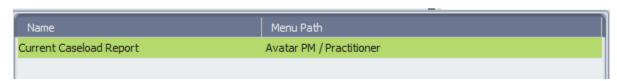# Current Caseload Report

In Avatar LIVE browse for report: Avatar PM/Practitioner/Current Caseload Report.

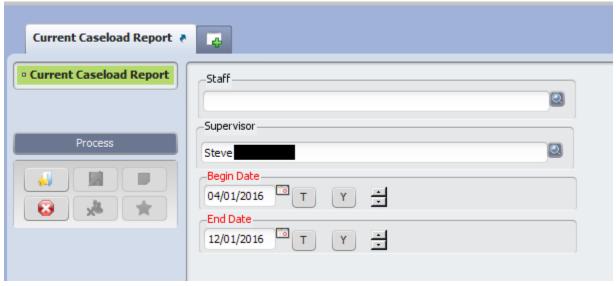| Name | Menu Path |
|------|-----------|
| Current Caseload Report | Avatar PM / Practitioner |

The 'Current Caseload Report' shows the information about all clients  assigned/removed to/from the practitioner's caseload during the period of time defined by 'Begin Date' and 'End Date' parameters.

- The client's  information (name, DOB, address, phone number, MedCal ID#, assigned/removal dates);
- Most recent treatment plan;
- Most recent assessments (CANS ANSA, Risk Assesment, Psychosocial, Mental Status) dates and status ;
- All active/open/closed episodes in the period of time defined by 'Begin Date' and 'End Date';
- Assessments, related to the episode.

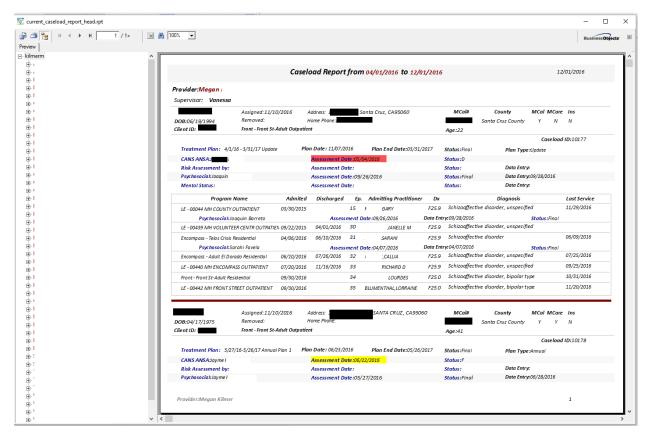Highlighted red assessments dates is a sign what the new assessment is expected.

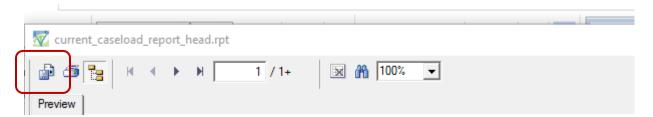Highlighted yellow assessments dates is a sign what the assessment is about to expire.



Parameters:

- Staff – practitioner, not required;
- Supervisor –supervisor, not required;
  For running the report, the one of 'Staff' or 'Supervisor' parameters need to be filled.

- Begin Date – a first day of the period;
- End Date –the last day of the period.



For exporting the report to Excel, click on the report's top left corner:



Select "Microsoft Excel" in the "Format:" drop down menu, and click "OK"