

CALMHSA CREATING REPORTS IN SMARTCARE PART 2 – OTHER REPORTING OPTIONS

AGENDA

- Other Reporting options
 - How to Create List View Favorites
 - How To Create Widgets in SmartCare and example (UMDAP widget)
- Review of Ad-hoc Reporting form in SmartCare
 - Purpose and Use Cases
 - What Ad-hoc Reporting does **NOT** do
- Set UP
 - Unrestricting Staff Information
- Creating a report
 - Will be CDAG compliant after March service pack is loaded into county TRAIN databases
- Saving a report for future use
 - Good for non-time critical data reporting



California Mental Health Services Authority

LIST VIEW FAVORITES

LIST PAGE FAVORITES

- Allows users to save or “favorite” list page settings for future use

The screenshot shows a web application interface for managing inquiries. At the top, there is a navigation bar with icons for search, favorites, home, and user profile. The user's name, Peter Merna, is displayed. Below the navigation bar, the page title is "Inquiries (221)". To the right of the title is a toolbar with icons for favorites, download, print, settings, and a close button. A green arrow points to the favorites icon.

Below the toolbar is a filter section with several dropdown menus and input fields:

- Recorded By: All
- Assigned To: All
- All Dispositions: All
- All Status: All
- All Inquiry Type: All
- Apply Filter
- All Programs: All
- All Locations: All
- All Urgency Level: All
- All Contact Type: All
- From: 01/01/1900
- To: 12/31/9999
- Last Name: [input field]
- First Name: [input field]
- Phone: [input field]

Below the filter section is a table of inquiries:

Client (Potential)	Client Id	Inquirer	Start Date/Time	Recorded By	Assigned To	Disposition	Inquiry Status	Program Name	Location	Phone
Cent, Fifty	1326	Cent, Fifty	5/5/2023 3:52 PM	Carav...	Cent, Fifty	Next Steps: Internal Provider Screen...	In Progress			555555
Cent, Fifty	1326	Cent, Fifty	1/1/2023 12:00 PM	Carav...	Caraveo, Sabrina		In Progress	Depression	Home	555555
Asano, Jason	1096	Asano, Jason	4/20/2023 12:54 AM	Huang...		Next Steps: Internal Provider MH Ser...	In Progress			707555
Knope, Leslie	1330	Knope, Leslie	1/1/2013 3:39 PM	Martin...	Martini, Kirsten		In Progress	Outpatient MH A...		
Reeves, Keanu	1329	Reeves, Keanu	4/18/2023 3:26 PM	Carav...	Caraveo, Sabrina		In Progress	Five Cent	Home	(555) 55
Plaza, Aubrey	1328	Plaza, Aubrey	4/18/2023 3:22 PM	Chopr...			In Progress			(71) 423
Washington, George	1327	Washington, George	4/18/2023 3:15 PM	Carav...			In Progress			
Cent, Fifty	1326	Cent, Fifty	1/1/2023 2:36 PM	Carav...	Caraveo, Sabrina	Next Steps: Internal Provider Screen...	In Progress	Adult Residential	Home	(555) 55
Cent, Fifty		Cent, Fifty	4/18/2023 12:27 PM	Carav...			In Progress			
Hepburn, Audrey	1321	Hepburn, Audrey	4/14/2023 10:44 AM	Gessn...			In Progress			
Gordon, Kim	1320	Gordon, Kim	4/14/2023 10:32 AM	Gessn...			In Progress			

LIST PAGE – NEW COLUMN CONFIGURATIONS

- Settings such as Show column, order, width, and export can be changed

View Settings Save Close

View Name Active Default

Show Column	Column Name	Order	Width	Fixed	Export
<input checked="" type="checkbox"/> (Show)	<input type="text" value="Client (Potential)"/> (Client (Potential))	<input type="text" value="2"/> (1)	<input type="text" value="120"/> (120)	<input type="checkbox"/> (Not Fixed)	<input checked="" type="checkbox"/> (Export)
<input checked="" type="checkbox"/> (Show)	<input type="text" value="Client Id"/> (Client Id)	<input type="text" value="1"/> (2)	<input type="text" value="80"/> (80)	<input type="checkbox"/> (Not Fixed)	<input checked="" type="checkbox"/> (Export)
<input checked="" type="checkbox"/> (Show)	<input type="text" value="Inquirer"/> (Inquirer)	<input type="text" value="3"/> (3)	<input type="text" value="120"/> (120)	<input type="checkbox"/> (Not Fixed)	<input checked="" type="checkbox"/> (Export)
<input checked="" type="checkbox"/> (Show)	<input type="text" value="Start Date/Time"/> (Start Date/Time)	<input type="text" value="4"/> (4)	<input type="text" value="110"/> (110)	<input type="checkbox"/> (Not Fixed)	<input checked="" type="checkbox"/> (Export)
<input checked="" type="checkbox"/> (Show)	<input type="text" value="Recorded By"/> (Recorded By)	<input type="text" value="5"/> (5)	<input type="text" value="105"/> (105)	<input type="checkbox"/> (Not Fixed)	<input checked="" type="checkbox"/> (Export)
<input checked="" type="checkbox"/> (Show)	<input type="text" value="Assigned To"/> (Assigned To)	<input type="text" value="6"/> (6)	<input type="text" value="105"/> (105)	<input type="checkbox"/> (Not Fixed)	<input checked="" type="checkbox"/> (Export)
<input checked="" type="checkbox"/> (Show)	<input type="text" value="Disposition"/> (Disposition)	<input type="text" value="7"/> (7)	<input type="text" value="100"/> (100)	<input type="checkbox"/> (Not Fixed)	<input checked="" type="checkbox"/> (Export)
<input checked="" type="checkbox"/> (Show)	<input type="text" value="Inquiry Status"/> (Inquiry Status)	<input type="text" value="8"/> (8)	<input type="text" value="100"/> (100)	<input type="checkbox"/> (Not Fixed)	<input checked="" type="checkbox"/> (Export)
<input checked="" type="checkbox"/> (Show)	<input type="text" value="Program Name"/> (Program Name)	<input type="text" value="9"/> (9)	<input type="text" value="100"/> (100)	<input type="checkbox"/> (Not Fixed)	<input checked="" type="checkbox"/> (Export)
<input type="checkbox"/> (Show)	<input type="text" value="Location"/> (Location)	<input type="text" value="10"/> (10)	<input type="text" value="100"/> (100)	<input type="checkbox"/> (Not Fixed)	<input checked="" type="checkbox"/> (Export)

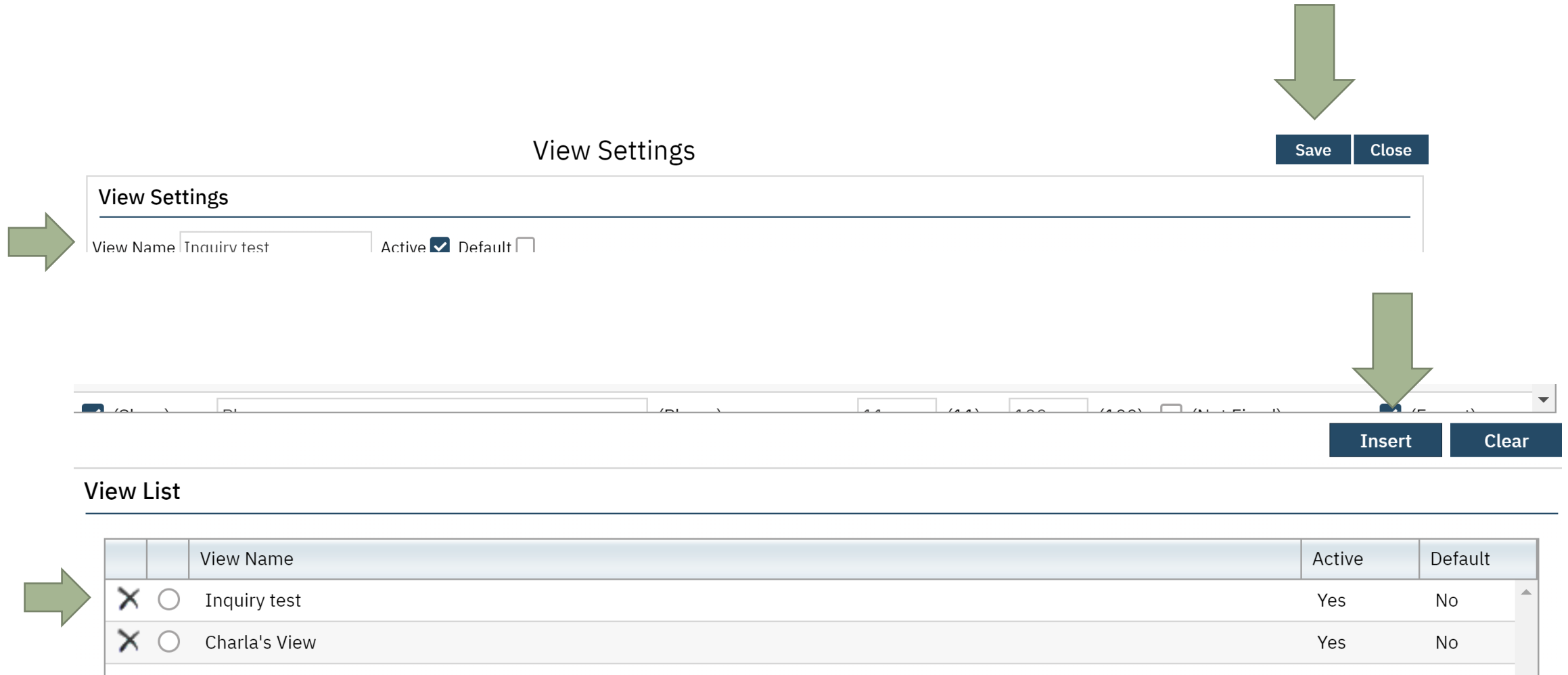
Insert Clear

View List

View Name	Active	Default
<input checked="" type="checkbox"/> Charla's View	Yes	No

LIST PAGE – ADD TO FAVORITES

- Enter View Name and Insert to add View List and click Save



View Settings

View Name Active Default

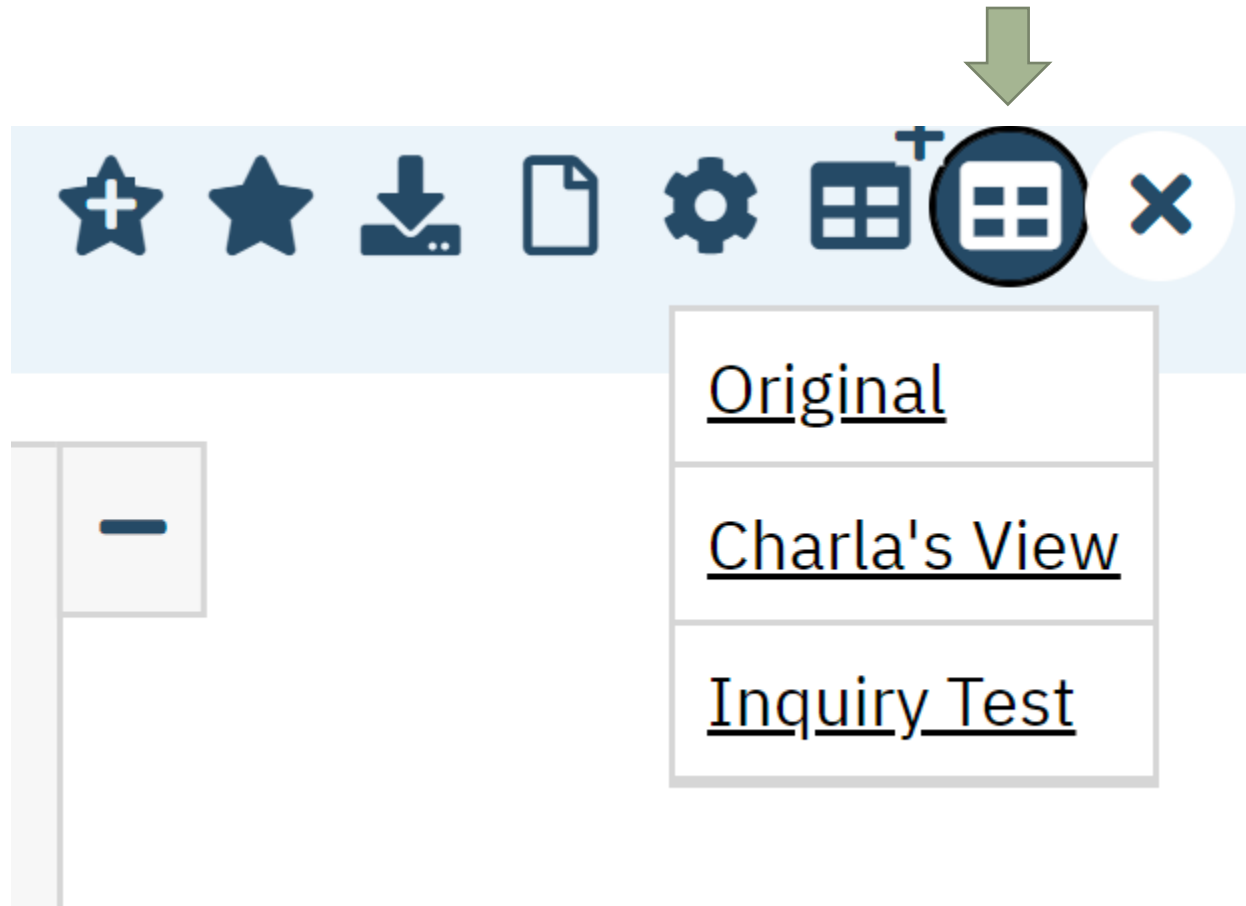
Save Close

View List

	View Name	Active	Default
<input checked="" type="checkbox"/>	Inquiry test	Yes	No
<input checked="" type="checkbox"/>	Charla's View	Yes	No

LIST PAGE – ACCESSING PREDEFINED VIEW LIST

- Click on Column Cofigurations icon and choose View List



LIST PAGE – PREDEFINED VIEW LIST

- Selected View List

Inquiries (222) ☆ ★ ⬇️ 📄 ⚙️ 🗒️ 🗒️ ✕

Recorded By All	Assigned To All	All Dispositions	All Status	All Inquiry Type	Apply Filter
All Programs	All Locations	All Urgency Level	All Contact Type		
From 01/01/1900	To 12/31/9999	Last Name	First Name	Phone	

Client Id	Client (Potential)	Inquirer	Start Date/Time	Recorded By	Assigned To	Disposition	Inquiry Status	Program Name	Lo
	Test, Colin	Test, Colin	5/8/2023 3:43 PM	Stark, Kimberly	Ashok, Sheelu	Next Steps: Inte...	In Progress	CalMHSA Admin	Offic
1326	Cent, Fifty	Cent, Fifty	5/5/2023 3:52 PM	Caraveo, Sabrina	Cent, Fifty	Next Steps: Inte...	In Progress		
1096	Asano, Jason	Asano, Jason	4/20/2023 12:54 AM	Huang, Delphine		Next Steps: Inte...	In Progress		
1329	Reeves, Keanu	Reeves, Keanu	4/18/2023 3:26 PM	Caraveo, Sabrina	Caraveo, Sabrina		In Progress	Five Cent	Horr
1328	Plaza , Aubrey	Plaza, Aubrey	4/18/2023 3:22 PM	Chopra, Ravi			In Progress		
1327	Washington, George	Washington, George	4/18/2023 3:15 PM	Caraveo, Sabrina			In Progress		
	Cent, Fifty	Cent, Fifty	4/18/2023 12:27 PM	Caraveo, Sabrina			In Progress		
1239	Training, Manual		4/17/2023 11:31 AM	Rowe, Charla		Warm Hand-Off	Complete		
1321	Hepburn, Audrey	Hepburn, Audrey	4/14/2023 10:44 AM	Gessner, Michael			In Progress		
1320	Gordon, Kim	Gordon, Kim	4/14/2023 10:32 AM	Gessner, Michael			In Progress		
1319	Lawson, Lesly	Lawson, Lesly	4/14/2023 9:34 AM	Gessner, Michael			In Progress		
	Lawson, Lesly	Lawson, Lesly	4/14/2023 9:02 AM	Gessner, Michael			In Progress		

1 2 Next Last 1



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WIDGETS

CREATE NEW WIDGET

- Click New button to create new widget (may not be enabled for counties)

Widgets (81)

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All Widget Types Apply Filter

Widget Id	Widget Name	Display As	Widget Type	Screen Id
26	Accounts Receivable	Accounts Receivable	General	
70	Accounts Receivable by Payer	Accounts Receivable by Payer	General	
95	Allergies	Allergies	Client	
21	Appointments For Today	Appointments For Today	General	
71	Appointment for Today with Past Schedu...	Services for Today with Past Scheduled	General	
76	Assigned Document(s)	Assigned Document(s)	General	
60	Authorizations	Authorizations	Insurer	
9	Authorizations Requested	Authorizations Requested	General	
93	BMI	BMI	Client	
104	CalOMS Reporting Summary	CalOMS Reporting Summary	General	
108	CalOMS Reporting Summary	CalOMS Reporting Summary	General	
105	CANS Reporting Summary	CANS Reporting Summary	General	
109	CANS Reporting Summary	CANS Reporting Summary	General	
57	Care Management Claims	Master Claims Widget	Insurer	
56	Care Management New Alerts/Messages	Care Management New Alerts/Messages	General	

↑

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WIDGET TYPES

- Choose from Client, General, Insurer or Provider widget types

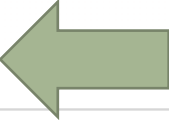
Widget Detail

Widget Detail

General

Widget Name	<input type="text" value="UMDAP test"/>	Display As	<input type="text" value="UMDAP test"/>	<input checked="" type="checkbox"/> SmartView	
				<input type="checkbox"/> Patient Portal	
Width	<input type="text" value="1"/>	Minimum Width	<input type="text" value="1"/>	Maximum Width	<input type="text" value="4"/>
Height	<input type="text" value="1"/>	Minimum Height	<input type="text" value="1"/>	Maximum Height	<input type="text" value="4"/>
Default Order	<input type="text"/>	Refresh Interval (In Minutes)	<input type="text" value="10"/>	Auto Refresh Interval (In Minutes)	<input type="text" value="10"/>
Widget Url	<input type="text"/>				
Widget Type	<input type="text" value="Client"/>				
Widget Builder Type	<input type="text" value="Client"/>				

Client
General
Insurer
Provider



WIDGET BUILDER TYPE

- Choose from Documents, FlowSheets or Favorites

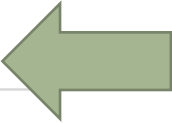
Widget Detail

Widget Detail

General

Widget Name	<input type="text" value="UMDAP test"/>	Display As	<input type="text" value="UMDAP test"/>	<input checked="" type="checkbox"/> SmartView	
				<input type="checkbox"/> Patient Portal	
Width	<input type="text" value="1"/>	Minimum Width	<input type="text" value="1"/>	Maximum Width	<input type="text" value="4"/>
Height	<input type="text" value="1"/>	Minimum Height	<input type="text" value="1"/>	Maximum Height	<input type="text" value="4"/>
Default Order	<input type="text"/>	Refresh Interval (In Minutes)	<input type="text" value="10"/>	Auto Refresh Interval (In Minutes)	<input type="text" value="10"/>
Widget Url	<input type="text"/>				
Widget Type	<input type="text" value="Client"/>				
Widget Builder Type	<input type="text" value="Client"/>				

Documents
FlowSheets
Favorites



EXAMPLE UMDAP DOCUMENT WIDGET

- Widget Builder Type = Document
- Document Code = UMDAP Financial Assessment, table presentation mode

Widget Detail

Widget Builder Type ←

Documents Builder

Document Code ←

Presentation Mode

Document Fields ↑

Table

Field

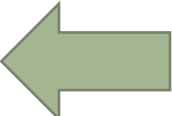
Display As

Table Name	Field Name	Display As
<input type="checkbox"/> DocumentCaliforniaUMDAPFinancialLiabilities	TotalGrossMonthlyFamilyIncome	Total Gross Monthly Family Income

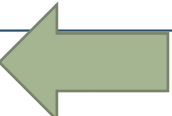
EXAMPLE UMDAP DOCUMENT WIDGET


- After selecting document code and presentation mode, choose from table and Field
- Enter Display As text and click on Insert, repeat for other tables/fields as needed

Widget Detail

Widget Builder Type: Documents 

Documents Builder

Document Code: UMDAP Financial Assessmer 

Presentation Mode: Table 

Document Fields

Table: DocumentCaliforniaUMDAPResponsibleParties

Field: RelationshipToClient

Display As: Relationship to Client

Insert

	Table Name	Field Name	Display As
X	DocumentCaliforniaUMDAPFinancialLiabilities	TotalGrossMonthlyFamilyIncome	Total Gross Monthly Family Income

EXAMPLE UMDAP DOCUMENT WIDGET

- After all fields are inserted, click Save

Widget Detail



Widget Detail

Document Code

Presentation Mode

Document Fields

Table

Field

Display As

Insert

	Table Name	Field Name	Display As
X	DocumentCaliforniaUMDAPFinancialLiabilities	TotalGrossMonthlyFamilyIncome	Total Gross Monthly Family Income
X	DocumentCaliforniaUMDAPResponsibleParties	RelationshipToClient	Relationship to Client
X	DocumentCaliforniaUMDAPResponsibleTeleph...	PhoneType	Phone type



ADD WIDGET TO ROLE DEFINITION

- Choose role and then Permission Type = Widgets and click on Granted

Role Definition ⚙️ Save

Roles Export Staff Roles Add Role...

- [Admin/Reception/Intake](#)
- [Administrator](#)
- [Adolescent Patient Portal](#)
- [Billing](#)
- [Care Coordinator](#)
- [CCM](#)
- [Claim Manager](#)
- [Clinical Supervisor](#)
- [Clinician](#)

Permission Utilities

Selected Role: Administrator

[Copy permissions from one role to selected role...](#)

[Remove permissions from selected role...](#)

[Grant complete access to selected role...](#)

Default Permissions for Selected Role +

Widgets All Apply Filter

Grant All Deny All

Permission Type	Parent	Permission Item	Not Allowed	Granted	Deny Item Removal
Widgets		UMDAP test	Deny	Granted	<input type="checkbox"/> ?





ADD WIDGET DASHBOARD (CLIENT)

- Go to Dashboard (Client) and click on button to Add Widgets




Client Dashboard

Upcoming Appointments(0)  






No data to display

Documents To Do(16)

Assessment	2022-04-18	In Progress
Narrative	2022-08-03	In Progress
Narrative	2022-08-10	In Progress
Narrative	2022-08-17	In Progress
Narrative	2022-08-24	To Do
Narrative	2022-08-31	To Do
Narrative	2022-09-07	To Do
Narrative	2022-09-14	To Do

Add Widgets 

Client Goals Progress
UMDAP test

    Save 

Add Widget

WIDGET DASHBOARD (CLIENT)

- Client dashboard with new UMDAP widget

Client Dashboard 👤 🗑️ + 💾 Save

Treatment Team

⚙️ 🗑️

Role	Name
<Unknown Team Role>	Brusa, Stan
Primary Clinician*	Williams, LaQuita
Program Assignment Staff: SUD Outpatient Adult*	Williams, LaQuita
Program Assignment Staff: Outpatient MH Adult*	Williams, LaQuita

Summary

⚙️ 🗑️

Name : Banks, Tara
DOB : 07/26/1980
Age : 42 Year
Home Address : 2407 S Cordial Lane Pacoima, CA 91331
Home Phone : (323) 518-2668

UMDAP test

⚙️ 🗑️

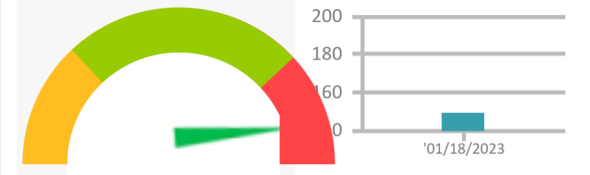
UMDAP Financial Assessment

	12/19/2022
PhoneType	30
RelationshipToClient	6781

BMI

⚙️ 🗑️

BMI : 29.29 Weight : 150.00



The BMI gauge shows a value of 29.29, which is in the red zone. The bar chart shows a weight of 150.00 for the date '01/18/2023. The y-axis ranges from 0 to 200.

Current Allergies(0)

⚙️ 🗑️

No data to display





California Mental Health Services Authority

AD-HOC REPORTING

PURPOSE - AD HOC REPORTING

- Allow a user to quickly generate reports with specific, configurable parameters
- Reports are created on an individual basis and pull a snapshot of the database for reporting so there is no interruption in the live environment

WHAT AD-HOC DOES NOT DO

- Does not allow report creation to be utilized by all users; Ad-hoc is set up on a user-by-user basis
- By default, results are based on user permissions, their patient's data, their data only
- Recode may be set up with the Role/RoleID of staff needing to collect data for all staff
- Recode xAdHocAdmin (Adding roles to access all Staff details in Adhoc Reporting tool)
- Uses the Role name and ID number for any role needing to see results from other staff
- Cannot update values/tables from the report

SET UP

- Permissions Set Up
- Navigate to Role Definition and select role that will use Ad-hoc Reporting

Default Permissions for Selected Role +

Screens All


Permission Type	Parent	Permission Item	Not Allowed	Granted
Screens	My Office	Ad-hoc Reporting	<input type="button" value="Deny"/>	<input type="button" value="Granted"/>

UNRESTRICTING STAFF INFORMATION – RECODE SET UP

- When querying Staff, Ad Hoc Reporting is built to inhibit Staff from seeing information pertaining to other Staff besides the one running the report. This can be configured to allow access to all Staff however, and is configured by Roles

Global Codes (27)

Active Categories ▼ Staff Role ▼ All Category Types ▼ [Apply Filter](#)

Active Codes ▼ Code Name 

Category	Category Name	Code Name	Sort Order
STAFFROLE	Staff Role	Administrator	0
STAFFROLE	Staff Role	Clinician	0
STAFFROLE	Staff Role	Clinical Supervisor	0
STAFFROLE	Staff Role	Nurse/Inpatient	0
STAFFROLE	Staff Role	Prescriber	0
STAFFROLE	Staff Role	UM	0
STAFFROLE	Staff Role	Health Maintenance Alert	0
STAFFROLE	Staff Role	Primary Care Physician	0

UNRESTRICTING STAFF INFORMATION – RECODE SET UP

- Make note of the Code ID and Code Name you will be adding to the Recode
- Navigate to the Global Codes and open the StaffRoles Global Code Category
 - Select the Code Name you need to add to xAdHocAdmin Recode


Code List Show Active Codes Only

		Code ID	Code Name
X	<input type="radio"/>	4000	Administrator
X	<input type="radio"/>	4001	Clinician
X	<input checked="" type="radio"/>	4002	Clinical Supervisor
X	<input type="radio"/>	4016	FRC Coordinator

RECODE DETAILS


- In the Recode Details section
 - Type the Role Name into the Code Name field
 - Enter a Start Date
 - Type the RoleID into the Character Code ID
 - Click Insert

Recodes (1)

XAdhocAdmin All Recodes Code Name  Apply Filter

Recode Category	Code Name	From Date	To Date
XAdhocAdmin			

Recode Details

Code Name	Clinical Supervisor	End Date	<input type="text"/>
Start Date	01/01/2023 	Integer Code Id	<input type="text"/>
Character Code Id	4002		

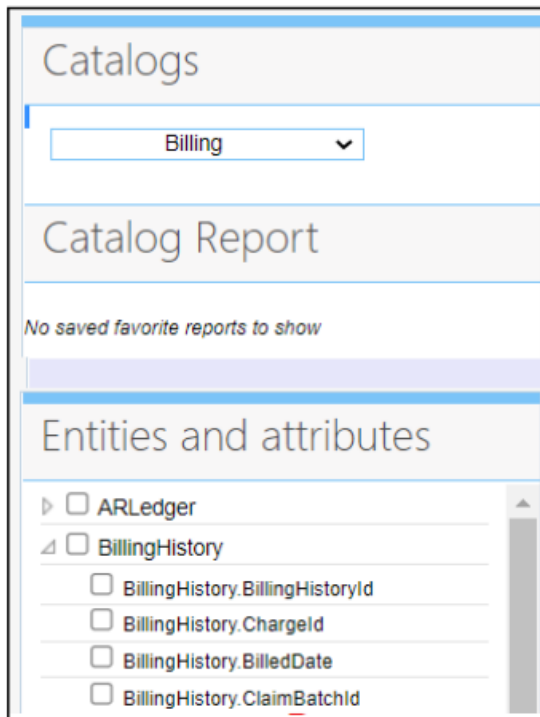
Insert Clear

CREATE A REPORT

- Open **Ad-hoc Reporting** by searching for “**Hoc**” in the GO bar or Search bar
 - Note: this will open a separate window so make sure pop-ups are enabled
- Select desired data fields to populate in Entities & Attributes:
 - For billing data tables, select Billing in the dropdown
 - For clinical data tables, select Clinical in the dropdown
- Select each desired option from the list under Entities and Attributes:
 - Entity - the entire data table
 - Attribute - specific columns within an Entity Multiple options can be selected across both Entities and Attributes

CREATE A REPORT

- Open **Ad-hoc Reporting** by searching for “**Hoc**” in the GO bar or Search bar
- Once all data tables and columns for reporting are selected, click the following button



CREATE A REPORT

- This will bring all selected data columns into the Result Columns section. From here you can add/remove columns, modify the name and alter how data will show on the report

The screenshot shows the 'Result columns' section of a report configuration tool. It features a table with columns for 'Expression', 'Title', and 'Sorting'. The first row is highlighted, showing 'ARLedger Chargeld' in both the Expression and Title columns, and 'Not sorted' in the Sorting column. A red box points to the 'Add column' button, another to the 'ARLedger Chargeld' title, and a third to the 'Not sorted' sorting option. A fourth box points to the dropdown arrow next to the first row's Expression column.

Expression	Title	Sorting
ARLedger Chargeld	ARLedger Chargeld	Not sorted
ARLedger FinancialActivityLineId	ARLedger FinancialActivityLineId	Not sorted
ARLedger FinancialActivityVersion	ARLedger FinancialActivityVersion	Not sorted

Callouts:

- Clicking allows name change (points to the title 'ARLedger Chargeld')
- Add a column from data selected in Entities & Attributes (points to the 'Add column' button)
- Change sorting within Result Columns (points to the dropdown arrow next to the first row's Expression column)
- Option for ascending or descending (points to the 'Not sorted' sorting option)

CREATE A REPORT

- Query conditions can now be added for specific columns in the Query Conditions section:

Query conditions

Select records where **all** of the following apply

ARLedger ARLedgerId is equal to 0

ClientCoverageHistory ServiceAreaId is equal to [enter value]

[+ Add condition](#)

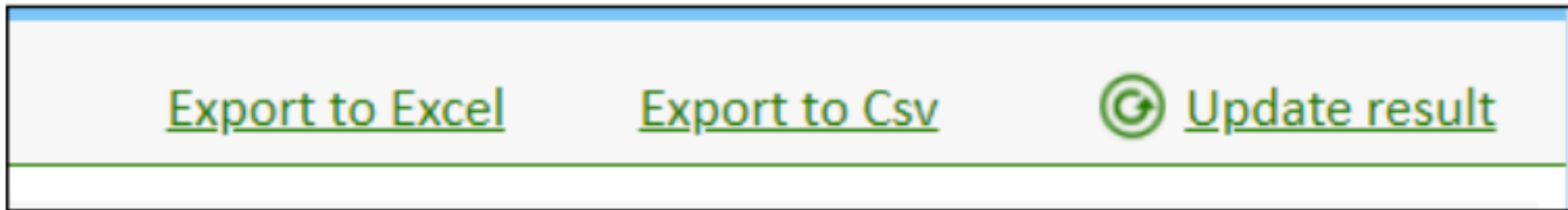
Check marks if condition is active or not

Click to add a query condition to the list

All green boxes can be clicked for configuration

EXPORT DATA

- Once all query conditions and column configurations are complete, click Update Result and report results will be displayed. Report results can be exported to CSV or Excel:

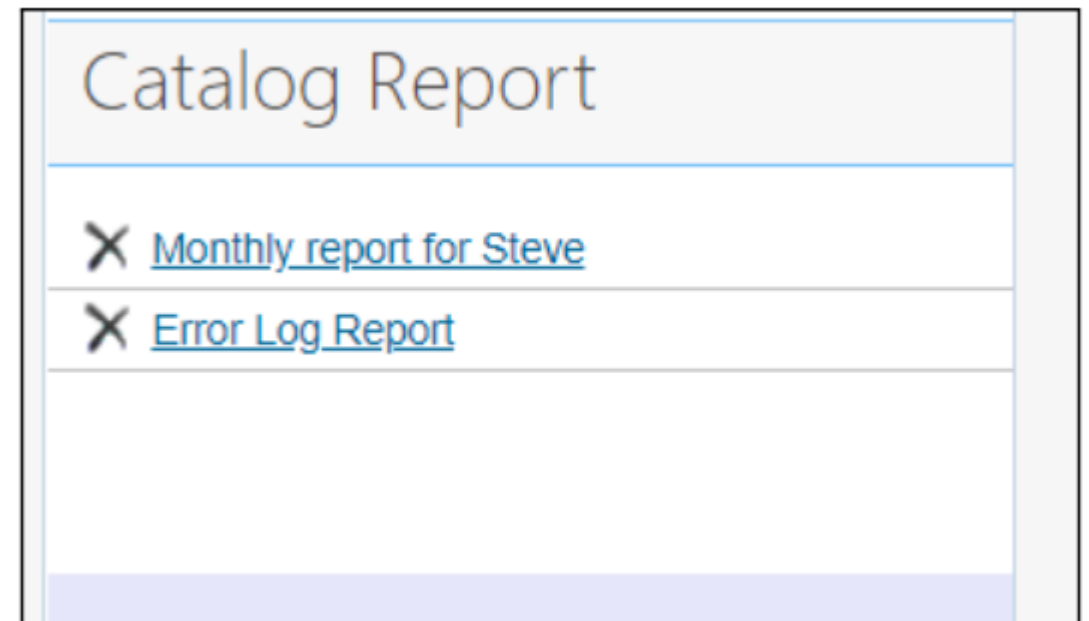


SAVING A REPORT

- Reports can be saved for easy access at a future date. Of Note - this is saved on an individual basis so another user cannot access your saved reports. To save a report:
 - Enter all report queries/conditions as per the steps above.
 - Enter the desired report name under Catalog Report Name at the top of the screen
 - Check the Favorite Report checkbox
 - Click Save
 - Saved reports will now appear under Catalog Reports:

SAVING A REPORT

- Reports can be saved for easy access at a future date. Of Note - this is saved on an individual basis so another user cannot access your saved reports. To save a report:
 - Enter all report queries/conditions as per the steps above.
 - Enter the desired report name under **Catalog Report Name** at the top of the screen
 - Check the **Favorite Report** checkbox
 - Click **Save**
 - Saved reports will now appear under Catalog Reports:



EXAMPLE

Catalog Report Name

Favorite Report

Save...

Clear

Catalogs

Catalog Report

- [staff test 1](#)
- [client test 1](#)

Entities and attributes

- DocumentCodes
- DocumentDiagnosis
- DocumentDiagnosisCodes
- DocumentDiagnosisFactors
- Documents
- DocumentSignatures
- Locations
- ProcedureCodes
- Programs
- ServiceDiagnosis
- Services
- Staff
- StaffClients

Result columns

Add column

Expression	Title	Sorting
Clients ClientId	Clients ClientId	Not sorted
Clients FirstName	Clients FirstName	Not sorted
Clients LastName	Clients LastName	Not sorted
Clients SexDescription	Clients SexDescription	Not sorted

Column sorting

Add sorting

Query conditions

Add condition

Select records where all of the following apply

Result

[Export to Excel](#) [Export to Csv](#) Update result

Clients ClientId	Clients FirstName	Clients LastName	Clients SexDescription	Clients SSN	Clients DOB
1	Client	Everyman	Male	111111111	1/1/2000 12:00:00 AM
1007	JaCoB	BAizE	Male	999999999	5/27/2003 12:00:00 AM
1008	Junior	Smith		234555667	6/9/1963 12:00:00 AM
1009	Service	Everyman	Male	134466564	6/12/2019 12:00:00 AM
1010	Sheelu	Ashok		223344556	3/9/1995 12:00:00 AM
1011	June	Billing	Female	999999999	2/14/1990 12:00:00 AM

SQL



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QUESTIONS?