

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 Screens and reports are available based on SmartCare role and classification, not all screens and reports outlined below will be accessible to all users. The UR Committee may continue to add to this list as SmartCare evolves.

| # | SmartCare List or Screen Name | Description |
|----|--|--|
| 1 | 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. <i>*Similar to the Avatar Report: "Client Diagnosis Report" that would show if a diagnosis was missing for a client.</i> |
| 2 | ASAM Errors Report (SAC) (My Office) | This report shows error messages on the ASAM for currently enrolled clients in the selected program (SUPT only) |
| 3 | CalMHSA Client Clinical Problem List (Client) | Client level report of problems which details the Client Name, Client ID, Entered/Modified By, Date, SNOMED Description and Code, ICD10 Code, Start and End Date, Program Name. |
| 4 | CalMHSA Client Medical Face Sheet Report (Client) | For the client selected, shows section in a "face sheet" format which will display (based on user selection) allergies, vitals, labs, medications, coverage, demographics, diagnosis and problems, and future appointments for the client. With the new Psych Note Template (coming soon), the last CURES and last AIMS dates will also be displayed. (MH prescribers only) |
| 5 | CalMHSA Client Missing Clinical Problem Report | For clients in the date range and for selected programs, shows a list of clients and how many (if any) problems they have on file. Can be run to only show clients with no problems if desired. |
| 6 | CalMHSA Co-Signer Status Report | For the date range, programs, status and signers selected, shows documents which were sent for co-signature and their current status. |
| 7 | CalOMS Admission | Records the CalOMS Admission when enrolling clients into treatment provider. This is required by DHCS. (SUPT only) |
| 8 | CalOMS Standalone Update/Discharge (Client) | Records the CalOMS Update/Discharge for annual updates and discharges. This is required by DHCS. (SUPT only) |
| 9 | CANS Errors Report (SAC) | CDAG secure (based on open programs) list of CANS errors associated to clients in the programs selected. (MH Only) |
| 10 | Care Plan Status (SAC) (My Office) | This report shows the first Care Plan (from a Progress Note) and the Most Recent Plan (if there is more than one) for clients open between a date range, Listing their name, client ID number, enrollment, and discharge date. This report can be filtered by Care Plan and/or Housing Plan split into Housing/Regular Care Plan based on procedure code (SAC Housing Plan Development). (MH only) |
| 11 | 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 |

BHS Helpful QI Lists and Screens in SmartCare

| | | |
|----|--|--|
| | | enroll date, client's age, and last DOS and name of team member (if provided). * <i>Similar to the Avatar Report: "Detailed Outpatient Census NEW"; "Provider Last Service Report"</i> |
| 12 | Census Summary Report (SAC) | Displays client demographic information across selected programs by showing graphs for: sex, race, primary language, and age. * <i>Similar to the Avatar Report: "Client Demographics Report"</i> |
| 13 | 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. * <i>Similar to the Avatar Report "Progress Note Staff Report".</i> |
| 14 | Client Address/Phone Report (SAC) (My Office) | This report displays client address and primary phone number along with SmartCare ID and name for a selected program for currently open clients. |
| 15 | Client Allergies (Client) | This is to enter client allergies. Once entered, the allergies will populate on the client's dashboard within the allergies widget. |
| 16 | Client Clinical Problems (Client) | This is where the client's Problems are added or resolved. * <i>Similar to the Avatar Form: "Problem List"</i> |
| 17 | Client Contacts Report (SAC) (My Office) | This report displays a list of client contacts for the member selected by program and type of contact. Does not exclude records (PCP), which does not include phone number |
| 18 | Client Linkages Report (SAC) | Displays clients currently enrolled in a selected program and all other programs the clients are enrolled in concurrently. Updated from original version to make this report CDAG secure. If a coordinated care consent is on file for the client, the client's information will be displayed. |
| 19 | Client Face Sheet | Selected by program with a client level summary. * <i>Similar to the Avatar Report: "Client Data Sheet"</i> |
| 20 | 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. * <i>Similar to the Avatar Report: "Clinical Pathways."</i> (MH only) |
| 21 | 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. * <i>Similar to the Avatar Report: "Clinical Pathways By Program."</i> (MH only) |
| 22 | Client Flags Report (SAC) (My Office) | This report allows you to run by program(s), flag type, enrollment status, start and end dates for clients in the selected program. |
| 23 | 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. <i>This data was formerly gathered in Avatar forms: "Update Client Data" and "Client Resources"</i> |

BHS Helpful QI Lists and Screens in SmartCare

| | | |
|----|---|--|
| 24 | Client Inquiry (Client) | <p>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.</p> <p><i>*Similar to the Avatar Report: "Service Request 2.0. and Service Request Response 2.0 and System of Care Services Request Response 2.0"</i></p> |
| 25 | Client Last 10 Notes (SAC) | <p>This report shows the last 10 notes with the author, procedure code, service date, program, status-brief overview.</p> |
| 26 | Client Programs (Client) | <p>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.</p> <p><i>*Similar to the elements found in the following Avatar Reports: "MH SR 2.0 Dispositions by Program" and "Detailed Outpatient Census (New) Report."</i></p> |
| 27 | Conservators and Guardians (SAC) | <p>A secure list of names related to conservators and/or guardians.</p> |
| 28 | CSI Standalone Collection | <p>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.</p> <p><i>*This is where the information pertinent to the Missing CSI By Program used to be entered in Avatar.</i></p> <p>(MH only)</p> |
| 29 | Demographics by Diagnosis Category (SAC) (My Office) | <p>For clients enrolled in a date range with their most recent diagnosis by date. This report breaks down the diagnosis based on the selected Breakdown Category (Diagnosis Combination, MH Categories Only, SUD Categories Only, or Details only displaying results in 3 possible groups for Sex, age, Language, and race.</p> |
| 30 | Discharge Detail Report (SAC) | <p>For date range and programs selected, shows counts by discharge reason and includes a detailed list.</p> |
| 31 | Documents (Client) | <p>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.</p> <p><i>*Similar to the Avatar Reports "Assessments Stuck In Draft"</i></p> |
| 32 | ECM and Outreach Counts (SAC) | <p>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.</p> <p><i>*Similar to the Avatar Report: "ECM Services (program)" however does not include specific dates of these services.</i></p> |
| 33 | EBP Counts by Program (SAC) | <p>For date range and programs selected, shows EBP counts both by month and year of services by client.</p> |

BHS Helpful QI Lists and Screens in SmartCare

| | | |
|----|--|---|
| | | <i>Reminder that "Unknown Evidenced-Based Practice/Service Strategy is not required. If not using an EBP or SS, then that field would be blank.</i> |
| 34 | Inquiries (My Office) | <p>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.</p> <p><i>*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.</i></p> |
| 35 | Inpatient LOS (SAC MHTC) (My Office) | For clients admitted between a specified date range displaying their LOS in hours and days, any leave hours, the attending physician and last. |
| 36 | Medi-Cal Correction Tracking (SAC) | For date range and programs selected, shows Voids, Replacements and Rebills processed. Run this by processing date, not by service date. If you run this by a certain date, then you will not need to run it again because EHR Billing Team will not back date it. |
| 37 | Mode of Delivery Report (SAC) | Summary level (similar to the EBP version) of services with Modes of Deliver identified by Program. |
| 38 | 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 reports to selected format. |
| 39 | Program Approvals (SAC) | Medi-Cal approvals posted for a date range that displays the Client Name, Client ID, Service ID, PCCN, Service Date, Procedure Name, Billing Code, Date Poste and Charge Units. |
| 40 | Program Assessments Due (SAC) | Shows status of ASAM, CANS, ANSA, PSC35, CalAIM assessments. Logic for due dates and "next" due date for each applicable assessment. |
| 41 | Program Assignments (Program) | <p>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.</p> <p><i>*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.</i></p> |
| 42 | Program CalOMS Status (SAC) (My Office) | This report shows the status of the CalOMS Admissions and Discharges and count for the selected programs. (SUPT Only) |
| 43 | Program Charge Summary (SAC) | This report displays program-based data on Service Type Units provided by degree with the ability to filter by Service Type, Charge Created Dates, Service Dates and Degree name or code. |
| 44 | 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. |

BHS Helpful QI Lists and Screens in SmartCare

| | | |
|----|---|---|
| | | <i>*Similar to the Avatar Report: "Guarantor Order Check"</i> |
| 45 | 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. <i>* Similar to the Avatar Report: "Client Demographics Report"</i> |
| 46 | Program Denials (SAC) (My Office) | Denial Report by program that displays the denial reason, CIN from the denial, remark code description by client, service ID, PCCN, service date, procedure name and posted date, and provider Taxonomy from 837. |
| 47 | Program Housing Days Report (SAC) | For clients enrolled during the date range selected, counts the number of days by special population. Admitted (open enrollments), Literally Homeless (Literally Homeless-Chronic Homelessness OR Literally Homeless-Not Chronic Homeless), Lother Homeless (Homeless-Sheltered OR Homeless-Bridge/interim Or Transitional Temporary Housing), Housed (Housed/No Imminent Risk of Homelessness OR Imminent Risk of Homelessness. If none of the above in the date range are selected, notes, No Housing on file. If there is ANY record of Chronic Homelessness (even if not currently active), flags the client as Hx of Chronic. Note that total days in a housing status could be OVER or UNDER count based on open days if special populations overlap or do not cover the full date range. |
| 48 | Program TADT Status (SAC) (My Office) | This report for the program selected, shows clients who need a TADT (no Medi-Cal Billable service in the year prior to the enrollment) and their TADT status(s) if completed. |
| 49 | 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. |
| 50 | Program Signed Assessment | This report gathers the most recent date of signed assessments by client (provides last five reports) for: CalAIM, Crisis, CSI Standalone, ASAM, ANSA, CANS and PSC-35, TADT for all enrolled members of a selected Program (CDAG secure). <i>* Similar to the Avatar Report: "Active Client Final Assessments"</i> |
| 51 | Program Unsigned Documents (SAC) (My Office) | This report displays incomplete/unsigned documents and service notes by staff, client and date. <i>*This is an improved version of "Active Client Final Assessment" and "Active Client Initial Assessment".</i> |
| 52 | Progress Note Search (SAC) (Client) | This client-based report allows you to have the capability of a word search in progress notes which can be filtered by author, procedure(s) and date range |
| 53 | Progress Note STAFF Search (SAC) | Replicated form the Abbreviated Notes Report (or Progress Note Search), but STAFF based instead of CLIENT based Staff search is NOT secured, but output is CDAG secured. Staff can be search by StaffID, UserCode, Last Name, First Name, Full Name, or Email or any portion of any of those elements. Date range defaults to 90 days, but it can be changed. Programs and Procedures are driven by Authored notes in the date range, but default to all, Search text allows for searching actual note text for a word/phrase if desired. |

BHS Helpful QI Lists and Screens in SmartCare

| | | |
|----|--|--|
| 54 | Progress Note Timeliness Report (SAC) (My Office) | <p>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.</p> <p><i>*Similar to the Avatar Report "Progress Note Timeliness Report".</i></p> |
| 55 | PSC-35 Errors Report (SAC) | <p>CDAG secure (based on open programs) list of PSC-35 errors associated to clients in the programs selected.</p> <p>(MH only)</p> |
| 56 | Services (My Office) | <p>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.</p> <p><i>*Similar to the Avatar Report "Client Services Report (By Program).</i></p> |
| 57 | Services/Notes (Client) | <p>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.</p> <p>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.</p> <p><i>*Similar to the Avatar Report "Client Services Report (Single Client)."</i></p> |
| 58 | Services (Client) | <p>Displays a list of services for the client selected by date of service, procedure, units, status, clinician, program.</p> <p><i>*Similar to the Avatar Report "Client Services Report (Single Client)"</i></p> |
| 59 | Service Verification Report (SAC) (My Office) | <p>This report can be utilized to support with monthly service verification compliance. The report defaults to return a 5% parameter that is calculated based on the count and the selected date range. The report returns client name, mailing address, primary language, phone number and the details of the services.</p> |
| 60 | Special Populations Report (SAC) (My Office) | <p>CDAG based report of members with selected special populations</p> |
| 61 | Special Population Housing Status (SAC) (My Office) | <p>CDAG based report of a members Housing status entered into the special populations tab.</p> |
| 62 | Staff for Program Report (SAC) (My Office) | <p>Report displays Active Staff with data entry permissions (not just CDAG) to the programs selected; Program Parameter is NOT CDAG</p> |

BHS Helpful QI Lists and Screens in SmartCare

| | | |
|----|---|---|
| | | based, it is based on programs assigned to the user running the report. * <i>Similar to the Avatar Report: "System Code User List"</i> |
| 63 | Staff Schedule Report (SAC) | For date range and staff selected, shows scheduled appointments in a calendar layout format. |
| 64 | 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. * <i>Similar to the Avatar Report: "Practitioner Productivity by Program"; "My Productivity Report"</i> |
| 65 | Summary of Services Report (SAC) | Report displays "Show" and "Completed" services (excluding cancels, no shows, errors, no shows); Grouped by Program/Degree/Procedure. * <i>Similar to the Avatar Report: Program Service Summary; Client Services Report (Program); Services by Classification</i> |
| 66 | Summary of Services by Procedure (SAC) | Simplified version of the Summary of Services Report without the degree breakdown. Results are grouped by Program and procedure code. |
| 67 | 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: <ul style="list-style-type: none"> • Non-Psychiatric SMHS Timeliness • MH Psychiatric SMHS Timeliness SUPT: <ul style="list-style-type: none"> • DMC Outpatient Timeliness (For OS/IOS, Residential Services) • DMC Opioid Timeliness (For NTP/MAT Services) (MH and SUPT) |
| 68 | 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. * <i>Similar to the Avatar Report: "Clinical Pathways by Program"</i> (MH only) |
| 69 | Treatment Team (Client) | This is where you assign the program treatment team staff for a specific client. * <i>Similar to Avatar form: Additional Episode Information/Case Coordinator.</i> |

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.

BHS Helpful QI Lists and Screens in SmartCare

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