Santa Cruz County Behavioral Health – Highlighted Reports in Avatar

Category	Date Available	Report Name	Brief Description	Link to Documentation
Services	6/1/2016	Service Activity Report (SAR)	The report can be requested by entering a 'Start Date', and an 'End Date', by programs or by the Revenue Reporting Group (RRG). The RRG is very similar to the current CRZ 505 report, it groups multiple programs in the same categories by clinician. There are two layers to the SAR, on the first layer you can see totals per month and service code in three categories, Total (for all services) Adjusted Total (eliminates non-billables, information for the file, cancelations, etc.), and Medi-Cal (the portion of the units with Medi-Cal eligibility). The second layer of this report shows detailed information and can be accessed a month at a time and displays individual services and client names.	Service Activity Report(SAR)
Staff	8/1/2016	Current Caseload Report	The 'Current Caseload Report' shows the information about all clients who have either been assigned to or removed from a practitioner's caseload. The time period is defined within the parameters of a 'Begin Date' and an 'End Date.' • The client's information (name, DOB, address, phone number, Medi-Cal ID#, and the assigned or removal dates); • The most recent treatment plan;	Current Caseload Report

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			• The most recent assessments; (CANS or ANSA, Risk Assessment, Psychosocial, or the Mental Status assessment) and dates and status ; • All active, open, or closed episodes are defined within the parameters of a 'Begin Date' and 'End Date'; • All assessments, related to the episode.	
Services	6/1/2016	Draft Notes	The "Draft Notes" report displays the information about all Notes written that have not been submitted as 'Final'. The report can be filtered by date range and program code.	Draft Notes
Services	6/1/2016	Unposted Appointments by Staff	The "Unposted Appointments by Staff" displays the information about all appointments that have draft or missing notes. The report can be filtered by: a date range, Supervisor Staff ID and/or Practitioner Staff ID.	Unposted Appointments by Staff
Services	10/28/2016	Progress Note Aging Report	The "Progress Note Aging Report" displays: the date of a service, the scheduling calendar date (if any), date of entry, draft/final status of progress notes, note age, and the average note age by provider. The report can be filtered by: service programs, provider or supervisor within certain parameters; a 'Begin Date' and 'End Date.'	Progress Note Aging Report

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Review before billing	7/14/2016	Missing or Multiple Primary Diagnoses	The "Missing or Multiple Primary Diagnoses" report displays the information about all of the missing or multiple primary diagnoses for all episodes of the clients who received services. The report can be filtered by programs and a service provider.	Missing or Multiple Primary Diagnoses
Client	11/15/2016	CANS/ANSA Client Report	The "CANS/ANSA Graph Report" displays strengths and weaknesses of a client according to CANS/ANSA assessments in a graph format for one or more of the assessments, or for every date an assessment was completed.	CANS ANSA Graph Report
Review before billing	6/1/2016	Missing DFF	The "Missing DFF" report displays the information about all of the missing Decentralized Financial Forms for all episodes of the clients who received services. The time period is defined within the parameters of a 'Begin Date' and an 'End Date.' The report can be filtered by date range and programs.	Missing DFF
ERS	4/1/16	ERS: Program Statistic Visits Report	Online Documentation - Netsmart	Available within Avatar
ERS	4/1/16	ERS: Program Statistic Admission	Online Documentation - Netsmart	Available within Avatar