

# QI Supervisor Report Guide

3/22/2018



800 Team CSI	Data	
Description	This report can be used to identify which clients do not have CSI data. This report shows ALL CSI data for clients who have been admitted by your staff. It is organized by Admitting Practitioner. This information is required for all mental health programs.	This report shows all of the episode open Data shown below in red is required, if m Clere Episode 10 # # Program fract ASOC,Salinas Valley Team 1 Staff Name 2 & GI MAT Dependency Ur 2 & GI MAT Dependency Ur
How to read the report	<ul> <li>A. The sub heading displays the staff member name. The clients listed under each practitioner are open clients.</li> <li>B. All the red fields in the report need actions. The clinician can enter the CSI data by going into CWS→Clinician Menu→CSI Data and selecting the episode in the report then completing the fields. The goal is to not have any red text on the report.</li> </ul>	Staff Name     A Salma Oupstierr     A
Important Tips	<ul> <li>If you double click on the staff member name you will be able to isolate only that staff members list and print to hand to them. To go back to the main list click on the preview tab. The goal is to eliminate the red items</li> </ul>	11. AS Salinas Outpatient 8. AS Salinas Outpatient 5/14

		and COLUMN						
port shows all of the episode of the episode of the shown below in red is required.	if missing plea	need CSIdata ase go to CWS>Cl	inician Menu> CSI d	ata - then complete	fields			
,								
Episode # Program	first name	lastname	Mother's Name	school	Legal	fiscally responsible co.	Special Population	Ethnicity
C,Salinas Valley Team 1								
Staff Name								
2 CS FAST Dependency Ur				Salinas City	Voluntary	Monterey	(AB 3632) Individualized er	Unknown / I
1 CS FAST Dependency Ur				No School Info	Voluntary	Monterey	No special population serv	Hispanic or I
2 CS FAST Dependency Ur	1			No School Info	Voluntary	Monterey	No special population serv	Hispanic or I
2 CS FAST Dependency Ur				No School Info	Voluntary	Monterey	No special population serv	Hispanic or
2 CS FAST Dependency Ur				No School Info	Voluntary	Monterey	No special population serv	Hispanic or P
2 CS FAST Dependency Un				No School Info	Voluntary	Monterey	No special population serv	Hispanic or I
·			_					
Staff Name								
7 AS Salinas Outpatient				No School Info	Voluntary	Monterey	Welfare-to-work plan spec	Not Hispanie
11 AS Salinas Outpatient				No School Info	Voluntary	Monterey	No special population serv	Not Hispanie
3 AS Salinas Outpatient				No School Info	Voluntary	Monterey	No special population serv	Not Hispania
6 AS Salinas Outpatient	· [			No School Info	Voluntary	Monterey	No special population serv	Hispanic or
24 AS Salinas Outpatient				No School Info	Voluntary	Monterey	No special population serv	Not Hispania
6 AS Salinas Outpatient				No School Info	Voluntary	Monterey	No special population serv	Not Hispanie
4 AS Salinas Outpatient				No School Info	Voluntary	Monterey	No special population serv	Hispanic or
7 AS Salinas Outpatient				No School Info	Voluntary	Monterey	No special population serv	Hispanic or I
6 AS Salinas Outpatient				No School Info	Additional 14 E	Monterey	No special population serv	Not Hispanic
9 AS Salinas Outpatient				No School Info	Voluntary	Monterey	No special population serv	Not Hispanic
7 AS Salinas Outpatient	- 1			No School Info	Voluntary	Monterey	No special population serv	Not Hispanic
11 AS Salinas Outpatient	- I			No School Info	Other involunt:	Monterey	Governor's Homeless Initia	Not Hispanic
6 AS Salinas Outpatient	- 1			No School Info	Voluntary	Monterey	No special population serv	Not Hispanic
6 AS Salinas Outpatient	- 1			No School Info	Voluntary	Monterey	No special population serv	Not Hispanic
22 AS Salinas Outpatient	- 1			Carmel USD	Voluntary	Monterey	No special population serv	Not Hispanic
7 AS Salinas Outpatient	- 1			No School Info	Voluntary	Monterey	No special population serv	Not Hispanic
5 AS Salinas Outpatient	- 1		_	No School Info	Voluntary	Monterey	No special population serv	Unknown / I
10 AS Salinas Outpatient	- 1		_	No School Info	Voluntary	Monterey	No special population serv	Hispanic or I
11 AS Salinas Outpatient	- 1		_	No School Info	Voluntary	Monterey	No special population serv	Hispanic or I
8 AS Salinas Outpatient	- 1		_	No School Info	Voluntary	Monterey	No special population serv	Hispanic or I

## 801 – Open Clients for ASOC Salinas Teams

Description	This report will display a list of all open clients
	based on a birthday range entered by the user.
How to read	The information is grouped by the team, then by
the report	the admitting practitioner.
Important	You can drill down by clicking on the staff name
Tips	



Monterey County Health Department Behavioral Health Bureau 801 - Open Clients for ASOC Salinas Teams

#### Birthdays Between 1/1/1917 And 3/14/2018

ASOC, S	Salinas Valley Team 1				
EDEZA,	HILDA				
PATID	ClientName	Date of Birth	Age	Admit Date	Program
	107 18.1.210	_	63	1/20/1996	AS Salinas Outpatient
	10710.0801.A	10.00	59	3/17/2008	AS Salinas Outpatient
-	ALC: NO. OF CO. A.	17.000	74	7/1/2008	AS Salinas Outpatient
	LOTE OF A ROOM A	1.1.1	54	8/30/2011	AS Salinas Outpatient
1.10	Robert Landson	1.00.000	30	4/24/2012	AS Salinas Outpatient
100	1000 B. (1993) 1	10.007	60	1/16/2014	AS Salinas Outpatient
	100 Mar. 100.0	10.00	36	3/13/2015	AS Salinas Outpatient
	and a second second	1.00	51	9/29/2015	AS Salinas Outpatient
-	Mar. 101 - 102	1.8.197	60	11/24/2015	AS Salinas Outpatient
	CONTRACTOR AND	10.000	33	6/6/2016	AS Salinas Outpatient
- 10	11.1.1.1.1.1.1.1.1.1.1.1.1.1.1.1.1.1.1	100.000	64	9/21/2016	Contraction of the second
	10100.00.00.00	11.00	48	12/8/2018	AS Salinas Outpatient
	1.	1.0.7	29	1/17/2017	AS Salinas Outpatient
	AND COMPANY OF	10.00	32	2/16/2017	AS Salinas Outpatient
	11.01000	101100	49	3/7/2017	AS Salinas Outpatient
	810-101-1-0-80T1		54	5/11/2017	AS Salinas Outpatient
100	100000.000	10.000	28	6/19/2017	AS Salinas Outpatient
	CARTLE INCOME. 8	1000	43	6/29/2017	AS Salinas Outpatient
	NO. 101-10-10-00	10.000	58	10/12/2017	AS Salinas Outpatient
	Average Concernent	1.11.100	32	10/12/2017	AS Salinas Outpatient
	10 Mar. 44, 451 M	1.01	56	12/8/2017	AS Salinas Outpatient
	10.00 Mill. Ave. 10	1.1.1.1.000	48	1/16/2018	AS Salinas Outpatien t
-	And the second second	10.773	39	2/2/2018	AS Salinas Outpatient
-	in the second se	1.000	31	2/9/2018	AS Salinas Outpatient

MONTEREY COUNTY BEHAVIORAL HEALTH CONFIDENTIAL CLENT INFORMATION See California Welfare & Institution Code Section 5328 Title 42, Code of Federal Regulations or California Medical Information Act

Page 1 of

## 802 Team Treatment Plan Data by Month

Description	This report can be used to remind your staff of clients coming up for an annual and to view clients without a							
	treatment plan. This report organizes annual plans by							
	the month due. All clients need to have a finalized							
	treatment plan every year.							
How to read the report	A. This report is sorted by Month (Jan- Dec). All the clients under the month will be the clients that have plans starting that month. The clients							
	are displayed under the month of the original							
	date of coordination (see green widget in chart review to view this date).							
	B. You will want to pay close attention to the							
	following warnings on the report:							
	I. End Date Caution (green text)= this							
	means the clients treatment plan will							
	U The client does not have a treatment							
	II. The cheft does not have a treatment plan							
	III <b>Compliant=</b> Client heats a finalized plan							
	for the year							
	IV. <b>Duration in red</b> = The duration exceeds							
	365 days and needs to be corrected							
Important	- Every client should have one finalized							
Tips	treatment plan every year and one draft							
1	(working plan). A quick way to make sure all							
	clients follow this rule look at the last column in							
	the report Plan Status and just make sure you							
	see Final then Draft for each client.							
	- If you double click on the month heading you							
	can isolate all the information for that month to							
	print or just view. To go back to the main report							
	click on the preview tab							
	- If you notice a client that has been discharged							
	on this report make sure the Client Case							
	Coordinator has been issued an end date. This							
	will take this client off this report.							

GUNTTEN	Annua	Plans Organized b	oy Month	and Cas	se Coo	ordinator		
Team : ASOC,CSOC Team								
January								
Staff Name								
CLIENT ID			Plan Date	End Date	Duration	Plan Status		
	Plan Name:	2014 Plan 1	01/23/2014	12/31/2014	342	Draft		
	Plan Name:	This client does not have a trea	itment plan					
Staff Name								
CLIENT ID			Plan Date	End Date	Duration	Plan Status		
Compliant	Plan Name:	2014 Plan 1	01/02/2014	1/30/2015	393	Final		
	Plan Name:	2014 Plan 2	01/02/2014	1/30/2015	393	Draft		
Staff Name								
			Plan Date	End Date	Duration	Plan Status		
GLIENTID	Plan Name:	2014	01/01/2014	12/31/2014	364	Pending Approval		
Staff Name	Tian Name.	2014	01/01/2014	12/31/2014	304	T ending Approval		
Stall Marrie			Dia Data	E-1 D-1	Describer	Disc Original		
CLIENTID			Plan Date	End Date	Duration	Plan Status		
Compliant	Plan Name:	2014	01/01/2014	12/31/2014	364	Final		
	Plan Name:	2014-A	01/01/2014	12/31/2014	364	Draft		
		0044	Plan Date	End Date	Duration	Plan Status		
	Plan Name:	2014	01/01/2014	12/31/2014	364	Pending Approval		
			Plan Date	End Date	Duration	Plan Status		
Compliant	Plan Name:	2014	01/31/2014	12/31/2014	334	Final		
	Plan Name:	2014-A	01/31/2014	12/31/2014	334	Draft		
			Plan Date	End Date	Duration	Plan Status		
Compliant	Plan Name:	2014	01/30/2014	12/30/2014	334	Final		
	Plan Name:	2014-A	01/30/2014	12/31/2014	335	Draft		
Staff Name								
CLIENT ID			Plan Date	End Date	Duration	Plan Status		
Compliant	Plan Name:	2014	01/01/2014	12/31/2014	364	Final		
			Plan Date	End Date	Duration	Plan Status		
Compliant	Plan Name:	2014	01/22/2014	12/31/2014	343	Final		
February								
Staff Name								
CLIENT ID			Plan Date	End Date	Duration	Plan Status		
	Plan Name:	2014 Plan 1	03/01/2014	2/28/2015	364	Draft		
			Plan Date	End Date	Duration	Plan Status		
Compliant	Plan Name:	2014 Plan 1	02/26/2014	1/30/2015	338	Final		
	Plan Name:	2014 Plan 2	02/26/2014	1/30/2015	338	Draft		

### 803 Team 72 Hour Rule

Description	This report can be used to monito	or team's compliance				
	with completing notes within 72 work hours of service					
	date. This report only calculates 72 hour compliance					
	based on work hours. You can clic	ck on the practitioner				
	to see additional details about no	tes written				
How to read	A. This report is sorted by cl	inician's assigned to				
the	your team					
report	B. It has a count of notes wri written three work days a	ften, count of notes				
	and a percentage of notes	written after 72				
	business hours.					
	C. This report also shows pe	rcent of notes tied to				
_	an Evidence Based Practic	ce				
Important	- Double click on any of the	numbers listed under				
Tips	the clinician name to view	v the details. This will				
	give you a list of the cli	ents that account for				
	entry days difference and	service, date of note				
	- We usually run this repo	t for the provious full				
	month because then it	reflects the very late				
	notes.	teneeus ene very late				
	- The report date paramet	ters are based on the				
	date of service not the dat	e of data entry.				
	- Running the report for a	recent time frame will				
	show compliance because	the late entry services				
	have not yet been entered	l.				



Monterey County Behavioral Health Count of Notes Entered 72 Business Hours After Service Date Range 1/1/2014 to 2/1/2014

Staff Name 1		Percent of Notes Tied to an Evidence-Based Practice
Count of all notes written in the time period Count of notes written three work days after date of service Percentage of notes written after 72 business hours	34 8 24%	-None 100%
Staff Name 2		Percent of Notes Tied to an Evidence-Based Practice
Count of all notes written in the time period Count of notes written three work days after date of service Percentage of notes written after 72 business hours	24 5 21%	-None 100%
Staff Name 3		Percent of Notes Tied to an Evidence-Based Practice
Count of all notes written in the time period Count of notes written three work days after date of service Percentage of notes written after 72 business hours	15 6 40%	-wone100%
Staff Name 4		Percent of Notes Tied to an Evidence-Based Practice
Count of all notes written in the time period Count of notes written three work days after date of service Percentage of notes written after 72 business hours	24 0 0%	-None 100%
		Percent of Notes Tied to an Evidence-Based Practice
Count of all notes written in the time period Count of notes written three work days after date of service	44 5	-wone 100%
Percentage of notes written after 72 business hours	11%	

804 Team List	
Description	This report can be used to verify the correct staff members are assigned to your team. This report drives which staff members you will see in other reports under your team.
How to read the report	<ul><li>A. Look for your team name (scroll down or go to the next page for more team names)</li><li>B. Look at the staff listed under the team to verify names, titles, start date and end date are accurate</li></ul>
Important Tips	<ul> <li>Notify the QI team when there is a new employee or an employee has transferred to another/your team (they will need the date details such as date of transfer, or start date, or end date)</li> <li>Notify the QI team if your staff member has an inaccurate title by submitting an error report under the Staff Assignment type</li> </ul>

-

#### MONTEREY COUNTY BEHAVIORAL HEALTH

Staff Organized by Team

Staff ID	Staff Name	Title	Intern	Start Date	End Date
	10001701/001	The Philippe			
100057	ACCOUNTS OF TAXABLE IN	weiten weiten weiten	181	1074074534	
1061577		the filling of the standards	101	127327884	
(98883)	CONTRACTOR LANCED FROM	APP MANYARY AND MANYA		1273278844	
Manage	ement Team				
(05383)	101000000000000000000000000000000000000	1799 (Scontant) Termations		10117007	
Superviso	ry team	THE R. P.LEWISCH.		of the boston	
100100	Second Control of Cont	Sector Conception Conception	100	Telepinese	
10000000	MATTERS CANNAGES	(and a second contract of	-		
(mining)	and the second s	And a second sec		1012210800	
00011040	A CARGO AND A CARG	Table 1 and Table 2 and 1 allow 2 and 1 allow	ine .	111110000	
100.000	COMPANY LANDING	ing a line of the second state of the	181	mits lance	
10002001	STREAM OF LANSA	100 - 6 - 6 - 100 - 100 - 100 - 100 -	101	11112000	
Superviso	ry team	Sector Sector and			
	AND ADDRESS OF THE OWNER OF		441	1070470020	147970040
Supervisor	ry team				
100100	and the second	The second second second second	- Max	12 72 22000	
1005770	INCOME. IL CORD.	Ander Anderson and Antonio Press, An	100	111/2009	
1001331	TRAFFIC MILLION AND	Rectainent	1941	10000100000	(finition)
1001471	10.100.000	a Television and Colorad Television	101	to by Contract	
	INVESTIGATION (AND US OF	VARIABLE CONTRACTOR ( MALERAL ( MAL	-	1777000	
1061361	CONTRACTOR AND INCOME.	APP - MARTING AND INCOME.		13737888	-pitediment
	CONTRACTOR OF CARE	The other Research in the state of the		and a state of the	

### 805 ProgramDemographicDATA

How can it be used?	This report can be used to view demographic data for the selected programs
Description	This report shows gender and ethnicity breakdown. As well as age breakdown, count of current open clients, average age, and age range served



Monterey County Behavioral Health Program Summary:

Number of clients currently active in program: 19 Average Client Current Age: 33 Current Age Range Served: 20 to 54

GENDER

ETHNICITY



remare	DIACK	0	0.0	1	10/0	1	12/0
	Hispanic	0	0%	5	83%	5	62%
	White	2	100%	0	0%	2	25%
Male	Asian / Islander	0	0%	1	12%	1	9%
	Black	0	0%	1	12%	1	9%
	Hispanic	1	33%	3	37%	4	36%
	White	2	66%	3	37%	5	45%
Total		5	100%	14	100%	19	100%

### 806 Team NonBillable Time by Clinician

Description	This report can be used to monitor what is entered as non billable time.
How to read the report	A. This report is by staff member. It displays non billable time by date with notes.
Important Tips	- If you double click on the staff member name you will be able to isolate only that staff members list and print to hand to them. To go back to the main list click on the preview tab

#### Monterey County Behavioral Health Staff Non-Billable Time Report

Use this report to monitor 1. what staff is entering 2. total non-billable time This report is based only on appointment scheduler data, if you find an error please enter it into the Error Report (CSW -> CLINICAN MENU -> Error Reporting)

<b>T</b>				
lear	n Name	1000 1100		
Staff:	Staff Name			Total Non Billable time: 3,252.00
1/2/2014	803	Vacation/Sick	480.00	100
/3/2014	803	Vacation/Sick	480.00	44
/6/2014	802	UR/QI Review	105.00	Tearri Broak ayan daan
1/6/2014	811	Outreach & Engagement	7.00	Start Special (1971). Interest off come manager in 1000 study (1971) supporting support off-pathing for communities off-pathing in the pathing mathematic system strong come (1988) from the later of the pathing of the pathing of the later of the formation of the strong of the pathing of the pathing of the later of the formation.
1/7/2014	811	Outreach & Engagement	5.00	177746 Stran Second collect addates a Second Collector Statements
1/7/2014	802	UR/QI Review	90.00	Prog./do./Add//Tumbi./Tonug. Visided/apoproxima-
1/8/2014	811	Outreach & Engagement	10.00	(Sour Sans)/14744 - artialit millar spanistic regarding, and for (Souris), although the line - gener instruct Materian into the try population instruction regard that makes which articles descend to the Souris for the solid format information Maxis.
1/9/2014	802	UR/QIReview	150.00	Tear Medica
1/10/2014	811	Outreach & Engagement	210.00	Tarana, sekantara (1966) (secant' anali nalar ta Marthana fa maji program naganti tempat nating nagang anti Marthan tarang ili secantari sekantara anti nagana di Arabata aganti
1/13/2014	806	Trainino	480.00	Hereingener fan Traurian
1/14/2014	811	Outreach & Encacement	60.00	Progestel Aven / Service Stronger Heart I No.
1/16/2014	802	UR/QIReview	120.00	Tearrineeling
1/22/2014	811	Outreach & Encacement	30.00	2.188271 - Stagado, Moras - Partinet and adriationalist for intrinae regarding instantion with respect (Section 2014) and the through and adriance - Proceeding instantial contact surface instantian for in and - instantian age - Windfill are approach for instantial interpret for in and instantian age - Windfill are approach for instantial interpret for instantial instantian age - Windfill are approach for instantial interpret for instantial instantian age - Windfill are approach for instantial interpret for instantial instantian.

### 807 Team NonBillable Service by Code

Description	This report can be used to monitor what is entered as					
	non billable. You can also use this to see how much					
	time your staff is spending in each non-billable type.					
	Example : Sick or training					
	This report organizes staff non-billable time by service					
	code (non-billable type)					
How to read	A. This report is sorted by clinician					
the	B. You will see the total time the clinician entered					
report	for each of the different non billable categories					
	C. The total in the blue heading is the total non-					
	billable time entered for the date range you					
	selected					
Important	- If you double click on the staff member name					
Tips	you will be able to isolate only that staff					
	members list and print to hand to them. To go					
	back to the main list click on the preview tab.					
	- Once you have isolated the staff name you can					
	double click on one of the total number of non-					
	billable time and that should open up an					
	additional tab that will display the details for					
	that service type.					
	- This can help you see how much time a staff is					
	spending sick or in training.					

#### Monterey County Behavioral Health Staff Non-Billable Time Report

Use this report to monitor 1. what staff is entering 2. total non-billable time This report is based only on appointment scheduler data, if you find an error please enter it into the Error Report (CSW-> CLINICAN MENU -> Error Reporting) Click on the Code Title to see detailed information.

#### Team: Team Name

Staff:				Total Non Billable time: 2,237	
	Indirect Service	total time billed in this code	1,202		
	Supervision	total time billed in this code	105		
	Training	total time billed in this code	75		
	UR/QI Review	total time billed in this code	375		
	Vacation/Sick	total time billed in this code	480		
Staff:				Total Non Billable time : 1,725	
	Supervision	total time billed in this code	720		
	Training	total time billed in this code	540		
	UR/QI Review	total time billed in this code	315		
	Vacation/Sick	total time billed in this code	150		
Staff:				Total Non Billable time : 3,690	
	Indirect Service	total time billed in this code	1,500		
	Supervision	total time billed in this code	120		
	Training	total time billed in this code	1,470		
	UR/QI Review	total time billed in this code	420		
	Vacation/Sick	total time billed in this code	180		
Staff:				Total Non Billable time : 1,710	
	Supervision	total time billed in this code	540		
	Training	total time billed in this code	720		
	UR/QI Review	total time billed in this code	450		
Staff:				Total Non Billable time : 3,090	
	Indirect Service	total time billed in this code	300		

### 808 Team Clients without diagnosis

Description	This report can be used to monitor which clients are missing a diagnosis and what would be the potential loss if the diagnosis is not entered. This report shows clients open to your team who do not have a diagnosis. Clients must have an admission diagnosis in order to bill for services. It also shows the potential money loss due to services being provided with no diagnosis.
How to read the report	<ul><li>A. This report is sorted by admitting practitioner</li><li>B. This report displays the clients who are missing an admission diagnosis. This section also shows</li></ul>
	the last date of service and the potential loss for each client
Important Tips	<ul> <li>Pay close attention to the episode number. The client may have multiple episodes open however the episode listed on the report is the episode with the missing admission diagnosis.</li> <li>If you double click on the staff member name you will be able to isolate only that staff members list and print to hand to them. To go back to the main list click on the preview tab.</li> <li>All clients must have an admission diagnosis date should default to the date the episode opening date</li> </ul>

Team Clients Without A Diagnosis -This report is based on the admitting practitioner field of the episode admission screen. -Each episode needs a diagnosis. Pay special attention to the episode number that is missing a diagnosis -Under diagnosis type each client needs to have an ADMISSION diagnosis or services can not be billed (see the potential loss column on right)

-Once the admission diagnosis is screen is completed for this epside the client will be removed from this report. -You may find that you have completed a diagnosis; remember we must have a diagnosis with "Admission Type" and the date needs to match the admission date

Diagnosis		
ıl Diagnosis	Type Of Diagnosis Admission Discharge Onset Updal	te 9
ıl Diagnosis ıl Diagnosis	Date Of Diagnosis 08/27/2012 T Y	

#### ASOC CSOC TEAM

Staff	Name	<b>;</b>					
PATID	EP#	Admit Date	Disch Date	Last Date of Service	Admitting Practitioner	Program	Potential Loss
	5	5/7/2014	5/9/2014	5/9/2014		viccess to Treatment Salinas	\$ 1,812.36
Numbe	r of cli	ents without	a diagnosis:	1		Total Potential Loss:	\$1,812.36

### 809 Supervisory UR List

Description	This report may assist you in viewing clients that have received a UR based on a selected date range, completed by the Supervisor and their team
How to read the report	<ul> <li>A. Displays Supervisor name with a total client count of all UR's completed by their team.</li> <li>B. Displays Staff name with a client count for each client reviewed regardless of review status.</li> <li>C. Displays <ul> <li>a. client ID</li> <li>b. review type</li> <li>c. date reviewed</li> <li>d. review status</li> <li>e. program</li> </ul> </li> </ul>
Important	You may double click on staff name to drill down and
Tips	view that specific staff individually.



Monterey County Behavioral Health 809 Supervisory UR List Date Range 1/1/2017 to 3/14/2018

CARR,KACY		PATID	Rev	iew Type	Review Date	Status	Program	Total :	5	
BATE S, REGINA								Total:	3	
1000		12/05	/17	Draft	Access To T	reatment	Coastal Region			
10000		12/22	/17	Final	Access To T	reatment	Coastal Region			
0.047700	Annual	12/27	/17	Final	Access To T	reatment	Coastal Region			
O'LEARY,LINDSE	Y							Total :	1	
1.000	Admit	08/29	/17	Final	Access To T	reatment	Coastal Region			
ROSA,ENA								Total:	1	
1000		12/05	/17	Draft	Access To T	reatment	Coastal Region			

### 810 ClientsWithoutServices

Description	This report can be used to view clients who are not							
	receiving services and may need to be discharged							
	This re	This report is organized by program and admitting						
	practit	ioner. Please review the clients in your program						
	who ar	e listed as not receiving services.						
How to read	А.	This report is sorted by admitting practitioner						
the	B.	This report displays all clients open with no						
report		services. It also displays the date of admission						
		and the episode number.						
Important	-	Clients who are listed as not having services who						
Tips		have been opened for greater than 60 days						
		should be considered for closure.						
	-	This report will help you to see clients who are						
		not being served or should perhaps be closed						
	-	Additionally this is a tool can show who is						
		behind in their documentation						

#### Current Open Clients That Do Not Have Services Entered Sorted By Program, Admitting Practitioner and Episode Opening Date

Client ID	<u>Client Name</u>	EPISODE #	Admit Date	
Program:	AND CONTRACTORY CARDS	LIBRO PERSONNEL		Count of Clients: 8
Admit Practitie	oner Name:	#	count of clients: 8	
1922241	MILLINGS ARREST		1002011001	
-041211	March 1998		10224240	
103135		181	100100010	
-01784-	STATISTIC PROPERTY.		00000011	
1007340	CANFERT, SCINE.		CONCERNENT &	
1000111	Herritiks : Billing	181	110100000	
100000	AND DESCRIPTION OF THE OWNER OW	381	10011-0001-01	
1000001	CONTRACTOR ADDRESS	181	10071220211	
Admit Practitio	oner Name:		count of clients: 3	
Admit Practitio	oner Name:		count of clients: 3	
10011			10010010	
169299	HARTS, CORRECTION OF		1000 1000 100	
1230001	strat antidate		100200710	
Program:	NE THE TRANSPORT	100-2200-0		Count of Clients: 2
Admit Practiti	oner Name:	<b>HARTHAN</b>	count of clients: 1	
1286271			1000011	
Admit Practitie	oner Name:	INSTAL AND A	count of clients: 1	
78385	NUMBER OF STREET		100203044	

### 811 Staff Services by Billing Code

Description	This report can help you view the amount of minutes a staff member is billing under each service type This report shows the billable time organized by service code
How to read the report	A. This report displays the service codes the staff member billed to. It also displays the total minutes billed under that service code and the average minutes per session.
	B. Displays total minutes billed for the selected time frame and a total of hours and minutes at the bottom of the report
	C. This report only displays billed minutes through the clinical progress note or group progress notes. (Does not include 800 code information entered into the scheduling calendar)
Important Tips	<ul> <li>This will help you to evaluate the amount of billable time your staff has on a monthly basis</li> <li>Double click on the service code (number) to view the billing details that contributed to the minutes in that service code. To go back to the main report click on the preview tab</li> </ul>



Monterey County Behavioral Health Staff Productivity Broken Down by Billing Code

Staff: Staff ID#	810-1804)	Report Date Range: 1/	1/2014 to 2/1/2014	
Service Code: 3	801	Linkage/Brokerage	Total Minutes Billed 345	Average Per Session 49
Service Code: 3	330	Non Billable Activity	20	10
Service Code: 3	351	MH Group Rehab Counseling	1,396	70
Service Code: 3	381	Mental Health Rehab	2,962	165
Service Code: 3	391	Plan Development	20	20

Total Billed Minutes = 4,743 Hours and Minutes = 79:3

### 812 Team Missing UMDAP

Description	This report shows UMDAP information for all clients assigned to the case coordinator and can be used to view clients that need their UMDAP information entered or updated					
How to read the report	<ul> <li>A. This report is sorted by case coordinator</li> <li>B. It displays the clients assigned to that case coordinator. Pay close attention to those who say "Expired UMDAP" in red text. Those clients need to have their UMDAP renewed.</li> </ul>					
Important Tips	- On the 301 missing UMDAP report on the clinician's caseload reports they see all of their clients (including clients missing the UMAP)					



Monterey County Behavioral Health 812 Team UMDAP Information To Complete the UMDAP go to CWS ->Clinician Menu-> Family Registration (UMDAP) to complete the UMDAP. If Family Registration Incomplete is shown on this report you must complete the Family Registration prior to the UMDAP. Please see Chapter 6 of the My Avatar User Guide on the Website for Information on completing this step

se Coordinat	tor:	ender on an		4				
C	lient ID	Family ID #	UR Month	Admission Date	UMDAP Start Year	UMDAP End Year	Last Date of Service	Calculated UMDAF Annual Liability
19	31981	1897	101124444	1111221000	WHITE ALL	101114414	Heladian	100.000
	10.000	187	and the state	BETTER FREE	INCOME FAIL	HIFT METAL	HILF FAIL	101100
10	8484	18.0.1	100110000	100000000000000000000000000000000000000	10000000000	14478674-	HEFAL THE	101100
	4194	1.812	International Very	internal filters	1000704-140	1000 7 8 4 7 8 4	THE THE TAP	10.100
e Coordinat	tor:	A.L. A.L. B.		20				
C	lient ID	Family ID #	UR Month	Admission Date	UMDAP Start Year	UMDAP End Year	Last Date of Service	Calculated UMDA Annual Liability
19	1007	1285	144744190	10030470831	1000004141	1000734745	IRE/REFAT	15,100
	41000	1001.	1000100000	100010010000	HILFING FAR	INCOMPTANT.	HEISETAN	101100
	4141	1.000	110/06/40	111070070000	married Lat.	HIST BET AL	1000 1000 1000	100 1000
	4944	12.82	10000000000000	10010010000	Harris Lan	HILFALFAL	100120140	100 1000
	0.1.0101	12841	and all the particular of	1001704/1001	HARPING FAIL	HIGT & A FROM	HE HETAL	12.198
	3184	79.80	10122034 1 001	1129127882	- Belleville	Herine Lan	HALF RE LAN	120100
	3184	22.4.81	10474470	10474478811	HET-LET AL	HEISEIAN	HEIRE'S.	101100
	3180	188	100730100	007007001	Lagrand Law	HE THE LAD	1000700740	10.100
	7984	Balling / Bage in adding of the output line	101220341140	10121012 101000			INCOME LAN	
	7184	16.811	1000110001001	102/02/081	BORATA-	100711745	102734745	17738
	78231	128181	100744007	1120077881		112702745	100100140	10.100
	8851	127.00		HETELTON:	101205121-000	100070073-	100734140	127.0081
	0080	1887	100740781	100730700000		100700740	HET-LETAN	12 1381
	1100	11000		1121-2789-2	100000000000000000000000000000000000000	111278614-	100100100	1011100
	A / 911	147.84	100100101	887927882	110000	1400000000	HEFE AL	10.108
18	0100	10000	- mather 2004	Harder Friday	10070014	100100140	100100100	177.000
	1015.1	100.00	WIFFARTA:	1177327881	WIFFARTA:	HIT ALLAN	HILLING LAS	10.198
	101010	10.00			metaeta	HE ! SETAN	HALF HE FAIL	10.000
	8473	1847	INCLUSION.	STREET STREET	INCLUSION.	HEINETAN	1000730740	10.100
	9091	1.000					1000 1 446 1 410	10010-000
e Coordinat	tor:	AA. UT ; UAR HIGH		12				
C	lient ID	Family ID #	UR Month	Admission Date	UMDAP	UMDAP	Last Date	Calculated UMDA
					Start Year	End Year	of Service	Annual Liability

813 Clients w/c	case coordinator	by program
-----------------	------------------	------------

Description	This report can be used to view clients that are missing a case coordinator. It is organized by program.
How to read the report	<ul><li>A. This report is organized by program</li><li>B. Below that is a list of the clients missing a case coordinator</li></ul>
Important Tips	<ul> <li>To assign a case coordinator go to "Client case coordinator" form and assign a start date and a clinician.</li> <li>Only one active case coordinator is allowed per client</li> </ul>

of the late	AND DEP	68-	Total: 2			
lient ID	Episode #	Admission Date	Admitting Practitioner	Attending Practitioner	Last Date of Service	Client Name
11796	_	10070021061	(我我帮助你的名)	10.000000000000000000000000000000000000	1007-11708-01	10110-1-001100
		AND DESCRIPTION OF	10.0000/00/00	(我们的我们的)(1)		ALC: NO. OF THE PARTY OF THE PARTY OF
	h and names		Total: 1			
lient ID	Episode #	Admission Date	Admitting Practitioner	Attending Practitioner	Last Date of Service	Client Name
+++++++++++++++++++++++++++++++++++++++		1001-011-010-01	BURNING STATISTICS AND IN	100.000000	1001-011-010-01	INVESTIGATION OF
1861010			Total: 2			
lient ID	Episode #	Admission Date	Admitting Practitioner	Attending Practitioner	Last Date of Service	Client Name
1185		101111111111	188867.0000	101010301000000000000000000000000000000		HARDINE ADDARD
9111		1007101061	101100000-00010000-000	THE REPORT OF THE PARTY OF THE	10073070610	ANNAL CR. TANK (B.C.)
1000	emit com		Total: 1			
lient ID	Episode #	Admission Date	Admitting Practitioner	Attending Practitioner	Last Date of Service	Client Name
1000		-00/02/06/1	1010.00.000000	10122010	10070070101	BUILDING BRIERS
			Total: 2			
lient ID	Episode #	Admission Date	Admitting Practitioner	Attending Practitioner	Last Date of Service	Client Name
1008		1007171001	NUTRI BRI CAMPAGE	DAMAGE - HINSTOPPICS	100100200000	Brenthille BF F MARKENS
60147		101110110101	ALCO BRID CONTRACTOR	HE PRINT .	101100101010	10-0100-01-000
	annen anne i	ena:	Total: 1			
lient ID	Episode #	Admission Date	Admitting Practitioner	Attending Practitioner	Last Date of Service	Client Name
11100		1007107061	1001001/0110011	10123110		10110-00100
	ters ( three ) strong		Total: 4			
lient ID	Episode #	Admission Date	Admitting Practitioner	Attending Practitioner	Last Date of Service	Client Name
11111		1001-001-001	IDJURGE JAMPET	(Ball Barris)	101-01-01-0	10001555.0400000
1111		- March & Street & Street	1010087-00074	100.00000		

## 814 Team Admitting Practitioner Report

Description	This report can be used to view the clients opened to
	each practitioner in your team
How to read the	A. This report is sorted by admitting practitioner. It displays a list of clients opened to that
report	practitioner.
	B. It also displays the client case coordinator, psychiatrist, admission date and last date of service
Important Tips	<ul> <li>This report gives you a count of open clients for each practitioner this helps to give you an idea of how many clients each practitioner has open</li> <li>You can also look at the last date of service and if the client has not received services then this might be a client to consider closing</li> </ul>



Monterey County Behavioral Health 814 Admitting Practitioner Report This report shows all open client episodes that a staff member is the admitting practitioner for sorted by client name

lient ID	Client Name	Program	Case Coordinator	Psychiatrist	Admission Date	Last Date o	of Service
Team :	Child, discussion and	Reality and a Team					
Admitti	ing Practitioner:	COLUMN TRANSPORT	Distinct Count of Curren	nt Open Clients	: 22		
1000	WARDER STREET, STREET, ST.	A THE CONTRACTOR	100000-00000000-000000	IN COSTS	100103-0010-001	(Brownskin)	
10011100	10000000000000000	- Contract of the second statement of the second se	10.500 Attack 11 (0.60,1000)	Station.	1.000000000000	description in the	
(ALTERNAL)			100 10000 100100	manhana.	COLUMN TWO IS NOT	description and a local sector	
141181	- BARRAN AND AND AND AND AND AND AND AND AND A	ner the second contact	COMPANY AND A DESCRIPTION OF ADDRESS	the others.			
1000	The American Street and	the first control control.	ATTEL MADE	Inc. ( Sec.)	10011-00110-0011	-Barrisson and a	
1012201	CREAT INAMES CONTRACTOR	1417 March Consult Constraints	1.045 ( \$25.05.040446 ( \$1.05.04)	the other to .	ALC: NO. OF THE OWNER.	description of the	
(A MONTO	date for and the submer of			manhara.	101110-000001	descent of the	
15111651	disconteners considered	ner bie south contact	Design Providence	HALFHARD,			No Service
10085	MENDER - AVAILABLE -	the Carlo Constant Contract	100000000000000000000000000000000000000	INCOMPANY.	101102-00100-001	-Recommendation	
101120	Additional division of	- College Control Control of Cont	100000000000000000000000000000000000000	de contena.	100124-000	descent and a second	
44171.	CONTRACTOR AND A DESCRIPTION	- to a state of the second	AT TALL IS COLUMN TO	manhana.	COLUMN TWO IS NOT	other descendents	
distant.	describe one of a feetings	NOT THE CONTRACTOR	- and the state of the second state of the	HALFMANN,	100010-0000000		No Service
access.	CONTRACTOR OF A DESIGNATION	the first country contact.	100001000-0.00000000	The Course	1001100-00010-010	other the states	
1611080	CARGON ALL MARKEN	- des links in terms of the defined in	Inclusion Anna	discrimina.	1001100000000	(decreased)	
111681	SUPPLY ADDRESS OF A	the Device of the second second	COMPANY LOOK OF	ine other to	100010-0708-01	other discovery	
11110	ontering commercials	- and the constant contact.	1.0000.0000.0000.0000.000	MA CREEK.	1001-111-001-1		
10000-01	STATISTICS AND DECIMAL	- Arr Ball & Control ( California)	1000 10000 cm-0.000000	ine classical	1011100000000	descent of the	
1001-001	(STREET FLIGHT)	- der Tall in Sessent in selling i	CONTRACTOR CONTRACTOR	We owned a		decourses)	
distai-	Street Shirk American Street and	the State constitution	AUDIO COMPANY AND	The other last	1.0700100001	der retriefenten.	No Service
101110	100000000000000000000000000000000000000	- and the constant contract	THE CONTRACTOR OF A DESCRIPTION OF	BACKERS,			
10.000.000	CONTRACTOR .	- Arr Sale & Sound & California		Marchaela.		other a localization.	
10111-01	(Readors (Realized))	-E-TRI Constitution	CONTRACTORY AND INCOME.	We result.	1.0782/0011	departments.	
Admitti	ing Practitioner:	AT 1945 - 4100 - 480 - 480 - 19	Distinct Count of Curren	nt Open Clients	16		
	IN PROPERTY AND		CONTRACTOR OF STREET,	NUMBER OF TAXABLE	THE REPORT	and set on the	
19685	GARLING.	100 Bilde				-Reconstruction	
1611250	COLUMN TWO IN CASE OF	THE REPORT OF A DESCRIPTION OF A DESCRIP	100000000000000000000000000000000000000	CONTRACTOR OF	Read and the second of the	(Revealed)	

## 815 Clients open 60 days or less

Description	This report is organized by admitting practitioner. It				
	also lists the last date of service for each client and can				
	be used to view the clients opened to the selected				
	program under 60 days				
How to read	A. This report displays clients opened to your				
the	team for less than 60 days.				
report	B. If these clients are to remain open they will be				
	required to have a treatment plan				



### Monterey County Behavioral Health Clients Open for 60 days or less

	Admission date	Date of discharge	Length of stay to date	,	Last Date of Service
Team N	ame			10	
61617	5/21/2014		2	18175-11801-1-MAR 88-100	5/21/2014
616332	4/22/2014		31	10.000.0000.0000.00000	5/22/2014
728601	4/30/2014		23	101010-01010-0100-000	5/14/2014
228271	4/28/2014		25	100000000000000000000000000000000000000	5/1/2014
711801	4/17/2014		36	AAAAAAAAAAAAAAAAAAAAAAAAAAAAAAAAAAAAAA	5/8/2014
714893	5/6/2014		17	STREET, MARKING, MARKING, CO.	5/6/2014
813272	5/5/2014		18	CANTER AND AND A DESCRIPTION OF	5/15/2014
81563	4/29/2014		24	WATTERS CARGING CO	5/21/2014
818861	3/24/2014		60	CANTER AND ADDRESS OF TAXABLE AD	5/19/2014
918681	5/22/2014		1	NUTCINE CONTROLS	
Total Client	Count 10				

816 Indirect Service Codes Report

Description	This report can be used to audit how much time is being used by staff for indirect services. It is organized by management and supervisor teams.
How to read the report	A. Displays the date of service, site, service code and the duration.



Monterey County Behavioral Health 816 Indirect Service Codes Report

Monterey	County BH			
Adult Sy	stem of Care			
ASOC	Salinas Regional Team	13		
A	SOC, Salinas Valley Team 1	13		
	(000177) -\			
	1/3/2017			
	Site: Adult Services Clinic	Service Code: 802	Duration:	120
	1/6/2017			
	Site: Adult Services Clinic	Service Code: 803	Duration:	120
	1/10/2017			
	Site: Adult Services Clinic	Service Code: 802	Duration:	120
~	1/13/2017			
	Site: Adult Services Clinic	Service Code: 807	Duration:	60
	1/17/2017			
	Site: Adult Services Clinic	Service Code: 803	Duration:	540
	1/24/2017	Consider Condex (202	Durations	100
	Site: Adult Services Clinic	Service Code: 802	Duration:	120
	1/2//201/ Site: Adult Services Clinic	Sanvico Codo: 207	Duration	60
	Site: Adult Services Clinic	Service Code: 807	Duration:	120
		Service Code: 805	Duration:	120
	1/31/2017 Site: Adult Services Clinic	Service Code: 202	Duration:	120
	Site: Adult Services Clinic	Service Code: 802	Duration:	200
	a la laon a	Service 60 del 805	Daracion.	300
	Site: Adult Services Clinic	Service Code: 803	Duration:	120
	2/6/2017	000	Denotion	120
	Site: Adult Services Clinic	Service Code: 807	Duration:	60
	2/7/2017			
	Site: Adult Services Clinic	Service Code: 802	Duration:	120
	Site: Adult Services Clinic	Service Code: 803	Duration:	60
	2/10/2017			
	Site: Adult Services Clinic	Service Code: 807	Duration:	60
	2/14/2017			
	Site: Adult Services Clinic	Service Code: 803	Duration:	540
	2/15/2017			
	Site: Adult Services Clinic	Service Code: 803	Duration:	90

## 817 MORS scores by Team

Description	This report shows the MORS completed by your staff
How to read the	<ul> <li>A. This report displays client history of MORS entries</li> </ul>
report	B. There is also a field with "Days since the last MORS'
Important Tips	<ul> <li>Use this report to make sure each client has a mors within the recommended time period</li> <li>If you double click on the staff member name you will be able to isolate only that staff members list and print to hand to them. To go back to the main list click on the preview tab.</li> </ul>

A CO	UNTY	MORS	Scores By Team	1		
	CO PO	Toam ·	ASOC CSOC TE	A M		
		iedili.	ASUC, COUCTER	H. 1W		
Stoff Ma	850					
Stall Me	mber					80
111111	LastNa	ame,FirstNa	ame			
		12/02/2010 03/24/2011 04/29/2011 10/21/2013	6 Coping/Rehabilitating 6 Coping/Rehabilitating 6 Coping/Rehabilitating 5 Poorly Coping/Engaged			
				Days Since Last MORS	214.00	
111111	LastN	ame,FirstNa	ame			
111111	LastN	09/02/2010 12/28/2010 01/11/2011 02/08/2011 03/08/2011 05/17/2011 05/17/2011 09/20/2011 12/20/2011 04/24/2012 05/22/2012 09/19/2013 ame,FirstN:	5 Poorly Coping/Engaged 5 Poorly Coping/Engaged 5 Poorly Coping/Engaged 5 Poorly Coping/Engaged 6 Coping/Rehabilitating 6 Coping/Rehabilitating 6 Coping/Rehabilitating 6 Coping/Rehabilitating 4 Poorly Coping/Not Engaged 4 Poorly Coping/Not Engaged 5 Poorly Coping/Engaged 6 Coping/Rehabilitating	Days Since Last MORS	246.00	
		08/31/2011	5 Poorly Coping/Engaged			
		07/03/2012	6 Coping/Rehabilitating			
		04/25/2014	6 Coping/Rehabilitating			
444444	Institu	mo Eirsthie		Days Since Last MORS	28.00	
111111	Lastiva	04/15/2013	5 Poorly Coning/Engaged			
		12/16/2013	5 Poorly Coping/Engaged	Days Since Last MORS	158.00	
111111	LastNa	ame,FirstNa	ime			
		05/13/2011 05/10/2012 05/23/2013 06/01/2014	6 Coping/Rehabilitating 6 Coping/Rehabilitating 6 Coping/Rehabilitating 5 Poorly Coping/Engaged	Days Since Last MORS	-9.00	

## 818 Financial Eligibility by Program

Description	This report shows total count of open clients, medi-cal
	clients, drug medi-cal clients, and medicare.
How to read	A. For each client ID it show the list of guarantors,
the	admission date, and coverage start date
report	



#### Monterey County Behavioral Health Financial Eligibility By Program

Program I	Name		Current Open Clients Count of Medi-Cal Clients Count of Drug Medi-Cal Clients Count of Medicare Palmetto GBA	101 69 0 6		
Client ID	Name: Clier	nt Name	Admit Staff: Staff Name	10110	Admit Date	4/22/2014
Guarantor Order		Number Name:		Coverage	Start Date	
100000	Name:	t fillen	Admit Staff:	Sec. 1	Admit Date	:2/27/2014
Guarantor Order	1	Number 10 Name: MEDI	CAL	Coverage	Start Date	2/27/2014
10010101	Name:		Admit Staff:		Admit Date	7/23/2008
Guarantor Order	1	Number 2 Name: MEDIC	ARE PALMETTO GBA	Coverage	Start Date	7/1/2009
Guarantor Order	2	Number 10 Name: MEDI	CAL	Coverage	Start Date	7/1/2009
Guarantor Order	3	Number 3 Name: UMDAF	2	Coverage	Start Date	7/1/2009
Guarantor Order	4	Number 1 Name: MONTE	EREY BHD SD	Coverage	Start Date	7/1/2009
01001	Name:	NERG PERMIT	Admit Staff:		Admit Date	:1/31/2014
Guarantor Order	1	Number 10 Name: MEDI	CAL	Coverage	Start Date	1/31/2014
10100101	Name:	February 1010, 2000 (101)	Admit Staff:		Admit Date	5/14/2014
Guarantor Order		Number Name:		Coverage	Start Date	
1916581	Name:	94	Admit Staff:	Sec. St.	Admit Date	:4/24/2014
Guarantor Order		Number Name:		Coverage	Start Date	
1742780	Name:	1819 (States) (States)	Admit Staff:		Admit Date	4/22/2014
Guarantor Order		Number Name:		Coverage	Start Date	
1919941	Name:	101101000000000000000000000000000000000	Admit Staff:	Sec. St.	Admit Date	1/30/2014
Guarantor Order	1	Number 10 Name: MEDI	CAL	Coverage	Start Date	1/30/2014
Guarantor Order	2	Number 3 Name: UMDAF	5	Coverage	Start Date	1/30/2014
Guarantor Order	3	Number 1 Name: MONTE	EREY BHD SD	Coverage	Start Date	1/30/2014
1010000	Name:		Admit Staff:	664-187	Admit Date	:1/16/2014
Guarantor Order	1	Number 10 Name: MEDI	CAL	Coverage	Start Date	1/16/2014
Guarantor Order	2	Number 3 Name: UMDAF	2	Coverage	Start Date	1/16/2014
Guarantor Order	3	Number 1 Name: MONTE	EREY BHD SD	Coverage	Start Date	1/16/2014
7748760	Name:	Contrast and an	Admit Staff:		Admit Date	2/13/2014
Guarantor Order	1	Number 10 Name: MEDI	CAL	Coverage	Start Date	2/13/2014
Guarantor Order	2	Number 3 Name: UMDAF	2	Coverage	Start Date	2/13/2014
Guarantor Order	3	Number 1 Name: MONTE	EREY BHD SD	Coverage	Start Date	2/13/2014

## 820 Current Compliance Alerts by Team

Description	This report displays current compliance alerts on
	he used to view clients that need further action in
	order to be compliant.
How to read	A. The problem section describes the issue
the	B. Emails 1-3 displays the dates the staff member
report	was notified of the issue
	C. QI Action is the action the QA staff member has
	taken to correct /notify the staff member
	D. Clinician Action is the action the clinician must
	do
Important	- By double clicking on the staff member name
Tips	you can isolate that staff members list
	- To go back to the original screen click on the preview tab

	Current Compliance / Team: ASOC, CSOC T	Alerts By T eam	eam				
Staff Name					1		
PATID Last	,First						
Problem FINAL TREATMENTPL to 9/30/2014 (episode 7	AN REQUIRED, Plan Status is Draft 10/1/2013	Email-1 Email-2 E 11/25/13 1/24/14	mail-3	QIAction Emailed clinician and posted client alert	Clinician Action Finalize ourrent treatment plan	Resolved No	Date Resolved
Staff Name					3		
1100.01 (0.000)	101000						
Problem OVERDUE TREATMEN 10/31/2014 (episode 6)	T PLAN - Plan Dates Should Be 11/1/2013 to	Email-1 Email-2 E 11/12/13 12/9/13	mail-3	QI Action	Clinician Action Generale and finalize a current treatment plan	Resolved No	Date Resolved
Problem Overdue treatmen 8/31/201	T PLAN - Plan Date Should Be 9/1/2013 to	Email-1 Email-2 E	mail-3	QI Action Emailed clinician and posted client alert	Clinician Action Generate and finalize a current treatment plan	Resolved No	Date Resolved
Problem OVERDUE TREATMEN 9/30/2014	T PLAN - Plan Date Should Be 10/1/2013 to	Email-1 Email-2 E 10/29/13	mail-3	QI Action Emailed clinician and posted client alert	Clinician Action Generate and finalize a current treatment plan	Resolved No	Date Resolved
Staff Name	1				2		
	COMPANY.						
Problem FINAL TREATMENT PL to 9/30/2014 (episode 7	AN REQUIRED, Plan Status is Draft 10/1/2013 )	Email-1 Email-2 E 11/25/13 1/24/14	mail-3	QI Action Emailed clinician and posted client alert	Clinician Action Finalize current treatment plan	Resolved No	Date Resolved
Problem OVERDUE NEW TREA to 2/28/2015 (episode S	TN ENT PLAN - Plan Date Should Be 3/1/2014 1)	Email-1 Email-2 E 4/11/14 5/14/14	mail-3	QIAction Emailed clinician and posted client alert	Clinician Action Generate and finalize a current treatment plan	Resolved No	Date Resolved
Staff Name	19921				1		
1111101 (8111)	CO.NHE.						
Problem FINAL TREATMENTPL to 9/30/2014 (episode 7	AN REQUIRED, Plan Status is Draft 10/1/2013 )	Email-1 Email-2 E 11/25/13 1/24/14	mail-3	QI Action Emailed clinician and posted client alert	Clinician Action Finalize current treatment plan	Resolved No	Date Resolved
	Confidential Patien	t Information See Cal	ifomia Wel	Page 1 of 2 Ifare and Institution's Code Sec	tion 5328 Print Date: 5/28/2014		

## 821 Productivity by Team

Description	This report displays productivity for the selected
	month and team
How to read	A. The blue heading displays the management
the	team and supervisory team
report	B. The yellow heading displays the staff member ID and name.
	C. Under the yellow heading billed minutes for
	each month are displayed in green text, the productive minutes are in black text, and the
	back out minutes are displayed in red text.
	D. In the last row for each staff member (each
	month) your will see the percent of
	productivity for each month
	E. In the last column (on the right side of the
	report) you will see a Year to Date column for
	billed minutes, productive minutes, back out
	minutes, and year to date percent productive
	for each staff member
	F. At the end of the report it displays totals for the
	team including a count of clinicians and count of clinicians over 75 percent productive
Important	- Before processing the report choose from the
Tips	drop down if you would like to view billed minutes and productive minutes. If both of those choices are selected as NO you will only see the percent productive for each month and the year to date as well

	Staff Name	6L		<b>HADREST</b>	a interiora								
	JAN	FEB	MAR	APR	MAY	JUN	JUL	AUG	SEP	OCT	NOV	DEC	YTD
BILLED	2,689	2,719	1,003	0									6,41
PROD	2,820	2,994	1,118	0									6,93
ack Out	1,770	1,200	300	0									3,27
% Prod	36.7%	40.7%	12.2%	0.0%									28.
<del>18773</del> ) (	1000 Press	HAMA.											
	JAN	FEB	MAR	APR	MAY	J UN	JUL	AUG	SEP	OCT	NOV	DEC	YTD
BILLED	3,766	5,679	3,788	4,178									17,41
PROD	4,246	6,134	4,478	4,628									19,48
ack Out	1,140	0	1,080	660									2,88
% Prod	51.1%	71.7%	53.5%	50.0%									56.
HE7781	ABOARDA.	<b>B</b> A		100	MAY	2.00	210	4115	652	057	101/	255	100
BILLED PROD	JAN 4,678 5,008 1,440	FEB 4,351 4,906 1,080	MAR 5,473 6,178 1,260	APR 1,948 1,948 540	MAY	NUC	JUL	AUG	SEP	ост	NO V	DEC	YTD 16,45 18,04
BILLED PROD ack Out % Prod	JAN 4,678 5,008 1,440 62.5%	FEB 4,351 4,906 1,080 65.6%	MAR 5,473 6,178 1,260 <b>75.4%</b>	APR 1,948 1,948 540 <b>20.8%</b>	MAY	NUC	JUL	AUG	SEP	OCT	NOV	DEC	YTD 16,45 18,04 4,32 54,0
BILLED PROD ack Out % Prod	JAN 4,678 5,008 1,440 62.5%	FEB 4,351 4,906 1,080 65.6%	MAR 5,473 6,178 1,260 <b>75.4%</b>	APR 1,948 1,948 540 <b>20.8%</b>	MAY	J UN	JUL	AUG	SEP	OCT	NOV	DEC	YTD 16,45 18,04 4,32 54.0
BILLED PROD ack Out % Prod	JAN 4,678 5,008 1,440 62.5%	FEB 4,351 4,906 1,080 65.6%	MAR 5,473 6,178 1,260 <b>75.4%</b>	APR 1,948 1,948 540 <b>20.8%</b>	MAY	JUN	3 UL	AUG	SEP	OCT OCT	NO V	DEC	YTD 16,45 18,04 4,32 54,1
BILLED PROD ack Out % Prod	JAN           JAN           4,678           5,008           1,440           62.5%           JAN           JAN           4,263	FEB 4,351 4,906 1,080 65.6% FEB 3,422	MAR 5,473 6,178 1,260 <b>75.4%</b> MAR 4,540	APR 1,948 1,948 540 <b>20.8%</b>	MAY	JUN	JUL	AUG	SEP	OCT OCT	NO V NO V	DEC	YTD 16,45 18,04 4,32 54.1 YTD
BILLED PROD ack Out % Prod BILLED PROD	JAN           4,678           5,008           1,440           62.5%           JAN           4,263           4,446	FE8 4,351 4,906 1,080 65.6% FE8 3,422 3,797	MAR 5,473 6,178 1,260 <b>75.4%</b> MAR 4,540 4,540 4,720	APR 1,948 1,948 540 <b>20.8%</b> APR 2,843 3,038	MAY	J UN J UN	J UL	AUG	SEP	OCT OCT	NO V NO V	DEC	YTD 16,45 18,04 4,32 54. YTD 15,00 16,00
BILLED PROD ack Out % Prod BILLED PROD ack Out	JAN           4,678           5,008           1,440           62.5%           JAN           4,263           4,466           1,920	FEB 4,351 4,906 1,080 65.6% FEB 3,422 3,797 960	MAR 5,473 6,178 1,260 <b>75.4%</b> MAR 4,540 4,540 4,540 0	APR 1,948 1,948 540 <b>20.8%</b> APR 2,843 3,038 1,440	MAY	3 UN 3 UN	JUL	AUG	SEP	OCT OCT	NO V NO V	DEC	YTD 16,45 18,04 4,32 54.1 YTD 15,00 16,00 4,32

Sum mary Counts and Percents donot include - Supervisor, Manager, Mental Heath Aid, Behavioral Heath Aide, or Intern Results Print Date 5/28/2014 Page Number: 2

Totals fo	r Supervisor T	eam:											
	JAN	FEB	MAR	APR	MAY	JUN	JUL	AUG	SEP	OCT	NOV	DEC	YTD
BILLE	D 37,343	34,635	27,243	25,448									124,669
PRO	D 40,370	38,324	31,278	28,733									138,705
Back Ou	t 7,575	4,740	12,400	7,020									31,735
% Pro	d 68.9%	69.5%	58.1%	54.8%									63.1%
# Clinician	s 7	7	7	6									6.75
# over 759	6 2	2	3	1									2.00
% over 759	28.5%	28.5%	42.8%	16.6%									29.63%

Report Number: 821

#### 822 Active Service Codes by Program

Description	This report displays all service codes available to the
	specific program selected. Use this report for questions
	about which service codes can be billed in a program.
How to read	A. Double check you selected the correct program
the	B. View service codes available to bill under this
report	program
Important	- If you notice a service code missing. Please
Tips	contact QI at our helpline 831-755-4545



County of Monterey - Behavioral Health Program Information Report As Of 5/28/2014

#### Program Code Program Name Program C Address: 951 Blanco Circle Salinas, CA 93901-4451

- Page 1 of 2

## 823 Service Detail by program

Description	This report displays billing details for each client in the program selected.
How to read the report	<ul> <li>A. This report is organized by patient ID. Below each patient ID you will see a list of services provided for that date range selected.</li> <li>B. Next to the patient ID you will see a total count of services for that patient ID and total duration in minutes</li> </ul>



#### Monterey County Behavioral Health Service Detail by Program and Client

Program Name	COURSE IN LAND	insi	10000	#of clients	20	total min	utes	3,015
PATID		ount	of services	3		Duration total	115	
service code 301	Duration	30	date_of_service	1/13/2014	ŧ.	Provider	101108401	101110
service code 330	Duration	3	date_of_service	1/6/2014		Provider	101106001	101110
service code 391	Duration	82	date_of_service	1/13/2014	1	Provider	10110-001	101110
111108	CC	ount	of services	2		Duration total	118	
service code 330	Duration	3	date_of_service	1/6/2014		Provider	10110301	101110
service code 391	Duration 1	15	date_of_service	1/13/2014	1	Provider	10110001	101110
1988391	CC	ount	of services	1		Duration total	5	
service code 330	Duration	5	date_of_service	1/7/2014		Provider	10110000	101110
110100	cc	ount	of services	3		Duration total	259	
service code 301	Duration	28	date_of_service	1/29/2014	ŧ.	Provider	10 Contractor	111
service code 331	Duration 1	11	date_of_service	1/16/2014	1	Provider	10110001	
service code 331	Duration 1	20	date_of_service	1/16/2014	1	Provider	10110001	100.00
100000	co	ou nt	of services	3		Duration total	97	
service code 330	Duration	2	date_of_service	1/2/2014		Provider	101100000	
service code 330	Duration	4	date_of_service	1/13/2014	ŧ.	Provider	101106001	
service code 381	Duration	91	date_of_service	1/22/2014	ŧ	Provider	101106001	
100111	cc	ount	of services	3		Duration total	180	
service code 341	Duration	60	date_of_service	1/2/2014		Provider	1011000	1000
service code 341	Duration	92	date_of_service	1/3/2014		Provider	101106001	
service code 381	Duration	28	date_of_service	1/2/2014		Provider	101106001	10111
1010100	cc	ou nt	of services	4		Duration total	305	
service code 301	Duration	99	date_of_service	1/13/2014	ŧ.	Provider	101100000	10101
service code 361	Duration	45	date_of_service	1/13/2014	ŧ.	Provider	FR64111	10.01
service code 381	Duration	90	date_of_service	1/13/2014	1	Provider	10110001	1000
service code 381	Duration	71	date_of_service	1/27/2014	ŧ.	Provider	101106001	10010
101000	cc	ount	of services	1		Duration total	4	
service code 330	Duration	4	date_of_service	1/14/2014	ł	Provider	101108401	1000
184553	CC	ou nt	of services	1		Duration total	94	
service code 391	Duration	94	date_of_service	1/21/2014	ŧ.	Provider	COLUMN T	
101111	cc	bunt	of services	1		Duration total	23	
service code 301	Duration	23	date_of_service	1/14/2014	1	Provider	1011000	100.000
101000	CC	ou nt	of services	2		Duration total	150	
service code 301	Duration	36	date_of_service	1/27/2014	ł	Provider	THE PARTY.	
service code 391	Duration 1	14	date_of_service	1/23/2014	1	Provider	10110000	1000
101000	CC	ou nt	of services	3		Duration total	154	
service code 301	Duration	29	date_of_service	1/27/2014	ŧ	Provider	THE PARTY	
service code 301	Duration	9	date_of_service	1/29/2014	ł	Provider	COLUMN T	1000
service code 391	Duration 1	16	date_of_service	1/23/2014	1	Provider	A DALL BRANCH	10000

## 824 Waitlist and Referral List – Non Assigned

Description	This report displays a list of clients referred that have
	not been assigned organized by priority.
How to read	A. You can view any notes entered in the waitlist
the	and referral form by clicking on the on demand
report	sub-report link.



Monterey County Behavioral Health 824 Waitlist and Referral List- Not Assigned Program/s: CS FAST Dependency Unit

Referral Date	Priority	PATID	Patient Name	Staff Referring	Review Date	Accepted	
3/16/2018	Yes	1	INCOME THE ALL MADE	MARGINE, ARRIVED	3/16/2018		Click here to view notes
3/9/2018	No	800.78	Service and the local field	short set as	3/9/2018		Click here to view notes
Referral Ac	cepted						
1/29/2018	Yes	817754	CONTRACTOR (CONTRACTOR)	BUILDECKE.	1/29/2018	Yes	Click here to view notes
3/12/2018	No		LINE, CORP.	STATUS, CAMPUS	3/12/2018	Yes	Click here to view notes
3/7/2018			NUMPER AND ADDRESS	LANSING MICH.	3/7/2018	Yes	Click here to view notes

Description	This report displays all the clients referred that have been assigned.
How to read	A This report displays the following:
ile.	n. This report displays the following.
the	a. Referral date
report	b. Priority
	c. Client id
	d. Client name
	e. Family #
	f. Age
	g. Preferred language
	h. Staff referring
	i. Program name
	j. Review date
	k. Referral accepted?
	l. Clinician assigned
	m. Other referring party information
	n. Notes

Monterey County Behavioral Health 825 Waitlist and Referral History report- Assigned	
Referral Date Priority PATID Patient Name Familys Age Language Staff Referring Program_Name Review Date A 3/24/2015 Yes 803a 39 English MCDOUGALL.KELLI CSFAST Dependency 3/24/2015	teferral Clinician Accepted Assigned Yes ELIS,RACHEL
C Unit	
Notes: Vietnes	
the second se	and as a state of the
Date Assigned/Denied: 4/16/2015	
Disposition Notes: Client as signed by N. Smith.	
9/20/2017 Yes 45 English LAFRENERE,KRISTN CSFAST Dependency 9/20/2017	Yes DAVIS, VANES
Other referring party:	SAC
Notes:	#101-111-114
Date Assigned/Denied: 10/9/2017	
Date Assigned/Denied: 10:9/2017 Disposition Notes: Client as signed by N. Smith.	
Date Assigned/Denied: 10:9/2017 Disposition Notes: Client as signed by N. Smith. 7/22/2016 Yes 50 English GIFFORD.LEAH A CS FAST Dependency 7/22/2016	Yes BRISTOW ALE
Date Assigned/Denied: 1097/017 Disposition Notes: Client assigned by N. Smith. 7/22/2016 Yes 50 English GIFFORD.LEAH A CSFAST Dependency 7/22/2016 Unit Unit	Yes BRISTOW, ALE XANDRA

a carry company and more thank again, provide that character parts as liken the betterny to

#### Date Assigned/Denied: 7/22/2016

Disposition Notes: Client assigned by N. Smith.

## 828 Waitlist and Referral Detailed – Not Assigned

Description	This report displays all details of the clients referred
	that have not been assigned.
How to read	A. This report displays the following:
the	a. Referral date
report	b. Priority
	c. Client id
	d. Client name
	e. Family #
	f. Age
	g. Preferred language
	h. Staff referring
	i. Program name
	j. Review date
	k. Referral accepted?
	l. Clinician assigned
	m. Other referring party information
	n. Notes

Referral Date Prio 1/29/2018 Yes	rity PAT	D Patient Na	ame Family#	Age 12	Language English	Staff Referring BECK, MICHAEL	Program_Name CSFASTDependency Unit	R ev ie w D ate 1/29/2018	Referral Accepted Yes	Clin Assi
Notes: ENGLISH	irty: i									
	-		Grand Lorder		ate for the	an in purrage of	The alterna college of the a	1 d' - apart		
The second	225		Carrigon area			former franklige at 1.00 a	en i en al antidad a gerà	-	-	
3/16/2018 Yes Other referring p	arty:	A CONTRACTOR	1190		English	VASQUEZ,VERONICA	CS FAST Dependency Unit	3/16/2018		
3/16/2018 Ye⊨ Other referring pa Notes:	arty:		1190	15	English	VAS QÚEZ, VER ONICA	CS FAST Dependency Unit	3/16/2018		
3/18/2018 Yes Other referring po Notes: 3/9/2018 No	i rty:		1190	15	Englis h Englis h	VASQÚEZ, VERONICA WRIGHT, NATHAN	CS FAST Dependency Unit CS FAST Dependency Unit	3/16/2018 3/9/2018		
3/16/2018 Yes Other referring po Notes: 3/9/2018 No Other referring po	arty: i		1190	15 35	English English	VASQUEZ, VERONICA	CS FAST Dependency Unit CS FAST Dependency Unit	3/18/2018 3/9/2018		
3/18/2018 Yes Other referring po Notes: No 3/9/2018 No Other referring po Notes:	inty:		1180	15 35	English English	VASQÚEZ, VERONICA	CS FAST Dependency Unit CS FAST Dependency Unit	3/18/2018 3/9/2018		

## 829 Client contact sheet

Description	This rep	port displays all client address and contact
	informa	ation.
How to read	A.	This report contains all of the contact
the		information for the client. It is grouped on
report		team.



Monterey County Behavioral Health Client Contact Sheet for ASOC, Salinas Valley Team 1

Case Coordinator - RICO RAMIREZ,MOISES Admitting Practitioner - RICO RAMIREZ,MOISES Home Ph: Address: 1 Salinas 93	Relationship Type: Mother Last Name or Agency Name: First Name: Home Phone: . Cell Phone: Address: Release of Information:Yes (Full) Release Start Date: 9/14/2016
EDBLU ACTIVICATION OF I	
Case Coordinator - JOHNSON,MARION J Admitting Practitioner - JOHNSON,MARION J Home Ph: Work Ph: Address: Salinas 9	Relationship Type: Case Manager Last Name or Agency Name: First Name: Address: OA Relationship Type: Last Name or Agency Name: First Name: SA Home Phone: i Address: 606 S Emergency Contact: Yes Release of Information:Yes (Full) Release Start Date: 7/5/2016 Release End Date: 7/5/2017 Relationship Type: PCP Last Name or Agency Name: DR HOFFMAN Address: CA
ALC: NO ALC: VOL ALC: NO	
Case Coordinator - EDEZA,HILDA Admitting Practitioner - EDEZA,HILDA Home Ph: Address: I Salinas 9	Relationship Type: Mother Last Name or Agency Name: First Name: Home Phone Cell Phone Address: Salinas CA Beleass of Information:No

Description	This report displays clients MEDS eligibility by
	program
How to read	A. This report is organized by program
the	B. It displays the client's address in avatar, social
report	security number, medical number, aid code, and
-	last date of service.

PATID	ssn am Nami	Name	DOB	Address	City	State	Zip Code	<u>Episode</u> <u>Last Service</u>
ATID	Social # s Elig Data >>>	Patient Name Meds SS# CIN:123456789/	Date of Birth A Aid Code: 6E Stat	Street Address us Code: 999	Salinas	California	93901 Other Cov:	8 6/4/2014 File Date: 6/1/2014
Med	s Elig Data >>>	CIN:	Aid Code: 67 State	us Code: 501	Salinas 691	California	93906 Other Cov: D	10 6/12/2014 File Date: 12/1/201
ei iii iii ii	Cop./Masia Tau	A						
Med	s Elig Data >>>	CIN:	Aid Code: State	us Code: 999	10.00	California	93930 Other Cov:	2 6/12/2014 File Date: 6/1/2014
Med	s Elig Data >>>	CIN:	Aid Code: 67 Stat	us Code: 501	Greenfield 691	California	93927 Other Cov: N	4 6/9/2014 File Date: 6/1/2014
Med	s Elig Data >>>	CIN:	Aid Code: 60 State	us Code: 999	King City	California	93930 Other Cov:	16 5/15/2014 File Date: 10/1/20
Med	s Elig Data >>>	CIN	Aid Code: 82 State	us Code: 301	King City	California	93930 Other Cov: N	52 5/22/2014 File Date: 6/1/2014
Med	s Elig Data >>>	CIN:	Aid Code: State	us Code: 999	King City	California	93930 Other Cov:	7 5/27/2014 File Date: 1/1/2014
Med	s Elig Data >>>	CIN	Aid Code: 03 Stat	us Code: 999 03	Gonzales 999	California	93926 Other Cov: D	5 6/5/2014 File Date: 6/1/201
Med	s Elig Data >>>	CIN:	Aid Code: 60 State	us Code: 999	Marina	California	93933 Other Cov:	1 5/1/2014 File Date: 10/1/20
68937	100110-1101	CONTRACT LABORATION	107107-000	000 00000000000000000000000000000000000	Marina	California	93933	3 6/4/2014
Med	s Elig Data >>>	CIN:	Aid Code: Stat	us Code: 999	Salinas	California	93906 Other Cov:	2 6/6/2014 File Date: 2/1/201
and the second s	100-1-100	The second s	10.7307.000	AND INCOME.	Marina	California	02022	2 E/22/201/

### 831 Program Service Information

Description	This report displays staff member service information organized by service code. Use this report to view total minutes billed to each service code during the time frame selected.		
How to read the report	<ul> <li>A. This report is organized by program staff member and service code.</li> <li>B. This report only displays billed minutes through the clinical progress note or group progress notes. (Does not include 800 code information entered into the scheduling calendar)</li> </ul>		
Important Tips	<ul> <li>Double click on the service coder number (e.g. 301) to view details on the services contributing to the total minutes billed and average minutes billed for service code</li> </ul>		



Monterey County Behavioral Health 831 Program/Staff Services Information

#### Program Name

Staff:				
Staff ID#	Report Date Range			
Service Code: 391	Plan Development	Total Minutes Billed 154	Average Per Session 51	
Staff:	AREAD			
Staff ID#	Report Date Range			
Service Code: 301	Lin kage/Brokerage	Total Minutes Billed 549	Average Per Session 23	
Service Code: 311	Collateral	35	35	
Service Code: 330	Non Billable Activity	188	17	
Service Code: 331	Assessment and Evaluation	455	76	
Service Code: 351	MH Group Rehab Counseling	2,716	25	
Service Code: 381	Mental Health Rehab	359	40	
Service Code: 391	Plan Development	663	66	
Service Code: 485	Mental Health in Locked Facility	85	85	
Staff:				

Staff ID# Report Date Range

Service Code: 301	Linkage/Brokerage	Total Minutes Billed 10	Average Per Session 10
Staff:	NAME:		
Staff ID#	Report Date Range		
		Total Minutes Billed	Average Per Session
Service Code: 301	Linkage/Brokerage	9,911	65
Service Code: 330	Non Billable Activity	1,630	68
Service Code: 331	Assessment and Evaluation	50	50
Service Code: 351	MH Group Rehab Counseling	3,724	29
Service Code: 405	Case Management in Locked Facility	/ 112	56
Staff:	41141		
Staff ID#	Report Date Range		
		Total Minutes Billed	Average Per Session
Service Code: 301	Linkage/Brokerage	95	19
Service Code: 361	Medication Support	510	30

### Drill down view when double clicking on the service code

Service Code: 301	Linkage/Brokera	je	549		23	
Client ID #	8holdeservice	01/02/2014	minutes	13	Age:	56
Client ID #	2holdeservice	01/07/2014	minutes	14	Age:	54
Client ID #	2holdeservice	01/16/2014	minutes	68	Age:	29
Client ID #	2hoideservice	01/16/2014	minutes	35	Age:	25

### 833 User Access Details

Description	This report displays the forms and reports each staff member has access to.
How to read the report	<ul><li>A. Grouped by System Code</li><li>B. Displays Staff Name, User ID &amp; Staff Title.</li><li>C. Displays the number of staff assigned to that System code.</li></ul>
Important Tips	<ul> <li>You can drill down to see detail by double clicking on the staff name. This will display all of the forms and reports the staff member has access to.</li> </ul>



### Monterey County Behavioral Health 833 User Access Details

System Code and Staff associated with system code Double dick on a specific user ID to view which forms the user has access to

ASPIRANET		Staff Count 8	
Staff Name	User ID	Title	
State of the state of the	100.000.000	LCSW	
	10000	AMFT (Associate MFT)	
		AMFT (Associate MFT)	
		PHA (Pohavioral Hoalth Aido)	
		MHS (Mental Health Specialist)	
		wind (wentannearth opeolaid)	

снѕ		Staff Count 24
Staff Name	User ID	Title
territor and all the last	and the second sec	LCSW
and the second se	Marca Marca	MFT Trainee
and a second second second		MSW Intern
	10000	Admin- Billing
		LCSW
		Admin-Billing
		ASW (Associate Social Worker)
Statistic approximate	and the second sec	APCC (Associate PCC)
the second decision of the		Admin-Billing
and a second second	10000.0110	AMFT (Associate MFT)
contraction and statements		Admin-Billing
and the second sec		CATC (Registered)
and the second se		AMFT (Associate MFT)
		Admin - Billing
and the second second		MSW Intern
and the second second	and the second of	RAS
ALC: NO DE LA CONTRACTION DE LA CONTRACTICACIÓN DE LA		Psychologist (Licensed)
		AMFT (Associate MFT)
the second s	and the second sec	Admin-Billing
and the second		RAS (Registered)
ALCONOMIC DE LA CONTRACTÓ	ALC: NOT THE R.	MSW Intern
and the second second		AMFT (Associate MFT)
the local distance	the second s	MHRS or equivalent
and the second second		Admin-Billing
CROSSROADS		Staff Count 1
Staff Name	User ID	Title
	TENORIOBM	
Page: 1		
Date: 3/21/2018		833 User Access Details

834Productivity	(hv	hilling	code+	Program
054FIOUUCUVILY	UV	DIIIIIg	coue+	riogram)

0011104400111				
Description	This report can help you view the amount of minutes a staff member is billing each service code This report shows the billable time organized by program then billing code			
How to road	D This report is corted by programs the			
now to read	D. This report is sorted by programs the			
the	selected staff member has billed for the			
report	selected time frame			
·	<ul> <li>E. This report displays the service codes the staff member billed to. It also displays the total minutes billed under that service code and the average minutes per session.</li> <li>F. Displays total minutes billed for the selected time frame and a total of hours and</li> </ul>			
	minutes at the bottom of the report			
	G. This report only displays billed minutes			
	through the clinical progress note or group progress notes. (Does not include 800 code information entered into the scheduling calendar)			
Important Tips	<ul> <li>This will help you to evaluate the amount of billable time your staff has on a monthly basis</li> <li>Double click on the service code (number) to</li> </ul>			
	view the billing details that contributed to the minutes in that service code. To go back to the main report click on the preview tab			



Monterey County Behavioral Health 834 Staff Productivity Broken Down by Billing Code and Program

Staff:	417104	Report Date Range: 2/1/2014 to 3/1/2014			
Stall ID#					
CS MHSA TIP AVANZ/	A FSP	I	otal Minutes Billed	Average Per Session	
Service Code:	330	Non Billable Activity	110	110	
Service Code:	351	MH Group Rehab Counseling	1,038	69	
Service Code:	381	Mental Health Rehab	143	143	
CS MHSA TIP Avanza	SYSDEV				
Service Code:	301	Linkage/Brokerage	90	45	
Service Code:	330	Non Billable Activity	20	20	
Service Code:	381	Mental Health Rehab	1,452	161	

Total Billed Minutes = 2,853 Hours and Minutes = 48:33

## 835 Program services by Month

Description	This report displays count of services, service minutes,		
	and count of clients for the time frame selected.		
How to read	A. This report is organized by program. Multiple		
the	programs can be selected prior to running the		
report	report.		
	B. On the left side of the report you will see the		
	above counts by month		
	C. Below that you will see that information in a		
	color coded cross tab		



Monterey County Behavioral Health 835 Program Services by month Start Date 2/1/2014 End Date 5/1/2014

#### Progam Name 1

February	Countof Clients 66	Service Minutes 9,198	Service Counts 153
March	51	7,797	150
April	58	9,162	156
May	9	508	10
Totals	101	26,665	469
Progam Name	2		

February	Count of Clients 10	Service Minutes 1,014	Service Counts 35
March	16	1,676	50
April	20	2,196	65
May	3	124	3
Totals	24	5,010	153

#### Service Information Cross Tab

	February	March	April	May	Grand Total
Access	66	51	58	9	101
CALWORKS	153	150	156	10	469
	9,198	7,797	9,162	508	26,665
Access	10	16	20	3	24
CALWORKS King City	35	50	65	3	153
	1,014	1,676	2,196	124	5,010
		Clients S	erved		Count of Service

836 Specialty 7	Feam Form Report

Description	This report is organized by specialty team type. Use this report to view clients assigned to a specialty team. This includes specialty services like Katie A and AB109
How to read the report	A. Look for the specific specialty team to view which clients are assigned to that specialty team
oport	Specialty Team Types:
	Dual Diagnosis
	Medically Intense
	ASOC Intensive Team
	DBT
	Katie A
	Probation- Child
	AB109
	Adult High Risk Probation
	School Based- NO MEDICAL NECESSITY



Monterey County Health Department Behavioral Health Bureau 836 Specialty Team Form Report

PATID	Start Date	End Date	Specialty Team Service	Entered by
02/012				Real Canada
Specialty Team				
PATID	01/01/2014	Spe	ecialty Team	Staff Name
Vigitalitation	101010-001		100100	Charten Willer
7825525	and a strength of the states.		1001000	Controller on Millington
7923435	stephics Fam.		1001010	Contractory (Walth Diago)
1928433	1000 6310 640		101110	(Terrational Addates)
(18884F)	1186 2342240		105110	Topperson ( Massarilage
1986-161	1011 2012 2011		100100	describe Basel
(53.8806)	officiality Family		1001000	Strendly Physical Strength
19334940	1140 - 120 - 101		100100	Contraction ( Materiality)
152.419.00	152746741		101100	Controller on Williams
1011111	101110001100		101101	Contribution (Children)
(693113)	101214021-01		101100	anning man
101003-1-011	stage field in date		10100	Monanda / W/ Witt Dance
06180380	1146744884		101110	Contract William
10.000	154 1-14 1-14		10110	Stree Mark / What man report
10.415173	184 234 240		100100	Conversion on Spectropers
10.017140	manifest Fam		1001010	THE OTHER DO. MICHAELEN
00451/R	integrated inter-		100100	THE PROPERTY AND ADDRESS.
166-2-2017 MI	office \$ 400 \$ 400		1001000	Standard Hitting
184 A 197 A 1	1000010301100		101101	Strength and Contraction
10120120	1000 1000 111		101100	derrifte Beas
1010000	inka Kikas Kato		10110	Terrorites and Wellington
186513.0.00	ALCONTRACTOR .		1001030	Convine on William
101710-001	inter field in an		101110	Conversion on Address
101001/71	14489784		100100	Contract Willers
10400101	1990 7 4 2 7 40		100000	MARGINE PROVIDENTS
10.107780	Happing part		AND 10	Contractory (Manufactory)
1012-040121			1001000	Controller on Williams

## 838 End of employment Report

Description	This report prints the information entered into the end
	of employment form for the selected staff member.
How to read	A. Once you have filled out the End of
the	Employment form in Avatar you can print this
report	to hand to the staff member



Monterey County Behavioral Health End of Employment Report

Staff Name:

Staff ID:

Last Date of Employment:

Date of Exit Interview:

Resignation Letter Submitted to Supervisor:

Date Letter Submitted to Supervisor: Supervisor Name:

I Agree that the following have been completed before the date of resignation:

Additional Comments or Notes:

It is policy of the Department to protect the confidentiality of clients and their records. All Services offered by the Health Department are confidential in nature. I recognize that at the end of my employment I may no longer discuss clients or services provided.

Staff Signature

#### 839 Team History of Corrective Action Requests

Description	This report displays all Corrective Action Requested entered.
How to read the report	А.

#### 839 Team History of Corrective Action Requests

This report displays all CAR's entered

#### Problem Code

QI Notes: QI staff reviewed ASOC staff's updated Psychosocial Assessment which now appears to support medical necessity emphasizin; symtpoms and impairments as well as including aspects of client mental health history. Findings:

Staff Name:	CARGE ST	2,588.A	Superviso	r/Manager:	Raticka
Date of Request	PATID	OI Staff Name	Date of Service	Problem Code	Staff ID:
4/13/2015	multiple	Lucero Robles		Progress Note	

#### CAR Details

CAR Unique ID:	Service Code:	Episode Number:	Date of Follow up: 4/13/201
Risk:			

Narrative: As part of our ongoing quality improvement efforts we conduct random chart reviews. During the most recent review we noticed the following progress notes included issues around accepted documentation standards. Group progress notes include "see scanned progress note" as an entry for the response section of the FIRP progress note. This is not an acceptable standard of documentation of services. As noted in the Monterey County Behavioral Health Clinical Documentation Guide, all progress notes must stand alone in establishing medical Qecessity and must be completed using the FIRP format.

#### Example:

Recommendations: Moving forward please ensure your documentation meet the Monterey County Behavioral Health clinical documentation standards as noted in the Clinical Documentation Guide and Policies.

#### Follow up

QI Staff Name: Lucero Robles	Response Date:	Resolution Date: 8/17/2015
Extension Request:		

QI Notes: No group notes have been written since the issuance of the QIAR. There did not appear to be an issue with cut and paste "see scanned progress note" for individual progress notes. LR

Findings:

### 841 Waitlist Analysis History Report

Description	This report displays a history of the clients entered
	into the waitlist and referral form in avatar in all
	programs
How to read the report	<ul> <li>B. At the top of the report it displays number of clients placed on waitlist, average length of stay on waitlist, and number of clients that remain on the waitlist. You will also see the number of clients placed on the waitlist and still on the waitlist in ages 0-25.</li> <li>C. In Blue you will see a cross tab which breaks down the clients by program.</li> <li>D. In the second page you will see the details of the clients contributing to the numbers on the first page.</li> </ul>



Monterey County Behavioral Health Waitlist Analysis History Report Date range is 1/1/2014 to 3/1/2014

From 1/1/2014 to 3/1/2014 247 clients were placed on the waitlist. From 1/1/2014 to 3/1/2014 130 clients were between the ages of 0 and 25. The average length of stay on the waitlist was 24.43 days. The current count of clients that remain on the waitlist for 1/1/2014 to 3/1/2014 are: 82

The current count of clients that remain on the waitlist and are between the ages of 0 and 25 are: 35

NOTE: All totals are for the selected date range.

	Clients placed on waitlist	Clients Clients Unassigned Unass placed on between Clients clie waittlist 0-25 0-2		Unassigned clients 0-25
	10	6	7	4
CORRECTOR STREET, CORRECTOR	78	28	0	0
CONTRACTOR CONTRACTOR CONTRACTOR	24	14	8	6
CORDER NO. 17 CONTROL OF CONTRACT	13	7	9	6
CONTRACTOR OF A CONTRACTOR	1	0	1	0
COLUMN TO A COLUMNT TO A COLUMN TO A COLUMN TO A COLUMN TO A COLUMN TO A COLUMNT TO A COLUMN TO A COLUMNTA A COLUMN TO A COLUMNT TO A COLUMNTA A COLUMNT	6	0	6	0
Constant (Second	30	0	30	0
Contraction / Presservation	3	3	0	0
CONTRACTOR / RECENTLY AND A TANK	7	1	2	0
CONTRACT CONTRACT AND	20	16	0	0
COLOR OF THE ART OF THE ART OF THE ART.	14	14	0	0
COLOR CONTRACTOR	9	9	9	9
COMPANY OF THE OWNER OF TREASURE	5	5	5	5
COMPANY OF CAMERA IN	6	6	4	4
CONTRACTOR DATE OF COMPACT	21	21	1	1
Total	247	130	82	35

### Page 2 (Details)

PATID	R efe rral D ate	Date Assigned	Length of wait days	Age	Date client waitlisted	
101-000	02/04/14		132	2.7		
101011-	02/04/14		132	19.4		
101000	02/05/14		131	54.9		
1223-841	02/05/14		131	14.3		
181261	02/10/14		126	25.3		
11980	02/11/14		125	74.2		
101000-	02/11/14		125	46.0		
10181E	02/12/14		124	13.6		
11980-	02/13/14		123	74.2		
00880	02/13/14		123	12.3		
d ridinitie	02/16/14		120	17.9		

### 842 Waitlist Analysis Report Current

Description	This report displays clients waiting assignment
How to read	A. At the top of the report you will see number
the	of clients pending to be assigned.
report	B. You will also see the number of clients
	between the ages of 0-25.
	C. In Blue you will see a cross tab which
	breaks down the clients by program.
	D. In the second page you will see the details
	of the clients contributing to the numbers
	on the first page.



Monterey County Behavioral Health Waitlist Analysis Report - Current Clients waiting assignment

There are a total of 405 client Of those clients a total of 212	Clients placed on waitlist	Clients between 0-25	
		62	28
	In case in the later many in case of the case of the later	1	
	IN CARRY TORN OF THE REFIT OF FURITIES	1	0
	In case of the second second strength	29	12
	IN COMPANY OF TRANSPORTED BY THE COMPANY	38	26
	IN COMPANY OF TRANSPORTED BY TRANSPORT	1	1
	IN COMPANIES OF CONSTRAINTS AND ADDRESS.	40	21
	IN COMPACING THE REAL PROPERTY AND A DESCRIPTION OF A DESCRIPTION.	1	1
	CONTRACTOR OF A	1	0
	(ALCONGRAM) IN CONTRACTOR	1	0
	COLUMN TO A COMPANY OF	14	0
	Honorada ( Honor	53	0
	CONTRACTOR / PLATERINA	1	1
	CONTRACTOR / PERSON WHEN	6	6
	CONTRACTOR / RECORD AND A TABLE	33	6
	CONTRACT CONTRACTOR AND	22	14
	COLUMN TRANSPORT	8	8
	CONTRACTOR AND	28	28
	COLUMN ADDRESS OF THE OWNER OF TAXABLE PARTY.	9	9
	COMPANY OF COMPANY OF COMPANY	16	16
	CONTRACTOR / TORONA DI CONT	1	1
	CONTRACTOR AND INCOMENTS	1	1
	CONTRACTOR CONTRACTOR CONTRACTOR	29	29
	THE PERSON NUMBER OF TAXABLE	1	1
	STREET, THINKS, TAXABLE PARTY	2	0
	STREET, STORE STREET, STRE	1	0
	STREET, TANKING (TANKS)	1	0
	The continues (Trapper)	3	2
	The contraction of the second of the second	1	1
	Total	405	212

### Page 2 (Details)

PATID	R efe rral D ate	Date Assigned	Length of wait days	Age	Date client waitlisted	
-805801	09/30/11		990	13.3		
10010	10/03/11		987	20.9		
TABBLE	10/11/11		979	20.7		
1010101	10/27/11		963	21.9		
101000	10/28/11		962	18.3		
1817111	11/07/11		952	15.0		
100122-001	11/16/11		943	9.4		

## 843 Open Clients by Zip Code

Description	This report displays open clients in each program organized by zip code with primary diagnosis.
How to read the report	<ul> <li>A. The gray heading displays the program selected. If multiple programs were selected you will see two gray headings in different pages.</li> <li>B. The blue heading is the zip code those clients are assigned to (this zip codes comes from the address entered into the blue heading and the selected se</li></ul>
	admission form)
Important Tips	<ul> <li>If you double click on the zip code you can isolate clients in that zip code. To go back to the main page click on the preview tab.</li> </ul>



# Monterey County Behavioral Heath 843 Open clients by Zipcode This report shows all open client episodes that a staff member is the admitting practitioner for sorted by client name

PATID	Client Name	Case Coordinator	Psychiatrist		Admission Date	Next Appointment	
1000	100 TRANSMORT (11/1) (278)						
9342	26			1			
1010010	107700 L		No Entry		05/05/2014	06/23/2014	
Primary [	Diagnosis: ANXIETY DISORDER NO	os					
9392	26			1			
40000	CONC PRODUCTION	stratility (	101100-0000		01/16/2013	06/26/2014	
Primary [	Diagnosis: BIPOLAR I DISORDER IN	IOST RECENT EPISODE MI	XED SEVER				
9392	27			20			
101101-	(\$1.000); (\$1.000); (\$1.000); (\$1.000); (\$1.000);	101 0 000 T 01 14 (TEL 100)	1000000000000		05/13/2013	06/26/2014	
Primary [	Diagnosis: ATTENTION-DEFICIT/H	PERACTIVITY DISORDER I	vos				
011000	(BOARD CROBBLE) IN		No Entry		05/05/2014		
Drimony							
Filliary L	Jiagnosis.		Internation Constant		03/20/2013		
Primary L	Diagnosis: "SCHIZOPHRENIA, SCH	IZOAFFECTIVE TYPE, SUB	CHRONIC		10/07/2018		
	and the state of the second second	()) and () and () and ()	100000000000000000000000000000000000000		10/07/2013	06/25/2014	
Primary D	Diagnosis: PSYCHOTIC DISORDER	NOS					
1010111	CONTRACTOR OF A DECEMPTOR	State of the state of the state of the	GUIROY,DON		02/29/2012	06/18/2014	
Primary L	Diagnosis: BIPOLAR II DISORDER						
101001	100100000000000000000000000000000000000		101.00000000		04/03/2014	07/01/2014	
Drimony	Disansais:						
Fillinary L	Jiagnosis.	10.000			07/11/2012	07/03/2014	
						07/00/2014	
Primary L	Diagnosis: "SCHIZOPHRENIA, SCH	IZOAFFECTIVE TYPE, SUB	CHRONIC		02/21/2012		
	Contraction of Contract Vision Contract	THE PARTY OF LAND	ALC: NOT THE OWNER.		03/21/2012		
Primary L	Diagnosis: BIPOLAR II DISORDER						
Date Prin	ted: 6/16/2014	Confidential client informa	tion, see California W	elfare & Institutions	ode section 5328		Page 1 of 4
	1.1						1.1.2.1.1.1.1.1.1

## 844 Current Team List

Description	This report displays the current team assignment for the selected team
How to read the report	<ul><li>A. The name highlighted in blue is the assigned supervisor for the team.</li><li>B. The staff names that follow are the staff members assigned to this team. This also</li></ul>
	includes the start date of when the staff member became part of this team and their title.
Important Tips	<ul> <li>Be sure to notify QI of any changes such as title changes, team transfers, end of employment etc</li> </ul>

	Monter 8	ey County Behav 944 Current Team	ioral Health List		
Staff ID and Name				Start Date	End Date
Aonterey County BH					
Children System of Care					
CSOC Education Team		22			
COMPLEX AND A DESCRIPTION	inger o	22			
		Supervisor (Intern) (Intern)	LMFT MFTI LCSW MHRS or equivalent LCSW MFT (Marriage and Fam MFTI (Marriage and Fam MFTI MFTI ASW (Associate Social 1 ASW (Associate Social 1 MFTI ASW (Associate Social 1 MFTI MFTI MFTI MFTI MFTI MFTI MSW (Associate Social 1 MFTI MSW Intern MSW Intern	6/1/2017 6/1/2017 6/1/2017 6/1/2017 6/1/2017 6/1/2017 6/1/2017 6/1/2017 8/1/2017 8/1/2017 Nork6/1/2017 Nork6/1/2017 Nork6/1/2017 Nork6/1/2017 Nork6/1/2017 Nork6/1/2017 8/1/2017 8/1/2017	
		(Intern)	MSW Intern	8/1/2017	

### 845 Open Client by Region

Description	This report displays open clients by region and sorted by program. It displays the client's case coordinator, date of admission, attending practitioner, next appointment, and primary diagnosis.					
How to read the report	<ul><li>A. The program name is highlighted in blue with a distinct count of clients for that program</li><li>B. The region name is highlighted in yellow with a distinct count of clients for that region with in that program</li></ul>					
Important Tips	- On the last page of the report you will find a bar graph of count of clients by region					



#### Monterey County Behavioral Heath 845 Open clients by Region

This report shows all open client episodes grouped by Program name and Region with a distinct count of clients

PATID	Client Name	Admit date	Case Coordinator	Attending Practitioner	Next Appt
Acces	s AB109		86		
Coasta	Il Region		23		
<sup>8</sup> clien Primary	t ID Lastname,First / Diagnosis: Diagnosis deferred	06/26/17	GODINEZ, JACKIE		
client Primary	t ID Lastname,First / Diagnosis: Diagnosis deferred	08/30/17	WENDEL RICE, SABRINA		
client	t ID Lastname, First	04/06/17	GONZALEZ, RAYMOND		
Primary	Diagnosis: Methamphetamine use disord	der, severe,	dependence		
client	ID Lastname,First	09/25/17	ALLRED, JEREMY A	SIRKIN, DAVID W	
Primary	Diagnosis: Substance-induced psychotic	disorder wit	h hallucinations		
1011031	and the other constrained of the	12/22/15	GODINEZ, JACKIE	STEWART, STEPHANIE N	
Primary	/ Diagnosis: Mood disorder NOS				
101000		06/07/17	GODINEZ, JACKIE		
Primary	/ Diagnosis: Diagnosis deferred				
71998		08/30/17	GODINEZ, JACKIE		
Primary	v Diagnosis:				
101.000	OT NAMES AND ADDRESS OF	10/03/17	ALLRED, JEREMY A	SIRKIN, DAVID W	
Primary	Diagnosis: No diagnosis or condition on A	Axis I			
197180	100 CT 1 C	08/23/17	WENDEL RICE, SABRINA		
Primary	/ Diagnosis:				
18-1980	AND CONTRACTORS IN CONTRACTORS	07/14/17	WENDEL RICE, SABRINA	SIRKIN, DAVID W	
Primary	/ Diagnosis: Anxiety, generalized				
1010-012	1000 T - 2000 T - 10,0000	08/31/17	GONZALEZ, RAYMOND		
Primary	Diagnosis: Observation, suspected ment	al disorder			
80140	1 - 1 - 4 - 5 - 5 - 5 - 5 - 5 - 5 - 5 - 5 - 5	09/25/17	WENDEL RICE, SABRINA		
Primary	/ Diagnosis: Diagnosis deferred				
101111	#1	07/26/17	WENDEL RICE, SABRINA		
Primary	/ Diagnosis: Diagnosis deferred				
8.090	and the state of the	11/03/16	ALLRED, JEREMY A	SIRKIN, DAVID W	
Primary	/ Diagnosis: Amphetamine abuse				
-949-949	1911-1011-1011-0010-0010-0010	06/20/17	WENDEL RICE, SABRINA		
Primary	/ Diagnosis: Diagnosis deferred				
101110	Constant de calificacións contrats en	06/30/17	GODINEZ, JACKIE		
Primary	/ Diagnosis: Diagnosis deferred				
	The state of the second s	03/30/17	GONZALEZ, RAYMOND		
Primary	v Diagnosis: Major depressive disorder, si	ngle episode	, un specifie d		
01001	There are taken and a star	05/11/17	ALLRED, JEREMY A	SIRKIN, DAVID W	10/13/17
Primary	/ Diagnosis: Major depressive disorder				
		07/17/17	WENDEL RICE, SABRINA		

## 848 Team Analysis Report

Description	This report displays caseload numbers as well as billed
	minutes for the selected team
How to read	A. Number of Clients served displays the
the	number of clients served during the
report	selected date range
	B. Number of Services displays number of
	services rendered during selected date
	range
	C. Sum of Service minutes displays a sum of
	the service minutes billed during the
	selected date range
	D. Sum of Service value displays the sum of
	the cost for the services billed during the
	selected date range
	E. Case Coordinator displays the count of
	clients for which the practitioner is
	assigned as the case coordinator
	F. Admit Pract Caseload displays the count of
	clients for which the practitioner is
	assigned as the admitting practitioner
	G. Attend Pract Caseload displays the count of
	clients for which the practitioner is
	assigned as the attending practitioner
	H. Other Support Staff displays the count of
	client for which the practitioner is assigned
	as the other support staff
Important Tips	- The last <b>Bold</b> row displays totals for the team



1

Monterey County Behavioral Health 848 Team Analysis Report Report Date Range : 1/1/2017 to 1/15/2017 ( 14 Days )

Team Na	ame			Number of Clients Served	Number of Services	Sum of Service Minute	Sum of Service Value	Case Coord Caseload	Admit Pract Caseload	Attend Pract Caseload	Other Support Staff
1000001 (3	HELLONE HARA		Supervisor	1	1	220	\$ 1,676	0	0	0	1
Staff ID's	and Staff Names	ASW		15	30	1,440	\$ 6,079	26	26	0	0
100107 1	AL ORDER CONTRACTOR	ASW		32	70	2,551	\$ 8,117	47	49	0	1
00345 1		ASW		7	10	860	\$ 317	52	53	0	0
Totals				55	111	5,071	\$ 16,188	125	128	0	2

10/12/2017

## 849 Open Client by Program

Description How to read the report	<ul> <li>This report displays a list of clients that currently have an open episode to the selected program(s)</li> <li>A. Displays each clients assigned case coordinator, the client's ID, date of admission, client name, length of stay in days, last date of service, admitting practitioner and attending practitioner.</li> </ul>
	practitioner and attending practitioner
Important Tips	<ul> <li>Length of stay in days is calculated from date of admission to the date the report is pulled</li> </ul>



Monterey County Health Department Behavioral Health Bureau 849- Open Clients by Program

Case Coordinator	Client ID	Admission Date	Client Name	Lenght of Stay (days)	Last Date of Service	Admitting Practitioner	Attending Practition
GODINEZ, JACKIE	HARAFT.	6/26/2017	(BIMARCING)	108	7/18/2017	GODINEZ, JACKIE	No Entry
GONZALEZ, RAY MOND	1001001	9/8/2017	ALCONTRACTOR .	34	9/18/2017	GONZALEZ, RAYMOND	No Entry
WENDEL RICE, SABRINA	1080901	9/25/2017	ARRIVED AVAILABLE AVAILABL	17	9/25/2017	WENDEL RICE, SABRINA	No Entry
WENDEL RICE, SABRINA	100007	8/30/2017	WING OF BUILD	43	9/18/2017	WENDEL RICE, SABRINA	No Entry
GONZALEZ, RAY MOND	1001001	5/11/2017	INDEREST AND ADDRESS OF T	154	10/12/2017	GONZALEZ, RAY MOND	SIRKIN, DAVID W
GONZALEZ, RAY MOND	1789931	4/20/2017	1811 ( Add.) ( Mail 1011 ( Add.)	175	9/14/2017	GONZALEZ, RAYMOND	No Entry
GODINEZ, JACKIE	10001111	7/5/2017	HE FRAME CONTRACTOR	99	9/12/2017	GODINEZ, JACKIE	No Entry
GONZALEZ, RAY MOND	1031631	4/6/2017	1817. (APProx.) (APProx.)	189	9/22/2017	GONZALEZ, RAYMOND	No Entry
WENDEL RICE, SABRINA	1080531	9/22/2017	18.00001.000010	20		WENDEL RICE, SABRINA	No Entry
ALLRED, JEREMY A	1839791	9/25/2017		17	9/25/2017	ALLRED, JEREMY A	SIRKIN.DAVID W
GODINEZ, JACKIE	1021801	12/22/2015	ALCON	660	6/8/2017	GODINEZ, JACKIE	SIRKIN.DAVID W
WENDEL RICE, SABRINA	1786816	7/17/2017	TANKI (ARR) MARKE	87	9/25/2017	WENDEL RICE, SABRINA	No Entry
WENDEL RICE, SABRINA	10310841	8/30/2017		43	9/22/2017	WENDEL RICE, SABRINA	No Entry
WENDEL RICE, SABRINA	151185	7/17/2017	- Indonesti (Barrisha and	87	9/28/2017	WENDEL RICE, SABRINA	No Entry
WENDEL RICE, SABRINA	198023	6/20/2017	- Indone Million - Addaha - In-	114	10/4/2017	WENDEL RICE, SABRINA	SIRKIN, DAVID W
GODINEZ, JACKIE	1946946	6/2/2017	1001-100-01040F101A	132	10/10/2017	GODINEZ, JACKIE	SIRKIN, DAVID W
GODINEZ, JACKIE	1238031	6/7/2017	101 (011 1 ( 00) ( 00 ( ( 1 ) 1	127	9/6/2017	GODINEZ, JACKIE	No Entry
GONZALEZ, RAY MOND	10.010.011	3/16/2017	101/1010-0010-0010-0010-0010-0010-0010-	210	9/14/2017	GONZALEZ, RAYMOND	No Entry
GONZALEZ, RAY MOND	1111000	3/16/2017	1101001001001000010	210	9/7/2017	GONZALEZ, RAYMOND	No Entry
ALLRED, JEREMY A	1080881	6/14/2017	STREET, PRANTER F	120	8/22/2017	ALLRED, JEREMY A	No Entry
GONZALEZ, RAY MOND	197989	9/18/2017	100000.000	24	9/29/2017	GONZALEZ, RAY MOND	No Entry
GODINEZ, JACKIE	/931881	8/30/2017	THE PROPERTY OF CONTRACTORS	43	8/30/2017	GODINEZ, JACKIE	No Entry
ALLRED, JEREMY A	1031781	10/3/2017	MANNET MANAGES	9	10/6/2017	ALLRED, JEREMY A	SIRKIN, DAVID W
ALLRED, JEREMY A	100780	3/17/2017	TRANSPORT TRANSPORT	209	9/20/2017	ALLRED, JEREMY A	SIRKIN.DAVID W
ALL RED. JEREMY A	-68194-	9/20/2016	HARRIST	387	10/6/2017	ALLRED, JEREMY A	SIRKIN.DAVID W

### 850 Staff Non Caseload Client Access

Description	This report displays client ID's accessed by the staff member selected which are not with in the staff members caseload
How to read the	<ul> <li>Access date is the date the staff member accessed the client record</li> </ul>
report	<ul> <li>B. Access time is the time the staff member accessed the client record</li> <li>C. Access reason is the information entered by the staff when asked by Avatar what is the reason they are accessing this client</li> </ul>
Important Tips	<ul> <li>Use this report when is suspected or reported that a staff member has been accessing a client chart that should not have been accessed</li> <li>Be sure to notify QI of these reports as well</li> </ul>



Monterey County Behavioral Health 850 Staff Non Caseload Client Access Staff Name: Date Range: 1/1/2017 TO 5/1/2017

	PATID	Access Time	Access Reason
Access Date: 2/28/2017			
	10.000.000	03:31 PM	new client t tis clinician's caseload
	<b>WARRAN</b>	03:45 PM	new access client this clinician's caseload.
Access Date: 1/31/2017			
	1631801	05:27 PM	this therapist is new client's assigned therapist
	1031001	05:28 PM	this clinician has been assigned to new access client
A A loc loos 7			
Access Date: 1/26/2017			
	10.01001	01:25 PM	new client to th thrapists caseload
	1031001	01:33 PM	nw clieent to this writers caseload
Access Date: 1/17/2017			
Access Date. 1/17/2017			
	10.07781	09:33 AM	new client to my caseload
	10.27740	09:34 AM	new client to my caseload
Access Date: 1/16/2017			
			where we have the state of the
	10.07781	11:54 AM	This writer has been newly assigned to this parent client.
	10.07781	11:56 AM	new client to this writers caseload
	10.07781	11:56 AM	new client to this writers caseload.
	10.07781	12:01 PM	New client to this writer's caseload
	10.01744	12:49 PM	new collateral client
	10.217.2461	01:26 PM	new collateral client

### 857 Missing CSI Data by Program

Description	This report displays CSI Information for current open
	client in the selected program
How to read	A. Look for the "data missing" red text in the
the	columns. This tells you the client does not
report	have any CSI data entered for this program
Important	- Keep an eye out for staff members selecting
Tips	"unknown" for most of the questions



**857 Missing CSI Data by Program** This report shows all of the epibode openings that need (SI data by program. Data shown below in red is required, if missing please go to CWS-clinical Menu ->CSI data - then complete fields

lient	Episod	e Program	First Name	last name	Mother's Name	school	Legal	Fiscally	Special Population	Ethnicity
)#	#	-					-	Responsible County		
taff r	nam	e								
	18	Access AB109	1010.000	10.00010-00	1000	No School Info	Voluntary	Monterey	No special population serv	Not Hispanic or Latino
1010	14	Access AB109	11100	10000	10100	No School Info	Voluntary	Monterey	No special population serv	Hispanic or Latino
1118	1	Access AB109	Excellent root	18100	10000000	No School Info	Voluntary	Monterey	No special population serv	Hispanic or Latino
1110	з	Access AB109	1811	18/18	1000000	No School Info	Voluntary	Monterey	No special population serv	Hispanic or Latino
	з	Access AB109	40.00		Trippet in 1	No School Info	Unknown/I	Monterey	No special population serv	Hispanic or Latino
	10	Access AB109	dan ki	10.000	181	No School Info	Voluntary	Monterey	No special population serv	Not Hispanic or Latino
	1	Access AB109	1001	That is a set	1888	No School Info	Voluntary	Monterey	No special population serv	Hispanic or Latino
1000	8	Access AB109	1000	100002	1940	No School Info	Voluntary	Monterey	No special population serv	Not Hispanic or Latino
1000	1	Access AB109	E-MARKED	10000	10.00	No School Info	Voluntary	Monterey	No special population serv	Not Hispanic or Latino
1110	5	Access AB109	CONTRACTOR OF THE	1000	1000100	No School Info	Voluntary	Monterey	No special population serv	Unknown / Not Report
1986	з	Access AB109	NAME:	10	1000	No School Info	Voluntary	Monterey	No special population serv	Not Hispanic or Latino
110	4	Access AB109	0.000	<b>Annual</b>	1000000	No School Info	Voluntary	Monterey	No special population serv	Not Hispanic or Latino
110	8	Access AB109	0.000	The second	100000	No School Info	Voluntary	Monterey	No special population serv	Not Hispanic or Latino
1000	з	Access AB109	office.	18010	100000	No School Info	Voluntary	Monterey	No special population serv	Unknown / Not Report
1010	з	Access AB109	1811	101008	10000	No School Info	Voluntary	Monterey	No special population serv	Hispanic or Latino
1118	9	Access AB109	1000	-Revenue	These and	No School Info	Voluntary	Monterey	No special population serv	Hispanic or Latino
1000	4	Access AB109	100.00	19810	100100	No School Info	Voluntary	Monterey	No special population serv	Not Hispanic or Latino
1000	4	Access AB109	Fast:	Tradition (	1948	No School Info	Voluntary	Monterey	No special population serv	Hispanic or Latino
Staff	nan	ne								
- call	26	Access AB109	10.00	(Annual)	1010803	No School Info	Voluntary	Monterey	No special population serv	Not Hispanic or Latino
1000	8	Access AB109	144984	19810	10101	No School Info	Voluntary	Monterey	No special population serv	Hispanic or Latino
10.00	4	Access AB109	(And the second	10100	1000000	No School Info	Voluntary	Monterey	No special population serv	Not Hispanic or Latino
1111	5	Access AB109	<b>HALLER</b>	10100	1981	No School Info	Voluntary	Monterey	No special population serv	Not Hispanic or Latino
	11	Access AB109	data missing	data missing	data missing	data missing	data missin	data missing	data missing	data missing
and the second se	1	Access AB109	1007004	1000	10000	No School Info	Other invol	Monterey	No special population serv	Unknown / Not Report
			(Address of the owner)	No. of Concession, Name	(April 1)	No School Info	Voluntary	Monterey	No special population serv	Hispanic or Latino

858 Program S	Service Information by Service Type
Description	This report displays service summary information by
	service type
How to read	A. Count of clients displays count of clients
the	served during the selected date range
report	B. Count of services displays the count of
	services rendered
	C. Sum of duration displays the sum of
	minutes billed to each type of service
	D. Sum of service value displays the sum of
	cost for each type of service
Important	- Overridden to non billable row displays services
Tips	that have been switched to 330 due to charts
	being out of compliance
	- Disallowed row displays services disallowed by

QI

Program:

Monterey County Health Department Behavioral Health Bureau 858 Program Service Information by Service Type

#### SERVICE INFORMATION BY TYPE OF SERVICE

Date Range: 1/1/2017 to 10/12/2017

	Count of Clients	Count of Services	Percent of Services	Sum of Duration	Sum of Service Value
Assessment/Evaluation	180	440	14%	38,165	\$171,972
Disallowed	2	2	0%	2	\$0
Group Counseling	18	106	3%	15,143	\$41,757
Linkage/Brokerage	166	553	18%	17,128	\$67,998
Medication Support	27	77	2%	2,681	\$25,389
Mental Health Counseling	275	894	30%	46,006	\$236,011
Non Billable Activity	188	633	21%	11,891	\$0
Overriden to Non-Billable	98	233	7%	6,733	\$0
Total	326	2,938	100%	137,749	\$543,127

#### SERVICE CODES CONTRIBUTING TO EACH TYPE OF SERVICE

Assessment/E	ivaluation
331	Assessment and Evaluation
332	Assessment 26.5
335	No MN Assessment 26.5
336	Triage Assessment
391	Plan Development
392	Plan Development 26.5
395	No MN Plan Development 26.5
431	No MN Assessment
491	No MN Plan Development
90801	Evaluation / Assessment
A331	ADP Assessment
CHS331	Assessment and Evaluation CHS
Board and Ca	re
188	Board+Care Intensive Special Need L1
189	Board+Care Intensive Spec need Level II
194	BC Room and Board Intensive Care

## 864 Clts w/o Svc for 60 Days By MD

Description	This report displays clients by attending practitioner
	who have not received services in over 60 days
How to read	A. This report can be used to identify clients
the	who may need to be discharged or may
report	need to be contacted to schedule an
	appointment for follow up



Monterey County Health Department Behavioral Health Bureau 864 Clients w/out Services for 60 days by Attending Practitioner

PATID EP# Progr	am Name	Date I	Last DOS	Service	Practitioner	Practitioner	Program Name	# of Opened Episodes	DOS	Days Since Last Service
CONSTRUCTION OF THE OWNER										
3 Rebeka	h Children 's Services Wrap	02/09/15	04/14/16	546						546
and the second second										
ZADP G DrugCt	enesis Residential Adult	12/09/13	12/23/13	1,389						1,389
Innanan 6 ZADP G	en esis Residential	12/20/13	05/28/14	1,233						1,233
nonnon 7 Rebeka	h Children 's Services Wrap	03/17/14	05/01/14	1,260						1,260
		0.0 10 5 10 0	05.04.47							
3 DIHM	251ARI 6-11	03/15/16	05/04/17	161		100000000000000000000000000000000000000	00 10007 407 0 - 0	•	10.047	101
2 DTHM	STARL 0-11	06/18/15	09/24/17	141			CS MUSI ART U to o	2 D 3	10/0/17	0
2 01111	JOTAKI OFTI DOEG	00/10/15	00/00/17	0.5		Contract of Constructions	Co Lincoln Elementary IE	r J	10/11/1	
A PER COMPANY AND A COMPANY										
5 AS Sali	as Med Support	11/17/16	05/24/17	141						141
2 49 9-6	an Outpatient	08/29/05	08/04/17	69						60
2 70 081		00/23/03	00/04/11							03
0.000110000110										
1 DTHFa	milies First and Foremost	02/22/17	08/09/17	64						64
AC										
ALC: NO. 1 (1999)										
nonnon 1 CS Sec	ure Families	06/15/17	07/25/17	79						79
7		10/20/15	02/21/16							
<u>11_COMHS</u>	T Deserves and the state of the	10/30/13	07/10/17	04	and an and a second second	TANK OF A DATE OF A DATE.	Robeksh Children's Sanis		9/20/17	300
II COPAG	T Dependency Unit	10/03/10	07/10/17	34	THE PROPERTY.	- MILL	Wrap	.cs 2	0/30/11	40
7 CS MH	A TIP Avanza SYSDEV	06/28/16	07/26/17	78						78
			MON	ITEREY (	OUNTY BEHAVIO	DRALHEALTH			10/12	/2017
1			С	ONFIDEN	TIAL CLIENT INF	ORMATION				

## 869 Clients Admitted by Program

Description	This report displays a list of clients admitted to the					
	selected program for the selected date range					
How to read	A. This report can be used to view a history of					
the	the clients admitted to a program for any					
report	given date range					
Important	- Note: this is not current open clients					
Tips	- It displays clients where there admission date is					
	between the date range selected					



Monterey County Health Department Behavioral Health Bureau 869- Clients Admitted by Program

Behavioral Health Bureau 869- Clients Admitted by Program
Date Range: 1/1/2017 to 10/12/2017

Total number of clients: 41							
Client ID	Admission Date	Discharge Date	Client Name	Lenght of Stay (days)	Last Date of Service	Admitting Practitioner	Attending Practitioner
1101011	4/6/2017		100000010001000000000000000000000000000	189		- INCOMPTENDED IN COMPANY	INSTRUCTION CONTRACTOR CONTRACTOR
/130980	8/30/2017			43		ALMORT CONTAINANT	PROBATION CONTRACTOR CONTRACTOR
103454	7/26/2017			78		ALCOHOL: MANAG	PROFESSION OF THE OWNER OF THE OWNER
1897331	8/23/2017			50		CONTRACTO (CONTINUE)	(BB (1999a)
100000-	5/17/2017		HERE HAR PERMIT	148		CENTRAL CONTRACTOR	PROFESSION OF THE OWNER OF THE OWNER
/130801	7/26/2017		- Elizabeth - Englished	78	7/26/2017	100 - 100 -	PRESS
-140000	4/24/2017		- BORNELLER BORN, 1980 - 108,000 - 101	171		CERTIFICATION CONTRACTOR	PROFESSION OF THE OWNER.
1738931	1/30/2017		111100000.0000000	255		CENTRAL CONTRACTOR	PROBATION CONTRACTOR AND INCOME.
1021201	8/2/2017		100000000000000000000000000000000000000	71	10/4/2017	ALMONT CONTRACTO	PROBLEM CONTRACT CONTRACTOR
100107	9/1/2017		1000.000.0000.0000000000000000000000000	41		ALMORT COMMANNESS	188 (1999a)
1984990	3/7/2017		and the state of the second se	219		CONTRACT CONDITION	
	4/27/2017		secondary - restaurants	168		CENTRAL CONTRACTOR	PROBATION CONTRACTOR AND INCOME.
178028t	7/12/2017		THE ARE CERTIFICATION.	92	10/10/2017	ALCOHOL: MARKED	The state of the s
1007331	2/15/2017		(84)(1864)(1)(1)(1)(1000)(1)	239		CERTAIN CONTRACTOR	PROFESSION OF THE OWNER.
1477980	3/8/2017		100100-00/00/0010010	218		CERTAIN CONTRACTOR	PROBATION CONTRACTOR CONTRACTOR
13977	2/8/2017		1000-000-001-000-000-000-001-000-001-000-00-	246		ALMERT, MURIPHIELD	PROFESSION OF THE OWNER OF THE OWNER
19480	3/16/2017		(delega indelega	210	5/12/2017	CERTIFICATION OF THE PARTY OF	PROFESSION OF THE OWNER OF THE OWNER
1011110	9/5/2017		44-100/08-11-10-10-1	37		ALMORT CONTAINANT	(BB (19494))
1887311	4/13/2017		101/061/0610981	182		CONTRACTO (BOTTO)	PRESS AND ADDRESS OF ADDRESS OF
1000000	1/4/2017		100,0001117,000,01112,000	281		CENTRAL CONTRACTOR	PROVIDE LAW OR ARE CONSIDERED.
11/081	7/24/2017		18961.00170085.0000	80		ALMERT ORIGINAL	The same of the state of the st
1012011	4/20/2017		100.00000000000000000000000000000000000	175		CONTRACT & UNDER THE	PRESS CONTRACT CONTRACT
17888.01	3/9/2017		100 FT 6 C FT 100 - 10 F0 FT 00 FT 10 FT	217		CENTRAL CONTRACTOR	PRESIDENT OF PERMIT OF PERMIT
/71189/	1/30/2017			255		- BIOMPER DEPEND	PROFESSION AND TRACTORS AND ADDRESS OF ADDRE
10,001,000	7/12/2017		and a construction of a filter	92		1810-102-01-10-00-00-00	PRESS AND ADDRESS OF ADDRESS OF
Print Date : 10/1			MONTEREY CONFIDE	COUNTY BEHAV	IORAL HEALTH		Page Number: 1