BHS Helpful QI Lists and Screens in SmartCare

The purpose of this document is to provide you with some information regarding helpful QI reports and lists that are currently available in SmartCare. Please note that there is usually more than one way to gather information in SmartCare and these are some options to display information applicable to the QI role. The UR Committee may continue to add to this list as SmartCare evolves.

#	SmartCare List or Screen Name	Description
1	**Active Client Signed Assessments (SAC)**	This report gathers the most recent date of signed assessments by client (provides last five reports) for: CalAIM, Crisis, ASAM, ANSA, CANS and PSC-35 for all enrolled members of a selected Program (CDAG secure). * *Similar to the Avatar Report: "Active Client Final Assessments"*
2	**Active Clients Without Diagnosis (My Office)**	This report shows active clients that do not have a diagnosis document, by episode, status, primary program, and primary clinician. **Similar to the Avatar Report: "Client Diagnosis Report" that would show if a diagnosis was missing for a client.*
3	**CalOMS Admission**	Records the CalOMS Admission when enrolling clients into treatment provider. This is required by DHCS. **(SUPT only)**
4	**CalOMS Standalone Update/Discharge (Client)**	Records the CalOMS Update/Discharge for annual updates and discharges. This is required by DHCS. **(SUPT only)**
5	**Care Plan Status (SAC) (My Office)**	This report shows the first Care Plan (from a Progress Note) and the Last Plan (if there is more than one) for clients between a date range, with their name, ID number, enrollment, and discharge date.
6	**Census Detail Report (SAC)**	From a list of programs, select the program, date range and team role and this report provides a list of currently enrolled clients with enroll date, client's age, and last DOS and name of team member (if provided). * *Similar to the Avatar Report: "Detailed Outpatient Census NEW"; "Provider Last Service Report"*
7	**Census Summary Report (SAC)**	Displays client demographic information across selected programs by showing graphs for: sex, race, primary language, and age. * *Similar to the Avatar Report: "Client Demographics Report"*
8	**Client Abbreviated Notes Report (Client)**	This report gives a brief overview of any type of note created for the client. This can be filtered by Program/Author/Procedure Code ID's, start and end dates. This pulls up to 1000 service notes. **Similar to the Avatar Report "Progress Note Staff Report".*
9	**Client Allergies (Client)**	This is to enter client allergies. Once entered, the allergies will populate on the client's dashboard within the allergies widget.
10	**Client Clinical Problems (Client)**	This is where the client's Problems are added or resolved. **Similar to the Avatar Form: "Problem List"*
11	**CalMHSA Client Clinical Problem List (Clients)**	*This includes the staff name, which would be helpful when viewing charts.*
12	**Client Contacts Report (SAC) (My Office)**	This report displays a list of client contacts for the member selected by program and type of contact (admin staff).

13	**Client Face Sheet**	Selected by program with a client level summary. ** Similar to the Avatar Report: "Client Data Sheet"*
14	**Client Flags (Client)**	This is used to open or end/complete a flag for a client with a specific flag type. The flag icon will be displayed next to the client's name if any flags have been entered for a client. **Similar to the Avatar Report: "Clinical Pathways."* **(MH only)**
15	**Client Flags (My Office)**	This is a list of the clients with a flag. This can be filtered by staff, client, program, flags, status, and time. **Similar to the Avatar Report: "Clinical Pathways By Program."* **(MH only)**
16	**Client Information (Client)** • **Includes Contacts tab**	This is used to enter (gather) client demographic data. This screen also contains the "Client Contacts tab" where client contacts are entered. *This data was formerly gathered in Avatar forms: "Update Client Data" and "Client Resources"*
17	**Client Inquiry (Client)**	This is pertaining to a specific client but has the same fields as listed above in the "Inquiries (My Office)." New client inquiries can also be created using the paper icon. **Similar to the Avatar Report: "Service Request 2.0. and Service Request Response 2.0 and System of Care Services Request Response 2.0 "*
18	**Client Last 10 Notes (SAC)**	This report shows the last 10 notes with the author, procedure code, service date, program, status-brief overview.
19	**Client Programs (Client)**	This shows a list of a client's program, status, enrolled and discharged date, assigned staff, last DOS. Note that this is another way you can filter by status showing: All Statuses, Discharged, Enrolled, Not Discharged, Requested. This is similar to a Movement History but without the diagnosis. A new client enrollment can be created using the paper icon. **Similar to the elements found in the following Avatar Reports: "MH SR 2.0 Dispositions by Program" and "Detailed Outpatient Census (New) Report."*
20	**Conservators and Guardians (SAC)**	A secure list of names related to conservators and/or guardians.
21	**CSI Standalone Collection**	This would be completed per individual client. Collects required demographics. Required to be completed at the initial clinical bundle and updated as needed. At discharge will need to complete fields specific to discharge. **This is where the information pertinent to the Missing CSI By Program used to be entered in Avatar.* **(MH only)**
22	**Documents (Client)**	This list shows you the documents for a client over a date range and the status of the documents that may be helpful if you are monitoring/reviewing a client's chart. It can be filtered to show the status of the document (All statuses, signed, completed, to do, in progress, signed, completed, to co-sign, Not signed, Completed

		and to sign.) This is also where you are able to find the Avatar Face Sheet which provides historical client information from Avatar. **Similar to the Avatar Reports "Assessments Stuck In Draft"*
23	**ECM and Outreach Counts (SAC)**	This report provides the total number of ECM Outreach Contacts and Care Management Services for each enrolled client within an ECM program. The date range can be specified for each program for this report. Program selection is based on those assigned to the logged in user. **Similar to the Avatar Report: "ECM Services (program)" however does not include specific dates of these services.*
24	**Inquiries (My Office)**	This shows you the clients who are requesting services into the program. Client, Client ID, Inquired, start date and time, who it was recorded by, who it was assigned to, disposition, inquiry status and program name. The list shows you programs Inquiries can be "in progress" or can be "complete." Providers should monitor this list page to see clients who are requesting services and the disposition. New inquiries can also be created using the paper icon **Similar to the Avatar Report: "MH SR 2.0 Dispositions by Program" Showed the request and disposition information for requests disposed where the program selected is either the submitter or they have an open episode as of the disposition date.*
25	**Program Allergies Report (SAC)**	List of all allergies for currently enrolled clients at the selected program (based on programs assigned to the logged in user) Can export report to selected format.
26	**Program Assignments (Program)**	This shows you the Program's clients, status, date requested, date enrolled, date discharged. This can be filtered for your program, staff, and range of time. **Similar to the Avatar Report "Detailed Outpatient Census (New) Report." Provided a list of clients open to a program during a date range with Primary and Secondary funding source, service coordinator, provider start date and length of stay.*
27	**Program Coverage Report (SAC)**	Report displays clients currently enrolled or requested to a program that the user is assigned with their current first 4 Coverage plans. **Similar to the Avatar Report: "Guarantor Order Check"*
28	**Program Demographics Report (SAC)**	CDAG Secured report for a single program demographics during an enrolled date range. The last pages contain bar charts representing the various group demographics. * *Similar to the Avatar Report: "Client Demographics Report"*
29	**Program Denials (SAC)**	Denial Report by program that displays the denial reason, remark code description by client, service ID, PCCN, service date, procedure name and posted date.
30	**Program Treatment Team Assignments (SAC)**	This report displays the staff assigned to the client, their role, and start date assigned. Report has the option of Multi-Program selection based on programs in the user's CDAG.
31	**Program Unsigned Documents (SAC) (My Office)**	This report displays incomplete/unsigned documents and service notes by staff, client and date. **This is an improved version of "Active Client Final Assessment" and "Active Client Initial Assessment".*

32	**Progress Note Timeliness Report (SAC) (My Office)**	This report displays the average time for service(s) in the date range selected. This can be filtered by date, program, staff, and status of note. The information is displayed by program and staff, listing the service, client Id number and the time from the date/time of service to final modification for signed notes or today for notes still in progress. **Similar to the Avatar Report "Progress Note Timeliness Report".*
33	**Services (My Office)**	This list may help in monitoring things like clients, procedure descriptions, staff, units, charges, status, location, etc. This can also be filtered to meet the needs of the person monitoring. This screen will also allow administrative staff to enter services for a client. This is done by selecting the services (My Office) screen. Once In the list page, you have the option to create a new service by selecting the paper icon and then searching for the specific client. **Similar to the Avatar Report "Client Services Report (By Program).*
34	**Services/Notes (Client)**	This list is helpful if you are reviewing an individual client. Select the specific client, then select this list. It will show you information relevant to services for that specific client. It will not show the differences between ICC-CFT, KTA1 (ICC) or KTA2 (IHBS) procedure codes to as those are all covered under "TCM/ICC." The helpful thing about that list is that you can filter it very easily and you can export information. This is also the screen where direct care staff will go to enter Progress Notes. This is done by selecting the specific client, then selecting the services/notes screen. Once in the list page, you have the option to create a new note by selecting the paper icon. **Similar to the Avatar Report "Client Services Report (Single Client)."*
35	**Services (Client)**	Displays a list of services for the client selected by date of service, procedure, units, status, clinician, program. **Similar to the Avatar Report "Client Services Report (Single Client)"*
36	**Special Populations Report (SAC) (My Office)**	CDAG based report of members with selected special populations
37	**Special Population Housing Status (SAC) (My Office)**	CDAG based report of a members Housing status entered into the special populations tab.
38	**Staff for Program Report (SAC)**	Report displays Active Staff with data entry permissions (not just CDAG) to the programs selected; Program Parameter is NOT CDAG based, it is based on programs assigned to the logged in user. ** Similar to the Avatar Report: "System Code User List"*
39	**Staff Service Detail Report**	Report specific to staff and date range. Can run this report for multiple programs for CDAGs and totals at bottom for services provided. ** Similar to the Avatar Report: "Practitioner Productivity by Program"; "My Productivity Report"*

40	**Summary of Services Report (SAC)**	Report displays “Show” and “Completed” services (excluding cancels, no shows, errors, no shows); Grouped by Program/Degree/Procedure. ** Similar to the Avatar Report: Program Service Summary; Client Services Report (Program); Services by Classification*
41	**Timeliness Access Data Tool (TADT)**	Records timeliness to services: from request for services date, assessment offered, to treatment date. This is required by DHCS for all new members for Outpatient and Residential/WM providers. The following forms are options depending on type of services: MH: • Non-Psychiatric SMHS Timeliness • MH Psychiatric SMHS Timeliness SUPT: • DMC Outpatient Timeliness (For OS/IOS, Residential Services) • DMC Opioid Timeliness (For NTP/MAT Services) **(MH and SUPT)**
42	**Timelines/Flags/Events (Client)**	This is a historical detailed view of client flags for an individual client. This can be filtered by active or not, type of group, flag types and the effective date. You can also create a new flag using the paper icon. **Similar to the Avatar Report: “Clinical Pathways by Program”* **(MH only)**
43	**Treatment Team (Client)**	This is where you assign the program treatment team staff for a specific client. **Similar to Avatar form: Additional Episode Information/Case Coordinator.*

For an up-to-date list of SmartCare Reports and Lists Inventory, please search for “Reports” and “Lists” in SmartCare.

For reports specific to Sacramento County, please search for “Sac” in SmartCare.

If you have specific SmartCare functionality questions, then please contact the EHR Support Team: bhs-ehrsupport@saccounty.gov