

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 Assessment, 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.

The screenshot displays the 'Current Caseload Report' interface. On the left, there is a sidebar with a 'Current Caseload Report' menu item and a 'Process' button. The main content area includes search fields for 'Staff' and 'Supervisor' (with 'Steve' entered), and date pickers for 'Begin Date' (04/01/2016) and 'End Date' (12/01/2016).

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.

Caseload Report from 04/01/2016 to 12/01/2016 12/01/2016

Provider: Megan
 Supervisor: Vanessa

Assigned: 11/10/2016 Address: Santa Cruz, CA95060 MCal# County MCal MCare Ins
 Removed: Home Phone: Santa Cruz County Y N N
 DOB: 06/19/1994 Client ID: Front - Front St-Adult Outpatient Age: 22 Case Load ID: 10177

Treatment Plan: 4/1/16 - 3/31/17 Update Plan Date: 11/07/2016 Plan End Date: 03/31/2017 Status: Final Plan Type: Update
 CANS ANSA: Assessment Date: 05/04/2016 Status: D
 Risk Assessment by: Assessment Date: Status: Data Entry:
 Psychosocial: Joaquin Assessment Date: 09/26/2016 Status: Final Data Entry: 09/28/2016
 Mental Status: Assessment Date: Status: Data Entry:

Program Name	Admitted	Discharged	Ep.	Admitting Practitioner	Dx	Diagnosis	Last Service
LE - 00044 MH COUNTY OUTPATIENT	03/30/2015		15	GARY	F25.9	Schizoaffective disorder, unspecified	11/29/2016
Psychosocial: Joaquin Barreto							
LE - 00439 MH VOLUNTEER CENTR OUTPATIENT	09/22/2015	04/01/2016	30	JANELLE M	F25.9	Schizoaffective disorder, unspecified	
Encompass - Telos Crisis Residential	04/06/2016	06/10/2016	31	SARAH	F25.9	Schizoaffective disorder	06/09/2016
Psychosocial: Sarahi Favela							
Encompass - Adult El Dorado Residential	06/10/2016	07/26/2016	32	CALLIA	F25.9	Schizoaffective disorder, unspecified	07/25/2016
LE - 00440 MH ENCOMPASS OUTPATIENT	07/20/2016	11/16/2016	33	RICHARD D	F25.9	Schizoaffective disorder, unspecified	09/25/2016
Front - Front St-Adult Residential	09/30/2016		34	LOURDES	F25.0	Schizoaffective disorder, bipolar type	10/31/2016
LE - 00442 MH FRONT STREET OUTPATIENT	09/30/2016		35	BLUMENTHAL, LORRAINE	F25.0	Schizoaffective disorder, bipolar type	11/20/2016

Assigned: 11/10/2016 Address: SANTA CRUZ, CA95060 MCal# County MCal MCare Ins
 Removed: Home Phone: Santa Cruz County Y Y N
 DOB: 04/17/1975 Client ID: Front - Front St-Adult Outpatient Age: 41 Case Load ID: 10178

Treatment Plan: 5/27/16-5/26/17 Annual Plan 1 Plan Date: 06/23/2016 Plan End Date: 05/26/2017 Status: Final Plan Type: Annual
 CANS ANSA: (Jayme) Assessment Date: 06/22/2016 Status: F
 Risk Assessment by: Assessment Date: Status: Data Entry:
 Psychosocial: (Jayme) Assessment Date: 05/27/2016 Status: Final Data Entry: 06/28/2016

Provider: Megan Kilmer 1

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

current_caseload_report_head.rpt

Format icon (red box) | 1 / 1+ | 100%

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