



## Reporting Tools

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# Reporting Tools

In this lesson you will learn about the variety of reports available to assist you in getting your job done. Avatar's reporting tools are invaluable for producing real-time, up to date information.

This lesson specifies which reports are likely to be used by administrators and clinicians and which reports are likely to be used by managers and supervisors.

## Lesson Objectives

- Understand the different reporting tools available to administrators, clinicians, managers, and supervisors
- Learn to access, view, and print reports

## UNDERSTANDING REPORTING TOOLS

Avatar's reporting tools are an invaluable feature for producing real-time, up to date information. This lesson organizes reports based on who can use them: Both Clinical and Administrative staff, Clinical staff only, and Supervisor staff only. For a detailed description of how to work with a report window, see Lesson 8 in the *Introduction to Avatar* manual.

**NOTE:** Reports that are in draft form display the word DRAFT in a watermark across the center of the report.

## WHO CAN PERFORM THIS FUNCTION?

Administrative, clinical, and supervisory staff members use this feature. The reports that are available to an individual are determined by permissions set up in Avatar. The Avatar PM menu and the Avatar CWS menu contain some of the same reports, such as Face Sheet, but most of the reports differ in these menus.

## MENU PATHS

You can find all Reports in one of two menus:

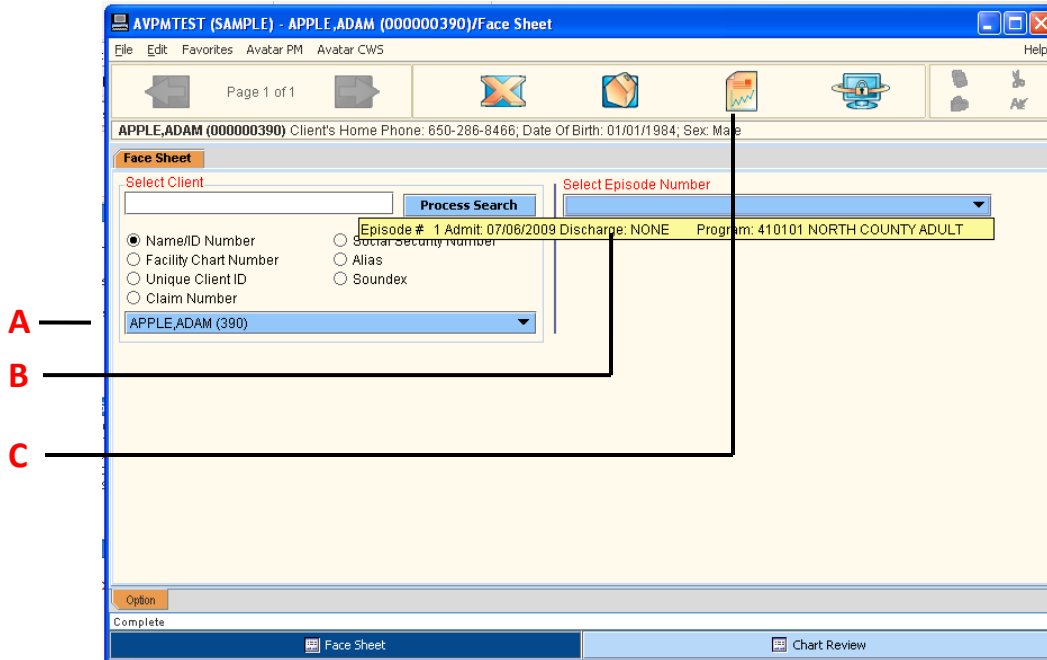
- Avatar PM → Reports → <report name>
- Avatar CWS → Reports → <report name>

## CLINICAL AND ADMINISTRATIVE REPORTS

The following reports are typically used by clinicians and administrators.

### FACE SHEET REPORT WINDOW

The Face Sheet is a summary of key client information.



Field	Description
A) Select Client	Verify the name of the client.
B) Select Episode Number	Select an episode number from the dropdown.
C) Process Icon	Click this icon to generate the Face Sheet.

Below is an example of the Face Sheet report window.

The screenshot shows a report window titled 'Face\_Sheet.rpt' with a 'Preview' tab. The report content includes the San Mateo County logo and the title 'San Mateo County BHR FACE SHEET'. The patient information is as follows:

Client/Episode: - 390 - 1      SS #:      Pseudo SS #:      Sex: Male      DOB: 1/1/1984  
 Family Number:

Name: APPLE, ADAM	Home Phone #: 650-286-8466	Language: English
AKA 1 : DOUBLE A	Work Phone #:	Preferred Language: English
AKA 2 :	Cell Phone #:	Parent's Language: English
Age: 25		Years Education: No Entry
Address: 714 ORCHARD LANE SAN MATEO, CALIFORNIA, 94401	CCP Coordinator:	

Admit Date: 7/6/2009      MOS:      Admit GAF:      Group 1:      Group 2:      Group 3:  
 Provider: 410101 NORTH COUNTY      Assigned Therapist: BECHER, MATT  
 Doctor:  
 Diagnosis Effective Date: 10/7/2009  
 Primary Dx: 100 D - TRAUMATIC STRESS DISORDER  
 Secondary Dx:  
 Conservatorship / Court Status: No Entry

Avatar adds another level of access to information at the bottom of the Face Sheet report called Episode Data Drill Down. By clicking any of these links you navigate directly to these additional reports. (You can also access these reports directly from the Reports command in the Avatar PM or Avatar CWS menus.)

The screenshot shows the same report window with additional information and a drill-down section:

Parent/ Guardian Name:	Home Phone #:	Work Phone #:
Next of Kin:	Relationship:	Phone #:
Emergency Contact Name:	Relationship:	Emergency Ph. #:
Special Population: No Entry		

Board & Care Operator:	Phone #:
Case Manager:	Phone #:
Conservator:	Phone #:
PCP (MediCal):	Phone #:

Discharge Date:	Discharge Status:
Discharge Living Arrangement:	
Discharge Legal Status:	
Discharge GAF:	If Requires Future Services:

**Episode Data Drill Down**

[Episode History](#)      [Diagnosis History](#)      [Legal Status History](#)      [Treatment History](#)  
[Demographic History](#)      [Attending Practitioner](#)      [Referral Source Data](#)

## **PROGRESS NOTES REPORT**

Avatar CWS→Reports→Progress Notes Report

Generates a report of all progress notes for a client within a set date range regardless of episode. Navigation is available (using the above menu path rather than the Face Sheet link) so you can navigate to notes for a specific episode.

## **PROGRESS NOTES REPORT BY CLINICIAN**

Avatar CWS→Reports→Progress Notes Report by Clinician

Generates a report of all progress notes written by a selected clinician within a set date range. Navigation is available so you can review both draft and final notes.

## **DIAGNOSIS REPORT**

Avatar CWS→Reports→Diagnosis Report

## **INFOSCRIBER MEDICATIONS REPORT**

Avatar CWS→Reports→Infoscriber Medications Report

Organized by client. Lists client allergies recorded in Infoscriber as well as current Prescriptions. Prescription information includes order date, drug name, dose, prescriber name, number of refills, prescription end date, and pharmacy name.

This report has two additional linked reports: Rx History for Last Year and Non-Infoscriber Prescriptions (reported by client).

## **ASSESSMENT REPORTS**

Avatar CWS→Reports→Assessment Reports→<report name>

- Adult Admission Assessment Report
- Adult Annual Assessment Report
- Adult Special Assessment Report
- LOCUS Report
- Mental Status Exam Report
- Child/Youth Admission Assessment Report
- Child/Youth Annual Assessment Report
- Child/Youth Special Assessment Report
- CALOCUS Repot
- Mental Status and Behavioral Observation
- Substance Use Assessment Report
- Physician's Initial Assessment Report

- Pre to 3 Admission Assessment Report
- Chapter 26.5 IEP Assessment Report

## **CASELOAD REPORTS**

Avatar CWS→Reports→Caseload Reports→Caseload Report by Program

Avatar CWS→Reports→Caseload Reports→Caseload Report by Clinician

- Caseload Report by Program  
Select by program—programs are listed by name, not program number. Information listed by primary therapist and primary psychiatrist. One line of information per client. Client information includes:
  - Name
  - Client ID
  - CA/LOCUS
  - Level of Care
  - Co-occurring Dx
  - 26.5 Indicator
  - Next IEP Date if 26.5
  - Primary Dx
  - Last Date of Service
- Caseload Report by Clinician  
Select by clinician. Lists all clients for whom the clinician is the primary therapist or primary psychiatrist. Format of report is the same as the above Caseload Report by Program.

## **O.D./W.I.C.C. STATUS REPORT**

Avatar CWS→Reports→O.D./W.I.C.C. Status Report

## **SKILLS AND ASSESSMENT REFERRALS REPORT**

Avatar CWS→Reports→Skills and assessment Referrals Report

## **ACTIVITY TRACKING REPORT**

Avatar CWS→Reports→Activity Tracking Report

## **CALL INTAKE HISTORY REPORT**

Avatar CWS→Reports→Call Intake History Reports



## **VAX LOCUS HISTORY REPORT**

Avatar CWS→Reports→Vax LOCUS History Report

This report displays a chart of a client's historic LOCUS scores based on data imported from VAX.

## **MEDICATION ADMINISTRATION RECORD REPORT**

Avatar CWS→Reports→Medication Administration Record Report

By client and date range. Report of progress notes written for medication administration. Displays with most recent note first.

## **PRE TO 3 DX REPORT**

Avatar CWS→Reports→Pre to 3 DX Report

## **TRANSFER/DISCHARGE REQUEST REPORT**

Avatar CWS→Reports→Transfer/Discharge Request Report

By client and request date. Request date lists only those dates that have an existing transfer/discharge request.

## **DAY TREATMENT PROGRESS NOTES REPORT**

Avatar CWS→Reports→Day Treatment Progress Notes Report

## **MANAGER / SUPERVISOR REPORTS**

The following reports are typically used by managers and supervisors.

### **CASELOAD REPORT BY PROGRAM**

Displays a list of all clients opened to a program, broken down clinical staff. The report also displays the date of the last service.

### **PROGRAM CENSUS REPORT**

Avatar CWS→Reports→Caseload Report by Program

Displays an alphabetic client list for a specified program. The report includes the MR#, admission date, date of birth, therapist, and psychiatrist. A total headcount appears at the end of the report.

### **TRANSFER/DISCHARGE REQUEST REPORT**

Avatar CWS→Reports→Transfer/Discharge Request Report

This report displays a list of all Transfer/Discharge requests for a client and their status.

## OTHER REPORTS

There are many administrative reports listed in the Avatar PM menu (Avatar PM→Reports→<report name>). You may want to look at that menu option to see what other reports are available.



### Exercise 1 Generate and View a Report

In this exercise you will generate a Progress Notes report for a client that displays all notes written for a specific episode within a specified date range.

**Before You Begin:** Select a sample client you are working with using the Select Client icon. In this example the client Adam Apple is used.

1. Choose Avatar CWS→Reports→ Progress Notes from the Menu Frame.  
*The Progress Notes window appears.*
2. Follow these steps to begin generating the Progress Notes report:

**A** Verify the client's name is in this field.

**B** Select a start and end date range.

**C** Click the Process icon.

The screenshot shows the 'Progress Notes' window with the following details:

- Client ID: APPLE, ADAM (390)
- Search Criteria: Name/ID Number (selected)
- Start Date: 01/01/2009
- End Date: 11/02/2009
- Buttons: Process Search, T, Y, T, Y, Option, Complete



Following is an example of a Progress Note report.

This is a list of all episodes and dates notes were written. Click the plus sign in front of an episode to display the dates, and then click one of the dates to jump directly to that note.

There are 11 total pages in this client's report.

Use the Search Text icon to search for specific words or phrases in all the notes.

The screenshot shows a software window titled "Progress\_Notes.rpt" with a toolbar at the top. On the left is a "Preview" pane with a tree view under "Episode 1 (410101 NORTH COL)" listing dates from 7/9/2009 to 10/21/2009. The main area displays a report header for "San Mateo County Behavioral Health & Recovery Services" and "PROGRESS NOTES" for the period "From 1/1/2009 To 11/2/2009". Patient information for "APPLE, ADAM (390)" is shown, including DOB, address, and program details. A note dated "7/9/2009 By MATT BECHER" is displayed, with a "Progress Note" section stating "This is Adam Apple's first progress note." and a "Supplemental Information" section with a question about language.

3. Click the Close  button in the upper-right corner of the window to exit the report.
4. Click the Close  icon in the Progress Notes Report window to close it.

