	AUTHORIZED UNITS	UNIT TYPE	PAID UNITS	GOOD TO PAY UNITS	REMAINING UNITS	AUTHORIZED DOLLARS	PAID DOLLARS	GOOD TO PAY DOLLARS	BALANCE
W7271 Transportation Mile	2/01/2019		1,250.00	Units	0.00	0.00	1,250.00	\$681.25	\$0.00	\$0.00	\$681.25

### No Results Shown

If there are no service authorizations within the date range you select, a “No Results” message will appear above the Run Report button.