

CalMHSA

California Mental Health Services Authority

CaIMHSA System Admin Day 2 – Reporting

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PRESENTED BY

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Agenda

- Introduction
- Data Ecosystem
 - Data Resources
 - Data Domains
- Shared Reports
 - Standard Reports
 - Custom Reports
 - Regulatory Reports
 - Ad-hoc Reporting
 - Data Quality (DQ) reports
- Shared Repository
 - Reporting SQL Scripts
 - Shared Reports
- Questions and Comments

Understanding current reporting.

- Data Resources used for Reporting.
- Reporting Tools used.
- Reports Development in-house or Professional Services.

Why Sharing Reports/Code is important?

- It is crucial for collaboration, uniformity and communication among County partners.
- Reduce redundancy and improve consistency.
- Shared Report/ SQL Scripts become a valuable resource for onboarding. Enables understanding of current codebase, coding practices and structure.
- Improve understanding of the context, purpose, accelerates the development process.
- Improves Cross-functional collaboration.
- Efficient means for problem resolution.

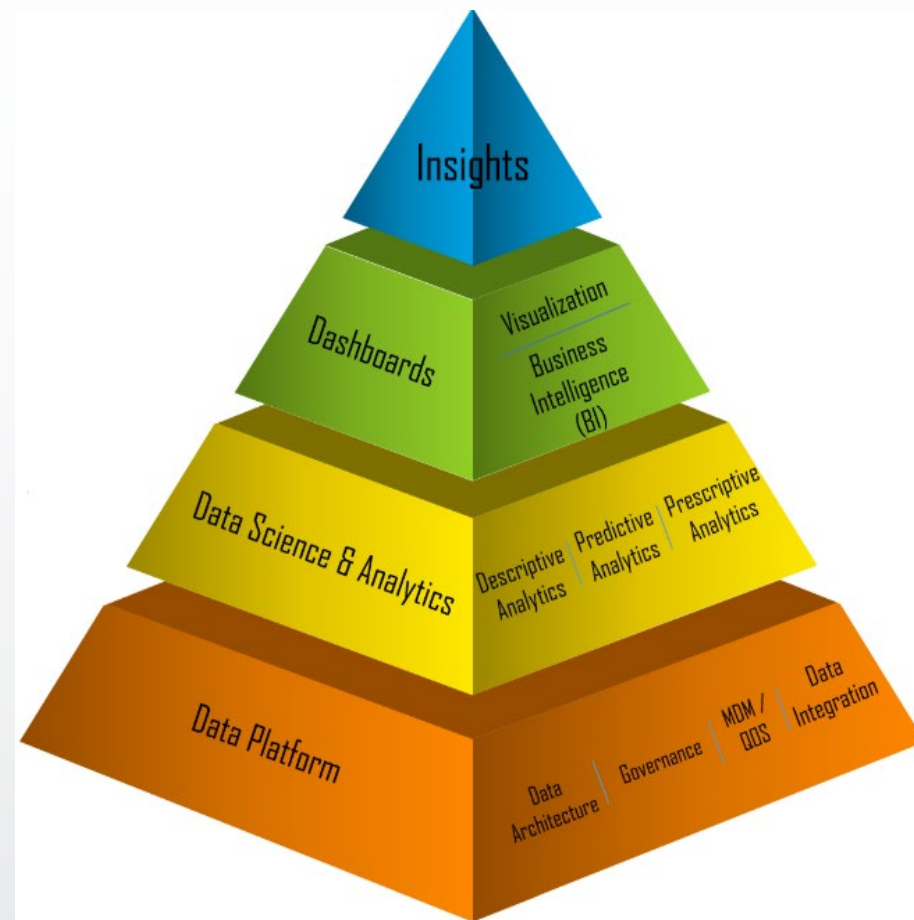
Data Ecosystem: Conceptual Architecture

Next steps: Develop Analytical Insights that provide actionable value for data driven decision-
Decision Support System (DSS)

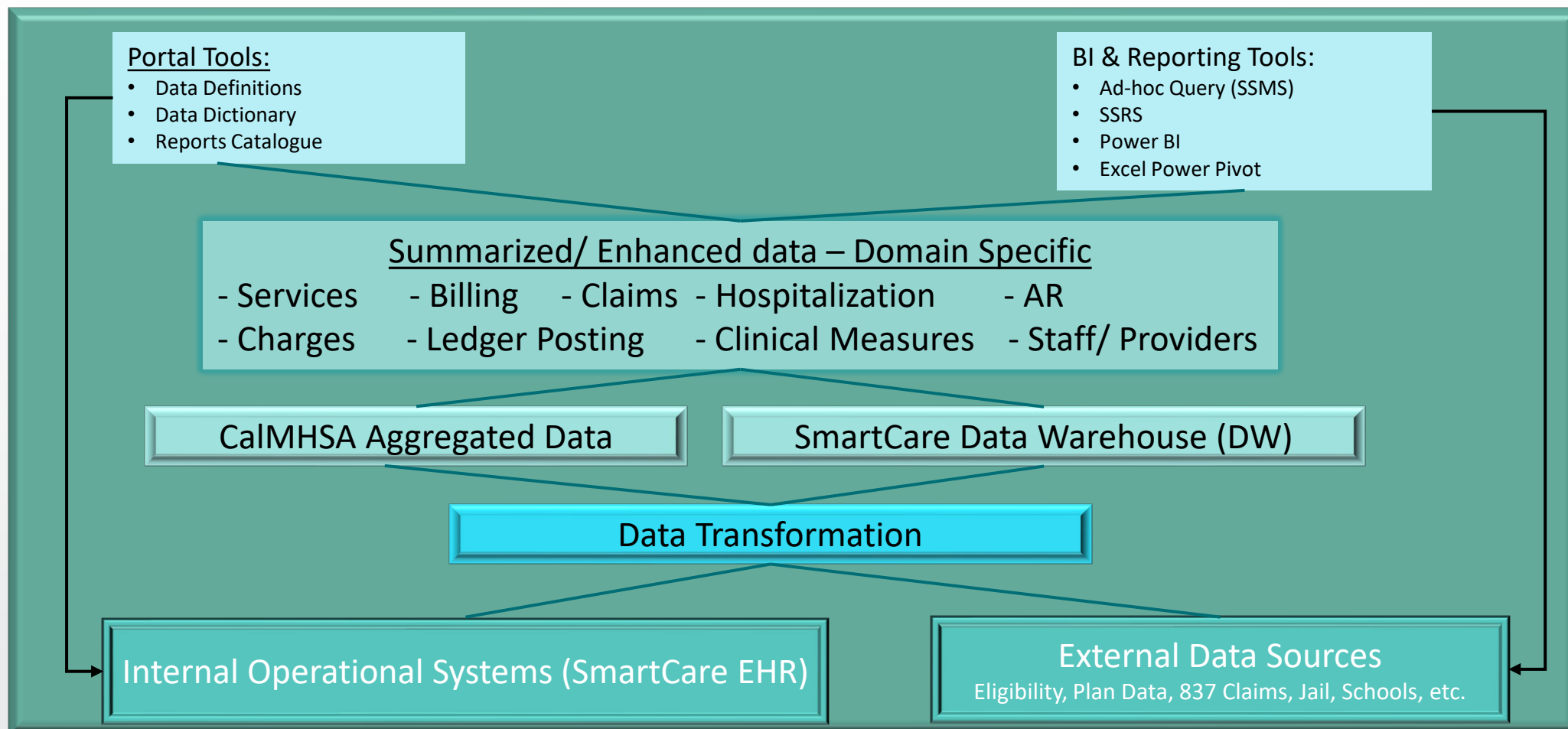
Tools: List Pages (SmartCare); SSRS, Power BI, Excel PowerPivot, SharePoint
D3 Dashboards; EHR Dashboard, SmartCare Reports, List Pages.

CalMHSA - County Collaboration:
Analytics – Insights – Reporting – Data Governance
Operation Reports; Standard Reports; Custom Reports; Executive Dashboards, KPIs, DQ Reports.

Data Sources: SmartCare – Prod; SmartCare DW;
CalMHSA Collective Aggregated Data Resources.



Data Ecosystem: Data Life Cycle



Shared Reports: Reports Folder of 2023.calmhsa.org

Report Documentation

- Datasets descriptions
- Parameters
- Sample report screen shots

The screenshot shows the CalMHSA website's Reports folder page. The browser address bar displays <https://2023.calmhsa.org/reports/>. The CalMHSA logo is prominently displayed at the top left, with the tagline "California Mental Health Services Authority" below it. To the right of the logo are two buttons: "CalMHSA Learn (LMS System)" and "Live Support Chat".

The main content area is divided into a left sidebar and a right main panel. The sidebar contains a list of navigation links: Home, Clinical Documentation, Substance Use Documentation, Prescriber Documentation, Nursing Documentation, Inpatient Documentation, Front Desk Documentation, Billing Documentation, Contract Provider Data Entry Only, QA/QI and State Reporting, Reports (highlighted with a thick underline), System Administration Documentation, EHR LMS Dashboard, SmartCare Downtime Forms, Data Conversion, and Frequently Asked Questions.

The right main panel is titled "Reports" and contains a sub-section "CalMHSA Report Documentation" with a list of report titles: CalMHSA Report Queue, Staff (Logged In) Service Detail Report, CalMHSA Special Populations Report, Staff Multiple Service Detail Report, CalMHSA CSIs Completed Report, CalMHSA Client Clinical Problems Report, CalMHSA Program Charge Errors Report, CalMHSA Services Missing Diagnosis By Program, CalMHSA Services Diagnosis Errors, CalMHSA Client Face Sheet, CalMHSA Staff Service Detail, Service Report Excel Format, CalMHSA User Role Report, CalMHSA BHQIP Screening Tools Report, CalMHSA BHQIP Transition of Care Tool Report, CalMHSA BHQIP Incoming MCP Referrals Report, CalMHSA Service Errors Report, and CalMHSA Staff Licenses Report. Below this list are two additional report titles: "Streamline Customer Access Request Form V1.4" and "EHR Week 9 PDF – Creating Reports in SmartCare Part 1".

Under "EHR Week 9 PDF – Creating Reports in SmartCare Part 1", there is a list of sub-topics: Summary – how to create reports using Visual Studio or Report Builder, How to connect to the SmartCare database using SQL Server Management Services, How to use certain functions such as get global codes by id, and Commonly used tables.

Shared Reports: Reports Folder of 2023.calmhsa.org

Sample report screen shot

- *No PHI, all data from CalMHSA TRAIN database*

Service From Date 1/1/2022 Service Through Date 10/31/2023
 Program Access Unit, Adult Crisis Residential

Staff: Peter Merna
 ID: 600

Behavioral Health Services

Staff Service Detail From 01/01/2022 Through 10/31/2023

Service Date	Client or Group Id	Client or Group Name	Program Name	Procedure Code Name	Travel Time	Document Time	Face to Face Time
08-03-2022	1056	Kobe Sudop	SUD Outpatient Adult	Case Management	0	0	30
Total:					0	0	30
08-17-2022	1056	Kobe Sudop	SUD Outpatient Adult	Case Management	0	0	30
Total:					0	0	30
08-19-2022	1056	Kobe Sudop	SUD Outpatient Adult	Case Management	0	0	30
Total:					0	0	30
12-19-2022	1078	Tara Banks	Outpatient MH Adult	Psychotherapy with Patient	0	0	60
Total:					0	0	60
12-20-2022	1078	Tara Banks	Outpatient MH Adult	Psychotherapy with Patient	0	0	60
Total:					0	0	60
02-09-2023	1078	Tara Banks	Outpatient MH Adult	Therapeutic Behavioral Services	0	0	60
Total:					0	0	60

Shared Repository of Codes: Reports – SmartCare User Group

Finished Reports section

- Completed reports (RDLs) shared by other county users
- Users can download and modify for their own custom report

The screenshot shows a project management interface for a group named 'Reports - SmartCare User Group'. It features a navigation bar with 'Overview', 'List', 'Messages', and 'Files'. Below this is a table of tasks. The tasks are organized into two sections: a main list and a section titled 'FINISHED REPORTS - Post Finalized Reports for Global Sharing; In...'. Each task row includes a status icon (checkmark), task name, comment count, assignee, due date, and a plus sign for more options.

Task name	Assignee	Due date	+
835 Query 1			
Hospitalization Data 1			
ModifiedDates differ between a screen's tables 3			
AD-HOC reporting options don't offer Client Address as a field? 8			
Core Data Dictionary 6.0 - Missing tables? 1			
Add task...			
FINISHED REPORTS - Post Finalized Reports for Global Sharing; In...			
Access Audit Report (who did what) 4 3			
Program Staff Services Report (totals of FTF/DOC/Travel 1 4			
Unsigned Documents by Program 5			
Program Demographics Report 2			
Progress Note Timeliness 13			
Special Population Members 4			
CANS Chart Report 4			

Shared Repository of Codes: Reports – Documents

CaIMHSA member portal screen shot

- Documents folder contains database documentation

The screenshot displays the 'Documents' section of the CalMHS A member portal. At the top, there is a green 'Add Document' button. Below it are filters for 'Earliest Date', 'Latest Date', 'Phase', and 'Category'. The 'Earliest Date' and 'Latest Date' fields are set to 'mm/dd/yyyy'. The 'Phase' dropdown is set to 'Select', and the 'Category' dropdown is set to 'EHR'. A search bar contains the text 'erd'. The 'Show' dropdown is set to '10 entries'. Below the filters is a table with the following columns: ID, Display Name, Categories, Phase, County Uploaded, Date Uploaded, and Actions.

ID	Display Name	Categories	Phase	County Uploaded	Date Uploaded	Actions
7705	SmartCare AR ERD	ehr, other	Phase 1	CalMHS A	2023-04-28 16:58:58	Download View Edit Deactivate
7706	SmartCare Documents ERD	ehr, other	Phase 1	CalMHS A	2023-04-28 16:59:52	Download View Edit Deactivate
7707	SmartCare Base Model ERD	ehr, other	Phase 1	CalMHS A	2023-04-28 17:01:00	Download View Edit Deactivate

Next Steps

- Share link to Dashboards from CaIMHSA Collective aggregated data resource – *Data validation in progress*
- Compile & Share Standard Reports catalogue
- Compile & Share Standard Reports SQL Scripts
- Collaborate with Counties in validating County SmartCare DW
- Enhance usage of Datapalooza for standardized process
- Kick-off Data Governance Program

Questions?



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