

List Pages and Reports

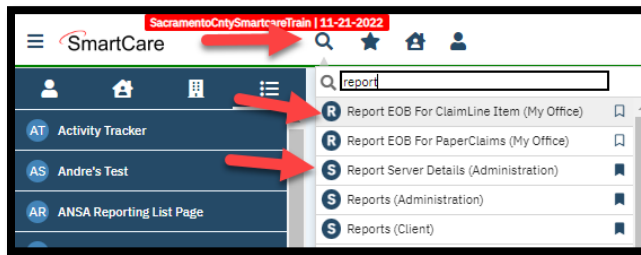
This Tip Sheet will walk users through how to use List Pages and Reports. This Tip Sheet may change as our trainings and systems are updated. Please visit our website <https://dhs.saccounty.gov/BHS/Avatar/Pages/Avatar.aspx> for the most updated version. If any additional help is needed you can contact us at Avatar@saccounty.net.

List Pages information

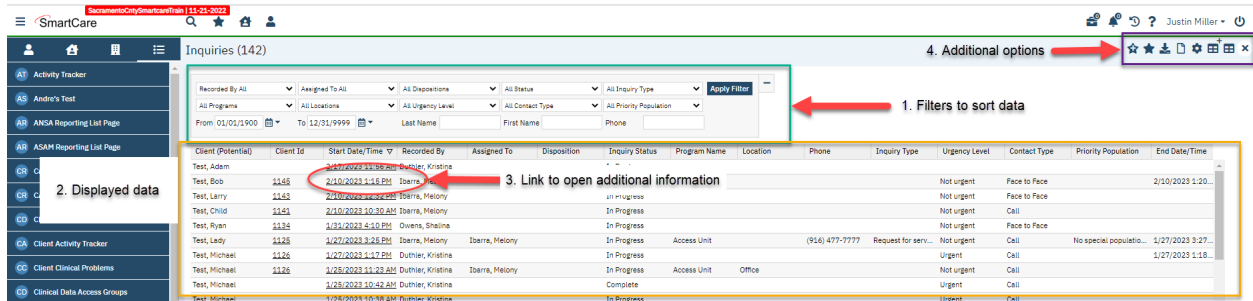
List pages provide a way to view information in a list format. You can filter the information and create custom sorts that you can use later. You are also able to click on links on the page to open additional pages of information.

Search for a List page

- When searching for an item list Pages may be labeled with an “S” next to the name of the item.
 - Items marked with “R” are for traditional style reports.

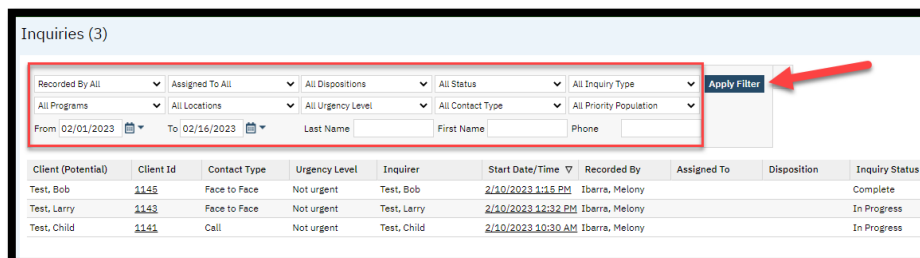


List Page Layout



1. Sorting Data on the List Page

- You can select 1 or more filters. Once you have selected all of the filters click “Apply filter”
- Then the page will only display the data that was filtered.



2. Displayed information

- The list page will contain information that is sortable and may have clickable links. This information is affected by the filters above.
- The information is laid out similar to a spreadsheet.

Client (Potential)	Client Id	Start Date/Time	Recorded By	Assigned To	Disposition	Inquiry Status	Program Name	Location	Phone	Inquiry Type	Urgency Level	Contact Type	Priority Population	End Date/Time
Test, Adam	1145	2/10/2023 11:59 AM	Duhamer, Kristina			In Progress								
Test, Bob	1145	2/10/2023 1:15 PM	Ibarra, Melony			Complete					Not urgent	Face to Face		2/10/2023 1:20
Test, Larry	1143	2/10/2023 12:32 PM	Ibarra, Melony			In Progress					Not urgent	Face to Face		
Test, Child	1141	2/10/2023 10:30 AM	Ibarra, Melony			In Progress					Not urgent	Call		
Test, Ryan	1134	1/31/2023 4:10 PM	Owens, Shalina			In Progress					Not urgent	Face to Face		
Test, Lady	1126	1/27/2023 3:28 PM	Ibarra, Melony	Ibarra, Melony		In Progress	Access Unit		(916) 477-7777	Request for serv...	Not urgent	Call	No special populat...	1/27/2023 3:27
Test, Michael	1126	1/27/2023 11:17 AM	Duhamer, Kristina	Ibarra, Melony		In Progress	Access Unit	Office			Not urgent	Call		1/27/2023 1:18
Test, Michael	1126	1/25/2023 11:43 AM	Duhamer, Kristina			Complete					Urgent	Call		
Test, Michael	1126	1/25/2023 10:43 AM	Duhamer, Kristina			In Progress					Urgent	Call		
Test, Michael	1126	1/25/2023 10:38 AM	Duhamer, Kristina			In Progress					Urgent	Call		

3. Opening Links

- If you need to get extra information, you can click on any link on the List Page and it will open a different page of information.
 - This will allow you to enter or update information in a different part of the record

Client (Potential)	Client Id	Contact Type	Urgency Level	Inquirer	Start Date/Time	Recorded By	Assigned To	Disposition	Inquiry Status
Test, Bob	1145	Face to Face	Not urgent	Test, Bob	2/10/2023 1:15 PM	Ibarra, Melony			Complete
Test, Larry	1143	Face to Face	Not urgent	Test, Larry	2/10/2023 12:32 PM	Ibarra, Melony			In Progress
Test, Child	1141	Call	Not urgent	Test, Child	2/10/2023 10:30 AM	Ibarra, Melony			In Progress

Inquiry Details | Guide Menu

Initial | Insurance | Demographics

Crisis

Inquirer Information

Relation To Client: First Name: Middle Name: Last Name:

Call Back: Ext: Email:

Start Date: Start Time:

Client Information (Potential)

First Name: Middle Name: Last Name: Client ID: Sex:

SSN: SSN Unknown/Refused DOB: Age (43 Years) Medicaid Id:

Home Phone: Cell: Email:

Client is not homeless Client is homeless Client is chronically homeless

Urgency Level:

Address1: Inquiry type:

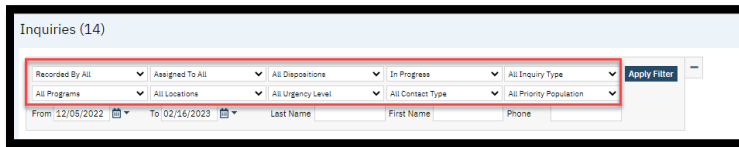
Address2: Contact type:

City: Priority Population:

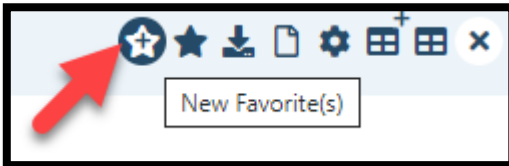
4. Upper Section

Saving and selecting filters as a favorite

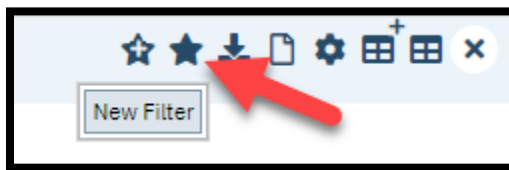
- You can save and use different filter options for each List Page.
 - To Save a list page select the filters that you want to use



- Click on the “New favorites” button to save the filter



- To use the filter click on the “New Filter” icon

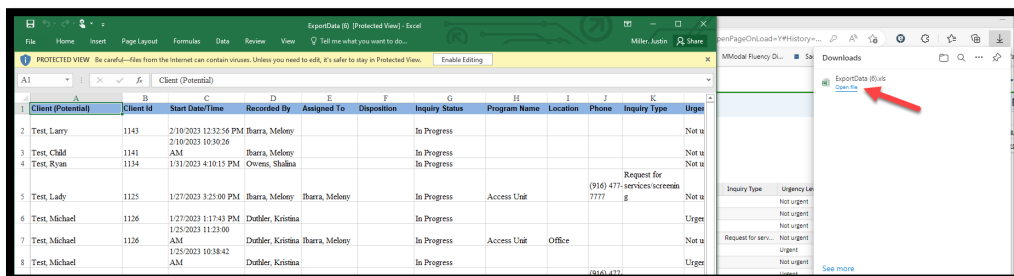


Exporting the List Page

- You can export the List page information into an excel spreadsheet by clicking on the “Export” icon.

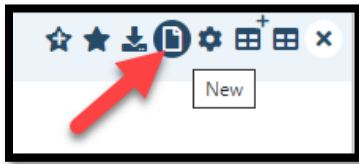


- This will download the file and then you can open to view the information



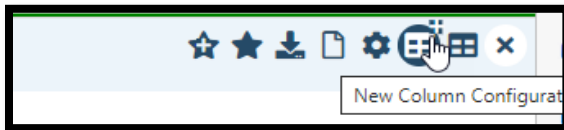
Creating a new document from the list page

- By clicking on the “New” icon this will allow you to create a new entry for the topic of the list page you are in if applicable.

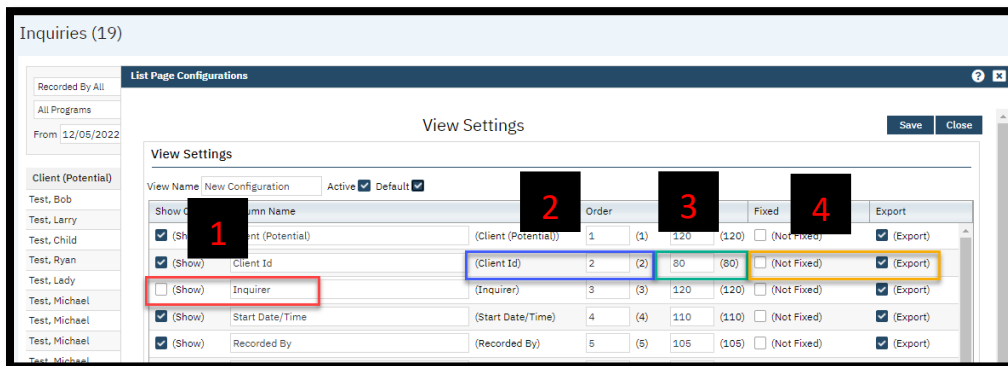


Creating and Selecting a new Column Configuration

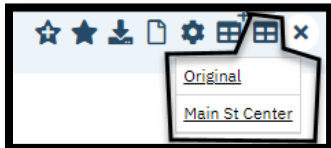
- Creating a new Column Configuration-You can change the fields that appear on the List Page by creating a **New Column Configuration**.



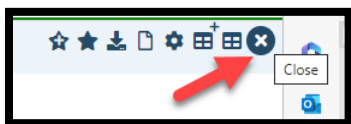
- You can **deselect the items** you do not want to appear or add items
- You can also change the **order** the item appears on the list by changing the number in the “Order Field”
- You can adjust the **width of the column** and set it as **Not fixed** and allow **export**.
- Once you have made all of your changes you need name the setting “**View Name**”, select if it is the “**Default**” view. Click “**Insert**” then click “**Save**”



- Once a new Column configuration is created, you can select the configuration you want to use to show only the data you need to view.



- To close the List Page you can click on the “Close” icon



Report information

Reports allow you to view and print information by **Program and** or other criteria. You can export the data into other formats as well as printing.

Report Layout

The screenshot shows the 'Allergies' report interface. At the top, there are four numbered callouts: 1. Report Parameters (pointing to the 'Program' dropdown), 2. Upper Section-Favorites, Fax and View Report (pointing to the top right icons), 3. Page Selection, Search, Export, Refresh & Print (pointing to the search and navigation bar), and 4. Report Information (pointing to the data table). The table has columns for Client ID, Last Name, First Name, Allergy, Allergy Reaction, and Allergy Severity.

Client ID	Last Name	First Name	Allergy	Allergy Reaction	Allergy Severity
1032	Thompson	Toby	Penicillins	Seizure	Severe
1093	Barnes	Kim	Sulfa (Sulfonamide Antibiotics)	Swollen face, lips, or tongue	Moderate to severe
1032	Thompson	Toby	Sulfa (Sulfonamide Antibiotics)	Hives	Severe
1130	Test	Charlotte	Peanut	Hives	Medium
1093	Barnes	Kim	milk	Hives	Moderate to severe
1120	Test	Kim	Peanut	Seizure	Severe

1. **Report Parameters**-Select the Report Parameters needed to run the report. Depending on the Report there are different filters/criteria that you need to select before you click on **“View Report”** .

Example 1

A screenshot of the 'Program' dropdown menu, showing 'Outpatient MH Adult' selected.

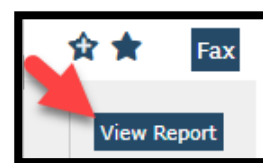
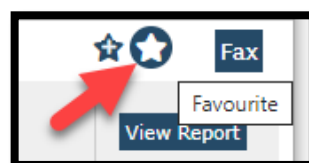
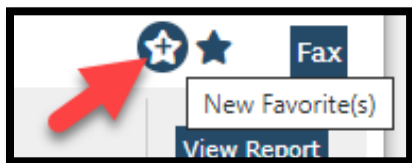
Example 2

A screenshot showing the 'Program' dropdown menu set to 'Outpatient MH Adult' and the 'Date' field set to '2/28/2023'.

Example 3

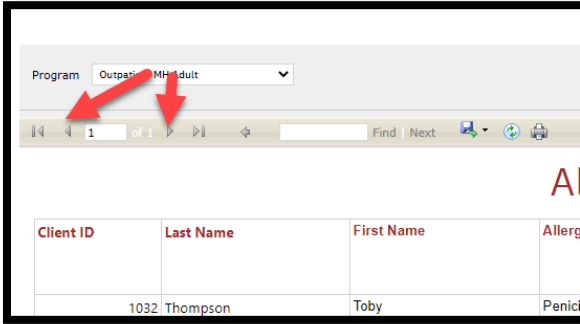
A screenshot showing the 'Administration From' field set to '2/7/2023', 'Administration To' set to '2/28/2023', 'Order Type' set to 'Labs', and 'Save to Client Record as PDF' set to 'No'.

2. **Upper Section**- You can save and retrieve a layout as a favorite for a report using the **favorite's icons**. You need to click on **“View Report”** to display the information based on the criteria selected.

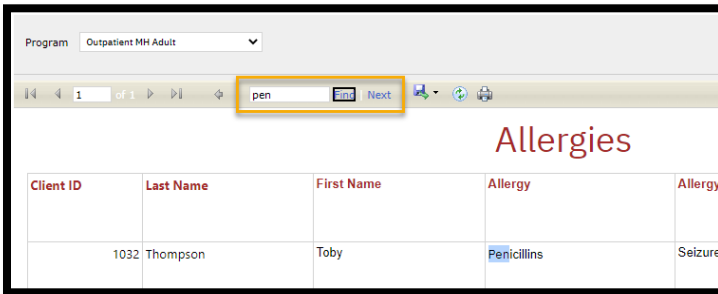


- Middle Pane- Page selection, Search, Export, Refresh & Print-** Once the data is displayed in the information pane you can Navigate if there is more than one page. You can also Export or print the data (see below)

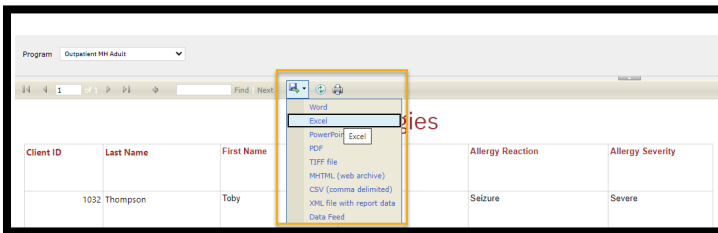
Page Selection-once the report has rendered you can navigate to additional pages



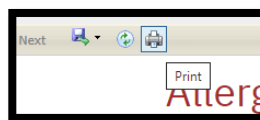
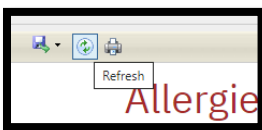
Search Report-You can search for key words in the report



Export-You can export the file into a different file format



Refresh & print-You can **Refresh** the report or **Print** the report to a printer



- Report Information**-This is where the information that was requested is displayed

