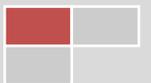


2018

QI Supervisor Report Guide



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.

How to read the report

- A. The sub heading displays the staff member name. The clients listed under each practitioner are open clients.
- 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.

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. The goal is to eliminate the red items

Missing CSI data report

This report shows all of the episode openings that need CSI data
Data shown below in red is required, if missing please go to CWS→Clinician Menu -> CSI data - then complete fields

Client ID #	Episode #	Program	first name	last name	Mother's Name	school	Legal	financially responsible co.	Special Population	Ethnicity
ASOC, Salinas Valley Team 1										
Staff Name										
	2	CS FAST Dependency Ur				Salinas City	Voluntary	Monterey	(AB 3632) Individualized e	Unknown / Not Ri
	1	CS FAST Dependency Ur				No SchoolInfo	Voluntary	Monterey	No special population serv	Hispanic or Latino
	2	CS FAST Dependency Ur				No SchoolInfo	Voluntary	Monterey	No special population serv	Hispanic or Latino
	2	CS FAST Dependency Ur				No SchoolInfo	Voluntary	Monterey	No special population serv	Hispanic or Latino
	2	CS FAST Dependency Ur				No SchoolInfo	Voluntary	Monterey	No special population serv	Hispanic or Latino
	2	CS FAST Dependency Ur				No SchoolInfo	Voluntary	Monterey	No special population serv	Hispanic or Latino
Staff Name										
	7	AS Salinas Outpatient				No SchoolInfo	Voluntary	Monterey	Welfare-to-work plan spec	Not Hispanic or La
	11	AS Salinas Outpatient				No SchoolInfo	Voluntary	Monterey	No special population serv	Not Hispanic or La
	3	AS Salinas Outpatient				No SchoolInfo	Voluntary	Monterey	No special population serv	Not Hispanic or La
	6	AS Salinas Outpatient				No SchoolInfo	Voluntary	Monterey	No special population serv	Hispanic or Latino
	24	AS Salinas Outpatient				No SchoolInfo	Voluntary	Monterey	No special population serv	Not Hispanic or La
	6	AS Salinas Outpatient				No SchoolInfo	Voluntary	Monterey	No special population serv	Not Hispanic or La
	4	AS Salinas Outpatient				No SchoolInfo	Voluntary	Monterey	No special population serv	Hispanic or Latino
	7	AS Salinas Outpatient				No SchoolInfo	Voluntary	Monterey	No special population serv	Hispanic or Latino
	6	AS Salinas Outpatient				No SchoolInfo	Voluntary	Monterey	No special population serv	Hispanic or Latino
	7	AS Salinas Outpatient				No SchoolInfo	Additional 34 C	Monterey	No special population serv	Not Hispanic or La
	9	AS Salinas Outpatient				No SchoolInfo	Voluntary	Monterey	No special population serv	Not Hispanic or La
	7	AS Salinas Outpatient				No SchoolInfo	Voluntary	Monterey	No special population serv	Not Hispanic or La
	11	AS Salinas Outpatient				No SchoolInfo	Other involunt	Monterey	Governor's Homeless Initi	Not Hispanic or La
	6	AS Salinas Outpatient				No SchoolInfo	Voluntary	Monterey	No special population serv	Not Hispanic or La
	6	AS Salinas Outpatient				No SchoolInfo	Voluntary	Monterey	No special population serv	Not Hispanic or La
	22	AS Salinas Outpatient				Carmel USD	Voluntary	Monterey	No special population serv	Not Hispanic or La
	7	AS Salinas Outpatient				No SchoolInfo	Voluntary	Monterey	No special population serv	Not Hispanic or La
	5	AS Salinas Outpatient				No SchoolInfo	Voluntary	Monterey	No special population serv	Unknown / Not Ri
	10	AS Salinas Outpatient				No SchoolInfo	Voluntary	Monterey	No special population serv	Hispanic or Latino
	11	AS Salinas Outpatient				No SchoolInfo	Voluntary	Monterey	No special population serv	Hispanic or Latino
	8	AS Salinas Outpatient				No SchoolInfo	Voluntary	Monterey	No special population serv	Hispanic or Latino

5/14/2014 - Page 1 of 5 - Confidential Patient Information See California Welfare and Institutions Code Section 5328

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 report	The information is grouped by the team, then by the admitting practitioner.
Important Tips	You can drill down by clicking on the staff name



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

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

ASOC, Salinas Valley Team 1					
EDEZA,HILDA					
PATID	Client Name	Date of Birth	Age	Admit Date	Program
0001	63	1/20/1996	AS Salinas Outpatient
0002	59	3/17/2008	AS Salinas Outpatient
0003	74	7/1/2008	AS Salinas Outpatient
0004	54	8/30/2011	AS Salinas Outpatient
0005	30	4/24/2012	AS Salinas Outpatient
0006	60	1/16/2014	AS Salinas Outpatient
0007	38	3/13/2015	AS Salinas Outpatient
0008	51	9/29/2015	AS Salinas Outpatient
0009	60	11/24/2015	AS Salinas Outpatient
0010	33	6/6/2016	AS Salinas Outpatient
0011	64	9/21/2016	AS Salinas Outpatient
0012	48	12/6/2016	AS Salinas Outpatient
0013	29	1/17/2017	AS Salinas Outpatient
0014	32	2/16/2017	AS Salinas Outpatient
0015	49	3/7/2017	AS Salinas Outpatient
0016	54	5/11/2017	AS Salinas Outpatient
0017	28	6/19/2017	AS Salinas Outpatient
0018	43	6/29/2017	AS Salinas Outpatient
0019	58	10/12/2017	AS Salinas Outpatient
0020	32	10/12/2017	AS Salinas Outpatient
0021	56	12/6/2017	AS Salinas Outpatient
0022	48	1/16/2018	AS Salinas Outpatient
0023	39	2/2/2018	AS Salinas Outpatient
0024	31	2/9/2018	AS Salinas Outpatient

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 expire soon
 - II. **The client does not have a treatment plan**= Client needs a treatment plan
 - III. **Compliant**= Client has a finalized plan for the year
 - IV. **Duration in red**= The duration exceeds 365 days and needs to be corrected

Important Tips

- Every client should have one finalized treatment plan every year and one draft (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.



Annual Plans Organized by Month and Case Coordinator

Team : ASOC,CSOC Team

January

Staff Name	CLIENT ID	Plan Name	Plan Date	End Date	Duration	Plan Status
		2014 Plan 1	01/23/2014	12/31/2014	342	Draft
		This client does not have a treatment plan				
Staff Name	CLIENT ID	Plan Name	Plan Date	End Date	Duration	Plan Status
		2014 Plan 1	01/02/2014	1/30/2015	393	Final
		2014 Plan 2	01/02/2014	1/30/2015	393	Draft
Staff Name	CLIENT ID	Plan Name	Plan Date	End Date	Duration	Plan Status
		2014	01/01/2014	12/31/2014	364	Pending Approval
Staff Name	CLIENT ID	Plan Name	Plan Date	End Date	Duration	Plan Status
		2014	01/01/2014	12/31/2014	364	Final
		2014-A	01/01/2014	12/31/2014	364	Draft
		2014	01/01/2014	12/31/2014	364	Pending Approval
		2014	01/31/2014	12/31/2014	334	Final
		2014-A	01/31/2014	12/31/2014	334	Draft
		2014	01/30/2014	12/30/2014	334	Final
		2014-A	01/30/2014	12/31/2014	335	Draft
Staff Name	CLIENT ID	Plan Name	Plan Date	End Date	Duration	Plan Status
		2014	01/01/2014	12/31/2014	364	Final
		2014	01/22/2014	12/31/2014	343	Final

February

Staff Name	CLIENT ID	Plan Name	Plan Date	End Date	Duration	Plan Status
		2014 Plan 1	03/01/2014	2/28/2015	364	Draft
		2014 Plan 1	02/26/2014	1/30/2015	338	Final
		2014 Plan 2	02/26/2014	1/30/2015	338	Draft

803 Team 72 Hour Rule

Description

This report can be used to monitor 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 click on the practitioner to see additional details about notes written

How to read the report

- A. This report is sorted by clinician's assigned to your team
- B. It has a count of notes written, count of notes written three work days after date of service, and a percentage of notes written after 72 business hours.
- C. This report also shows percent of notes tied to an Evidence Based Practice

Important Tips

- Double click on any of the numbers listed under the clinician name to view the details. This will give you a list of the clients that account for these numbers, date of service, date of note entry, days difference, and work days difference
- We usually run this report for the previous full month because then it reflects the very late notes.
- The report date parameters are based on the date of service not the date of data entry.
- Running the report for a recent time frame will show compliance because the late entry services have not yet been entered.



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

Team: **TEAM Name**

Staff Name		Percent of Notes Tied to an Evidence-Based Practice
Staff Name 1		
Count of all notes written in the time period	34	-None 100%
Count of notes written three work days after date of service	8	
Percentage of notes written after 72 business hours	24%	
Staff Name 2		
Count of all notes written in the time period	24	-None 100%
Count of notes written three work days after date of service	5	
Percentage of notes written after 72 business hours	21%	
Staff Name 3		
Count of all notes written in the time period	15	-None 100%
Count of notes written three work days after date of service	6	
Percentage of notes written after 72 business hours	40%	
Staff Name 4		
Count of all notes written in the time period	24	-None 100%
Count of notes written three work days after date of service	0	
Percentage of notes written after 72 business hours	0%	
Count of all notes written in the time period	44	-None 100%
Count of notes written three work days after date of service	5	
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	<p>A. Look for your team name (scroll down or go to the next page for more team names)</p> <p>B. Look at the staff listed under the team to verify names, titles, start date and end date are accurate</p>
Important Tips	<ul style="list-style-type: none"> - 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) - Notify the QI team if your staff member has an inaccurate title by submitting an error report under the Staff Assignment type -



MONTEREY COUNTY BEHAVIORAL HEALTH

Staff Organized by Team

Staff ID	Staff Name	Title	Intern	Start Date	End Date
000000	000000,000000	Psychologist	No	00/00/0000	
000001	000000,000000,00	Administrative	No	00/00/0000	
000002	000000,000000,000000,000000	MFT (Strategic and Family Therapy)	No	00/00/0000	
000003	000000,000000,000000	MFT (Strategic and Family Therapy)	No	00/00/0000	
Management Team					
000004	000000,000000	LCMHC Supervisor (Strategic and Family Therapy)	No	00/00/0000	
Supervisory team					
000005	000000,000000	MFT (Strategic and Family Therapy)	No	00/00/0000	
000006	000000,000000,000000	MFT (Strategic and Family Therapy)	No	00/00/0000	
000007	000000,000000	MFT (Strategic and Family Therapy)	No	00/00/0000	
000008	000000,000000,000000	Administrative	No	00/00/0000	
000009	000000,000000	MFT (Strategic and Family Therapy)	No	00/00/0000	
000010	000000,000000	MFT (Strategic and Family Therapy)	No	00/00/0000	
000011	000000,000000	MFT (Strategic and Family Therapy)	No	00/00/0000	
Supervisory team					
000012	000000,000000,000000,00	MFT (Strategic and Family Therapy)	No	00/00/0000	00/00/0000
Supervisory team					
000013	000000,000000	MFT (Strategic and Family Therapy)	No	00/00/0000	
000014	000000,000000,000000	MFT (Strategic and Family Therapy)	No	00/00/0000	
000015	000000,000000,00	Psychologist	No	00/00/0000	00/00/0000
000016	000000,000000	LCMHC Supervisor (Strategic and Family Therapy)	No	00/00/0000	
000017	000000,000000,000000,00	MFT (Strategic and Family Therapy)	No	00/00/0000	
000018	000000,000000,000000	MFT (Strategic and Family Therapy)	No	00/00/0000	
000019	000000,000000,000000	MFT (Strategic and Family Therapy)	No	00/00/0000	00/00/0000
000020	000000,000000	MFT (Strategic and Family Therapy)	No	00/00/0000	

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



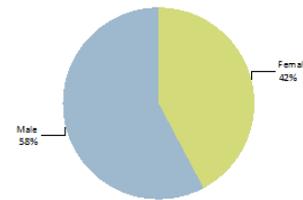
Monterey County Behavioral Health Program Summary: [REDACTED]

Number of clients currently active in program: 19

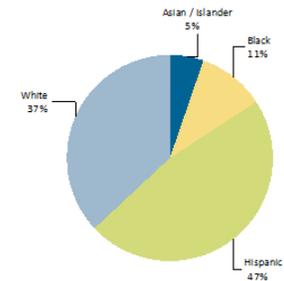
Average Client Current Age: 33

Current Age Range Served: 20 to 54

GENDER



ETHNICITY



		16-25		26-59		Total	
Female	Black	0	0%	1	16%	1	12%
	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 Important Tips

- A. This report is by staff member. It displays non billable time by date with notes.
- 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 --> CLINICIAN MENU --> Error Reporting)				
Appointment Date	Service Code	Service Description	Duration	Notes
Team Name [REDACTED]				
Staff [REDACTED]				Total Non Billable time: 3,252.00
1/2/2014	803	Vacation/Sick	480.00	[REDACTED]
1/3/2014	803	Vacation/Sick	480.00	[REDACTED]
1/6/2014	802	UR/QI Review	105.00	[REDACTED]
1/6/2014	811	Outreach & Encagement	7.00	[REDACTED]
1/7/2014	811	Outreach & Encagement	5.00	[REDACTED]
1/7/2014	802	UR/QI Review	90.00	[REDACTED]
1/8/2014	811	Outreach & Encagement	10.00	[REDACTED]
1/9/2014	802	UR/QI Review	150.00	[REDACTED]
1/10/2014	811	Outreach & Encagement	210.00	[REDACTED]
1/13/2014	806	Training	480.00	[REDACTED]
1/14/2014	811	Outreach & Encagement	60.00	[REDACTED]
1/16/2014	802	UR/QI Review	120.00	[REDACTED]
1/22/2014	811	Outreach & Encagement	30.00	[REDACTED]

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 the report

- A. This report is sorted by clinician
- B. You will see the total time the clinician entered 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 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.
- 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

- A. This report is sorted by admitting practitioner
- B. This report displays the clients who are missing an admission diagnosis. This section also shows the last date of service and the potential loss for each client

Important Tips

- 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.
- 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.
- All clients must have an admission diagnosis for each episode. The admission diagnosis date should default to the date the episode opening date

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 episode 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



ASOC CSOC TEAM

Staff Name							
PATID	EP#	Admit Date	Disch Date	Last Date of Service	Admitting Practitioner	Program	Potential Loss
[REDACTED]	5	5/7/2014	5/9/2014	5/9/2014	[REDACTED]	[REDACTED]	\$ 1,812.36
Number of clients 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 style="list-style-type: none"> A. Displays Supervisor name with a total client count of all UR's completed by their team. B. Displays Staff name with a client count for each client reviewed regardless of review status. C. Displays <ul style="list-style-type: none"> a. client ID b. review type c. date reviewed d. review status e. program
Important Tips	You may double click on staff name to drill down and 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	Review Type	Review Date	Status	Program	Total:	5
BATES, REGINA						Total:	3
			12/05/17	Draft	Access To Treatment Coastal Region		
			12/22/17	Final	Access To Treatment Coastal Region		
	Annual		12/27/17	Final	Access To Treatment Coastal Region		
O'LEARY, LINDSEY						Total:	1
	Admit		08/29/17	Final	Access To Treatment Coastal Region		
ROSA, ENA						Total:	1
			12/05/17	Draft	Access To Treatment Coastal Region		

810 Clients Without Services

Description

This report can be used to view clients who are not receiving services and may need to be discharged. This report is organized by program and admitting practitioner. Please review the clients in your program who are listed as not receiving services.

How to read the report

- A. This report is sorted by admitting practitioner
- B. This report displays all clients open with no services. It also displays the date of admission and the episode number.

Important Tips

- Clients who are listed as not having services who 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

Client ID	Client Name	EPISODE #	Admit Date
Current Open Clients That Do Not Have Services Entered Sorted By Program, Admitting Practitioner and Episode Opening Date			
Program: MR Therapeutic Case Mgmt Therapy			Count of Clients: 8
Admit Practitioner Name: WILLIAMSON, W			count of clients: 8
10000	WILLIAMSON, W	1	08/01/2011
10001	WILLIAMSON, W	1	08/01/2011
10002	WILLIAMSON, W	2	08/01/2011
10003	WILLIAMSON, W	2	08/01/2011
10004	WILLIAMSON, W	3	08/01/2011
10005	WILLIAMSON, W	3	08/01/2011
10006	WILLIAMSON, W	4	08/01/2011
10007	WILLIAMSON, W	4	08/01/2011
10008	WILLIAMSON, W	5	08/01/2011
Program: MR High Trig Blood Support			Count of Clients: 3
Admit Practitioner Name: WILLIAMSON, W			count of clients: 3
10009	WILLIAMSON, W	1	08/01/2011
10010	WILLIAMSON, W	2	08/01/2011
10011	WILLIAMSON, W	3	08/01/2011
Program: MR High Trig Subsequent Treat			Count of Clients: 2
Admit Practitioner Name: WILLIAMSON, W			count of clients: 1
10012	WILLIAMSON, W	1	08/01/2011
Admit Practitioner Name: WILLIAMSON, W			count of clients: 1
10013	WILLIAMSON, W	1	08/01/2011

811 Staff Services by Billing Code

Description	<p>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</p>
How to read the report	<p>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.</p> <p>B. Displays total minutes billed for the selected time frame and a total of hours and minutes at the bottom of the report</p> <p>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)</p>
Important Tips	<ul style="list-style-type: none"> - This will help you to evaluate the amount of billable time your staff has on a monthly basis - 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



Monterey County Behavioral Health
Staff Productivity Broken Down by Billing Code

Staff: XXXXXXXXXX Report Date Range: 1/1/2014 to 2/1/2014
 Staff ID#: XXXXXX

Service Code:	Linkage/Brokerage	Total Minutes Billed	Average Per Session
301	Linkage/Brokerage	345	49
330	Non Billable Activity	20	10
351	MH Group Rehab Counseling	1,396	70
381	Mental Health Rehab	2,962	165
391	Plan Development	20	20

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

813 Clients w/o 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
Important Tips

- A. This report is organized by program
- B. Below that is a list of the clients missing a case coordinator
- To assign a case coordinator go to “Client case coordinator” form and assign a start date and a clinician.
- Only one active case coordinator is allowed per client



Monterey County Health Department
Behavioral Health Division
813 Clients without a Case Coordinator by Program

Total: 2						
Client ID	Episode #	Admission Date	Admitting Practitioner	Attending Practitioner	Last Date of Service	Client Name
Total: 1						
Client ID	Episode #	Admission Date	Admitting Practitioner	Attending Practitioner	Last Date of Service	Client Name
Total: 2						
Client ID	Episode #	Admission Date	Admitting Practitioner	Attending Practitioner	Last Date of Service	Client Name
Total: 1						
Client ID	Episode #	Admission Date	Admitting Practitioner	Attending Practitioner	Last Date of Service	Client Name
Total: 2						
Client ID	Episode #	Admission Date	Admitting Practitioner	Attending Practitioner	Last Date of Service	Client Name
Total: 1						
Client ID	Episode #	Admission Date	Admitting Practitioner	Attending Practitioner	Last Date of Service	Client Name
Total: 4						
Client ID	Episode #	Admission Date	Admitting Practitioner	Attending Practitioner	Last Date of Service	Client Name

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 the report

- A. This report displays clients opened to your team for less than 60 days.
- 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 Name	10			
815017	5/21/2014		2	5/21/2014
815020	4/22/2014		31	5/22/2014
722000	4/30/2014		23	5/14/2014
722070	4/28/2014		25	5/1/2014
731000	4/17/2014		36	5/8/2014
731000	5/6/2014		17	5/6/2014
811370	5/5/2014		18	5/15/2014
811380	4/29/2014		24	5/21/2014
811390	3/24/2014		60	5/19/2014
811390	5/22/2014		1	
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 System of Care			
ASOC Salinas Regional Team			13
ASOC, 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	Site: Adult Services Clinic	Service Code: 802	Duration: 120
1/27/2017	Site: Adult Services Clinic	Service Code: 807	Duration: 60
	Site: Adult Services Clinic	Service Code: 803	Duration: 120
1/31/2017	Site: Adult Services Clinic	Service Code: 802	Duration: 120
	Site: Adult Services Clinic	Service Code: 803	Duration: 300
2/3/2017	Site: Adult Services Clinic	Service Code: 803	Duration: 120
2/6/2017	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
How to read
the
report

Important
Tips

This report shows the MORS completed by your staff

- A. This report displays client history of MORS entries
 - B. There is also a field with "Days since the last MORS"
- Use this report to make sure each client has a mors within the recommended time period
 - 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.

 MORS Scores By Team Team : ASOC, CSOC TEAM	
Staff Member	80
111111 LastName,FirstName	
12/02/2010	6 Coping/Rehabilitating
03/24/2011	6 Coping/Rehabilitating
04/29/2011	6 Coping/Rehabilitating
10/21/2013	5 Poorly Coping/Engaged
	Days Since Last MORS 214.00
111111 LastName,FirstName	
09/02/2010	5 Poorly Coping/Engaged
12/28/2010	5 Poorly Coping/Engaged
01/11/2011	5 Poorly Coping/Engaged
02/08/2011	4 Poorly Coping/Not Engaged
03/08/2011	5 Poorly Coping/Engaged
04/05/2011	6 Coping/Rehabilitating
05/17/2011	6 Coping/Rehabilitating
07/19/2011	6 Coping/Rehabilitating
09/20/2011	6 Coping/Rehabilitating
12/20/2011	6 Coping/Rehabilitating
04/24/2012	4 Poorly Coping/Not Engaged
05/22/2012	4 Poorly Coping/Not Engaged
09/18/2012	5 Poorly Coping/Engaged
09/19/2013	6 Coping/Rehabilitating
	Days Since Last MORS 246.00
111111 LastName,FirstName	
08/31/2011	5 Poorly Coping/Engaged
07/05/2012	5 Poorly Coping/Engaged
07/03/2013	6 Coping/Rehabilitating
04/25/2014	6 Coping/Rehabilitating
	Days Since Last MORS 28.00
111111 LastName,FirstName	
04/15/2013	5 Poorly Coping/Engaged
12/16/2013	5 Poorly Coping/Engaged
	Days Since Last MORS 158.00
111111 LastName,FirstName	
05/13/2011	6 Coping/Rehabilitating
05/10/2012	6 Coping/Rehabilitating
05/23/2013	6 Coping/Rehabilitating
06/01/2014	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 the report

A. For each client ID it show the list of guarantors, admission date, and coverage start date



Monterey County Behavioral Health Financial Eligibility By Program

Program Name	Current Open Clients	101
	Count of Medi-Cal Clients	69
	Count of Drug Medi-Cal Clients	0
	Count of Medicare Palmetto GBA	6

Client ID	Name: Client Name	Admit Staff: Staff Name	Admit Date
Guarantor Order	Number Name:		Coverage Start Date
Guarantor Order 1	Number 10 Name: MEDICAL		Coverage Start Date 2/27/2014
Guarantor Order 1	Number 2 Name: MEDICARE PALMETTO GBA		Coverage Start Date 7/23/2008
Guarantor Order 2	Number 10 Name: MEDICAL		Coverage Start Date 7/1/2009
Guarantor Order 3	Number 3 Name: UMDAP		Coverage Start Date 7/1/2009
Guarantor Order 4	Number 1 Name: MONTEREY BHD SD		Coverage Start Date 7/1/2009
Guarantor Order 1	Number 10 Name: MEDICAL		Coverage Start Date 1/31/2014
Guarantor Order	Number Name:		Coverage Start Date
Guarantor Order	Number Name:		Coverage Start Date
Guarantor Order	Number Name:		Coverage Start Date
Guarantor Order 1	Number 10 Name: MEDICAL		Coverage Start Date 1/30/2014
Guarantor Order 2	Number 3 Name: UMDAP		Coverage Start Date 1/30/2014
Guarantor Order 3	Number 1 Name: MONTEREY BHD SD		Coverage Start Date 1/30/2014
Guarantor Order 1	Number 10 Name: MEDICAL		Coverage Start Date 1/16/2014
Guarantor Order 2	Number 3 Name: UMDAP		Coverage Start Date 1/16/2014
Guarantor Order 3	Number 1 Name: MONTEREY BHD SD		Coverage Start Date 1/16/2014
Guarantor Order 1	Number 10 Name: MEDICAL		Coverage Start Date 2/13/2014
Guarantor Order 2	Number 3 Name: UMDAP		Coverage Start Date 2/13/2014
Guarantor Order 3	Number 1 Name: MONTEREY BHD SD		Coverage Start Date 2/13/2014

820 Current Compliance Alerts by Team

Description

This report displays current compliance alerts on clients assigned to your staff members. This report can be used to view clients that need further action in order to be compliant.

How to read the report

- A. The problem section describes the issue
- B. Emails 1-3 displays the dates the staff member 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 Tips

- By double clicking on the staff member name you can isolate that staff members list
- To go back to the original screen click on the preview tab

Current Compliance Alerts By Team
Team: ASOC, CSOC Team

Staff Name: PATID							
PATID	Last,First						
Problem	Email-1	Email-2	Email-3	QI Action	Clinician Action	Resolved	Date Resolved
FINAL TREATMENT PLAN REQUIRED, Plan Status is Draft: 10/1/2013 to 9/30/2014 (episode 7)	11/25/13	1/24/14		Emailed clinician and posted client alert	Finalize current treatment plan	No	
Staff Name: [Redacted]							
Problem	Email-1	Email-2	Email-3	QI Action	Clinician Action	Resolved	Date Resolved
OVERDUE TREATMENT PLAN - Plan Dates Should Be 11/11/2013 to 10/31/2014 (episode 6)	11/12/13	12/9/13			Generate and finalize a current treatment plan	No	
OVERDUE TREATMENT PLAN - Plan Date Should Be 9/1/2013 to 8/31/2014				Emailed clinician and posted client alert	Generate and finalize a current treatment plan	No	
OVERDUE TREATMENT PLAN - Plan Date Should Be 10/1/2013 to 10/29/13				Emailed clinician and posted client alert	Generate and finalize a current treatment plan	No	
Staff Name: [Redacted]							
Problem	Email-1	Email-2	Email-3	QI Action	Clinician Action	Resolved	Date Resolved
FINAL TREATMENT PLAN REQUIRED, Plan Status is Draft: 10/1/2013 to 9/30/2014 (episode 7)	11/25/13	1/24/14		Emailed clinician and posted client alert	Finalize current treatment plan	No	
OVERDUE NEW TREATMENT PLAN - Plan Date Should Be 3/1/2014 to 2/28/2015 (episode 9)	4/11/14	5/14/14		Emailed clinician and posted client alert	Generate and finalize a current treatment plan	No	
Staff Name: [Redacted]							
Problem	Email-1	Email-2	Email-3	QI Action	Clinician Action	Resolved	Date Resolved
FINAL TREATMENT PLAN REQUIRED, Plan Status is Draft: 10/1/2013 to 9/30/2014 (episode 7)	11/25/13	1/24/14		Emailed clinician and posted client alert	Finalize current treatment plan	No	

Page 1 of 2
Confidential Patient Information See California Welfare and Institutions Code Section 5328 Print Date: 5/28/2014

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 the report Important Tips

- A. Double check you selected the correct program
- B. View service codes available to bill under this program
- If you notice a service code missing. Please contact QI at our helpline 831-755-4545



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

Program Name **Program Code**

Address: 951 Blanco Circle Salinas, CA 93901-4451

201	Intensive Care Coordination
208	Intensive Care Coordination KA
221	Intensive Homebased Service
228	Intensive Homebased Service KA
271	Psychotherapy for Crisis
301	Linkage/Brokerage
311	Collateral
330	Non Billable Activity
331	Assessment and Evaluation
341	Individual Counseling
351	MH Group Rehab Counseling
356	Family Group Counseling
357	Family Therapy
358	Collateral Group Counseling
361	Medication Support
363	MH Medication Support Telephone
365	Medication Support Conference
381	Mental Health Rehab
391	Plan Development
401	No MN Case Management
405	Case Management in Locked Facility
411	No MN Collateral
431	No MN Assessment
441	No MN Individual Therapy
451	No MN Group
475	Collateral in Locked Facility
481	No MN Mental Health Rehab
485	Mental Health in Locked Facility
491	No MN Plan Development
561	Electronic Prescribing
701	Client Cancel
702	Client Re-Schedule
703	Client No-Show
704	Staff Cancel
705	Staff Re-Schedule
801	Staff Meeting
802	UR/QI Review
803	Vacation/Sick
805	Indirect Service
806	Training
807	Supervision

823 Service Detail by program

Description

This report displays billing details for each client in the program selected.

How to read the report

- 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.
- B. Next to the patient ID you will see a total count of services for that patient ID and total duration in minutes



Monterey County Behavioral Health Service Detail by Program and Client

Program Name	Count of Services	# of clients	total minutes
PATID	count of services	20	3,015
service code 301	Duration 30 date_of_service 1/13/2014		Duration total 115
service code 330	Duration 3 date_of_service 1/6/2014		Provider
service code 391	Duration 82 date_of_service 1/13/2014		Provider
	count of services	2	Duration total 118
service code 330	Duration 3 date_of_service 1/6/2014		Provider
service code 391	Duration 115 date_of_service 1/13/2014		Provider
	count of services	1	Duration total 5
service code 330	Duration 5 date_of_service 1/7/2014		Provider
	count of services	3	Duration total 259
service code 301	Duration 28 date_of_service 1/29/2014		Provider
service code 331	Duration 111 date_of_service 1/16/2014		Provider
service code 331	Duration 120 date_of_service 1/16/2014		Provider
	count of services	3	Duration total 97
service code 330	Duration 2 date_of_service 1/2/2014		Provider
service code 330	Duration 4 date_of_service 1/13/2014		Provider
service code 381	Duration 91 date_of_service 1/22/2014		Provider
	count of services	3	Duration total 180
service code 341	Duration 60 date_of_service 1/2/2014		Provider
service code 341	Duration 92 date_of_service 1/3/2014		Provider
service code 381	Duration 28 date_of_service 1/2/2014		Provider
	count of services	4	Duration total 305
service code 301	Duration 99 date_of_service 1/13/2014		Provider
service code 361	Duration 45 date_of_service 1/13/2014		Provider
service code 381	Duration 90 date_of_service 1/13/2014		Provider
service code 381	Duration 71 date_of_service 1/27/2014		Provider
	count of services	1	Duration total 4
service code 330	Duration 4 date_of_service 1/14/2014		Provider
	count of services	1	Duration total 94
service code 391	Duration 94 date_of_service 1/21/2014		Provider
	count of services	1	Duration total 23
service code 301	Duration 23 date_of_service 1/14/2014		Provider
	count of services	2	Duration total 150
service code 301	Duration 36 date_of_service 1/27/2014		Provider
service code 391	Duration 114 date_of_service 1/23/2014		Provider
	count of services	3	Duration total 154
service code 301	Duration 29 date_of_service 1/27/2014		Provider
service code 301	Duration 9 date_of_service 1/29/2014		Provider
service code 391	Duration 116 date_of_service 1/23/2014		Provider

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 the report

- A. You can view any notes entered in the waitlist and referral form by clicking on the on demand 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				3/16/2018		Click here to view notes
3/9/2018	No				3/9/2018		Click here to view notes
Referral Accepted							
1/29/2018	Yes				1/29/2018	Yes	Click here to view notes
3/12/2018	No				3/12/2018	Yes	Click here to view notes
3/7/2018					3/7/2018	Yes	Click here to view notes

825 Waitlist and Referral History by Program

Description

This report displays all the clients referred that have been assigned.

How to read the report

- A. This report displays the following:
- a. Referral date
 - 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	Family #	Age	Language	Staff Referring	Program Name	Review Date	Referral Accepted	Clinician Assigned
3/24/2015	Yes	[REDACTED]	[REDACTED]	803a	39	English	MCDUGALL, KELLI	CS FAST Dependency Unit	3/24/2015	Yes	ELIS, RACHEL
Other referring party:											
Notes:											
Date Assigned/Denied: 4/16/2015											
Disposition Notes: Client assigned by N. Smith.											
9/20/2017	Yes	[REDACTED]	[REDACTED]		45	English	LAFRENIERE, KRISTN	CS FAST Dependency Unit	9/20/2017	Yes	DAVIS, VANESA C
Other referring party:											
Notes:											
Date Assigned/Denied: 10/9/2017											
Disposition Notes: Client assigned by N. Smith.											
7/22/2016	Yes	[REDACTED]	[REDACTED]		50	English	GIFFORD, LEAH A	CS FAST Dependency Unit	7/22/2016	Yes	BRISTOW, ALEXANDRA
Other referring party:											
Notes:											
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 the report

- A. This report displays the following:
- a. Referral date
 - 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 828 Waitlist and Referral Detailed- Not Assigned

Referral Date	Priority	PATID	Patient Name	Family #	Age	Language	Staff Referring	Program Name	Review Date	Referral Accepted	Clinician Assigned
1/29/2018	Yes				12	English	BECK, MICHAEL	CS FAST Dependency Unit	1/29/2018	Yes	
Other referring party:											
Notes: ENGLISH											
[Redacted Notes]											
3/10/2018	Yes			1190	15	English	VASQUEZ, VERONICA	CS FAST Dependency Unit	3/10/2018		
Other referring party:											
Notes: [Redacted Notes]											
3/9/2018	No				35	English	WRIGHT, NATHAN	CS FAST Dependency Unit	3/9/2018		
Other referring party:											
Notes: [Redacted Notes]											
3/12/2018	No			1178	11	English	DENTON, JENNIFER	CS FAST Dependency Unit	3/12/2018	Yes	
Other referring party:											
Notes: [Redacted Notes]											

829 Client contact sheet

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



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

Client Information

Case Coordinator - RICO RAMIREZ, MOISE
Admitting Practitioner - RICO RAMIREZ, MOISE
 Home Ph: [REDACTED]
 Address: 1 [REDACTED] Salinas 93 [REDACTED]
 Relationship Type: Mother
 Last Name or Agency Name: [REDACTED]
 First Name: [REDACTED]
 Home Phone: [REDACTED]
 Cell Phone: [REDACTED]
 Address: [REDACTED]
 Release of Information: Yes (Full)
 Release Start Date: 9/14/2016

Client Information

Case Coordinator - JOHNSON, MARION J
Admitting Practitioner - JOHNSON, MARION J
 Home Ph: [REDACTED] Work Ph: [REDACTED]
 Address: [REDACTED] Salinas 9 [REDACTED]
 Relationship Type: Case Manager
 Last Name or Agency Name: [REDACTED]
 First Name: [REDACTED]
 Address: CA
 Relationship Type: [REDACTED]
 Last Name or Agency Name: [REDACTED]
 First Name: SA [REDACTED]
 Home Phone: [REDACTED]
 Address: 606 S [REDACTED]
 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

Client Information

Case Coordinator - EDEZA, HILDA
Admitting Practitioner - EDEZA, HILDA
 Home Ph: [REDACTED]
 Address: [REDACTED] Salinas 9 [REDACTED]
 Relationship Type: Mother
 Last Name or Agency Name: [REDACTED]
 First Name: [REDACTED]
 Home Phone: [REDACTED]
 Cell Phone: [REDACTED]
 Address: Salinas CA
 Release of Information: No

830 Medi Cal Eligibility Check

Description

This report displays clients MEDS eligibility by program

How to read the report

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

PATID	SSN	Name	DOB	Address	City	State	Zip Code	Episode	Last Service
Program Name									
PATID	Social #	Patient Name	Date of Birth	Street Address	Salinas	California	99901	8	6/4/2014
Meds Elig Data >>>	Meds SS#	CIN: 123456789A	Aid Code: 6E	Status Code: 999				Other Cov:	File Date: 6/1/2014
PATID	Social #	Patient Name	Date of Birth	Street Address	Salinas	California	93906	10	6/12/2014
Meds Elig Data >>>	Meds SS#	CIN: 123456789B	Aid Code: 67	Status Code: 501	691			Other Cov: D	File Date: 12/1/2012
Program Name									
PATID	Social #	Patient Name	Date of Birth	Street Address		California	93930	2	6/12/2014
Meds Elig Data >>>	Meds SS#	CIN: 123456789C	Aid Code:	Status Code: 999				Other Cov:	File Date: 6/1/2014
Program Name									
PATID	Social #	Patient Name	Date of Birth	Street Address	Greenfield	California	93927	4	6/9/2014
Meds Elig Data >>>	Meds SS#	CIN: 123456789D	Aid Code: 67	Status Code: 501	691			Other Cov: N	File Date: 6/1/2014
PATID	Social #	Patient Name	Date of Birth	Street Address	King City	California	93930	16	5/15/2014
Meds Elig Data >>>	Meds SS#	CIN: 123456789E	Aid Code: 60	Status Code: 999				Other Cov:	File Date: 10/1/2013
PATID	Social #	Patient Name	Date of Birth	Street Address	King City	California	93930	52	5/22/2014
Meds Elig Data >>>	Meds SS#	CIN: 123456789F	Aid Code: 82	Status Code: 301				Other Cov: N	File Date: 6/1/2014
PATID	Social #	Patient Name	Date of Birth	Street Address	King City	California	93930	7	5/27/2014
Meds Elig Data >>>	Meds SS#	CIN: 123456789G	Aid Code:	Status Code: 999				Other Cov:	File Date: 1/1/2014
Program Name									
PATID	Social #	Patient Name	Date of Birth	Street Address	Gonzales	California	93926	5	6/5/2014
Meds Elig Data >>>	Meds SS#	CIN: 123456789H	Aid Code: 03	Status Code: 999	03			Other Cov: D	File Date: 6/1/2014
PATID	Social #	Patient Name	Date of Birth	Street Address	Marina	California	93933	1	5/1/2014
Meds Elig Data >>>	Meds SS#	CIN: 123456789I	Aid Code: 60	Status Code: 999				Other Cov:	File Date: 10/1/2013
PATID	Social #	Patient Name	Date of Birth	Street Address	Marina	California	93933	3	6/4/2014
Meds Elig Data >>>	Meds SS#	CIN: 123456789J	Aid Code:	Status Code: 999				Other Cov:	File Date: 2/1/2014
PATID	Social #	Patient Name	Date of Birth	Street Address	Salinas	California	93906	2	6/6/2014
Meds Elig Data >>>	Meds SS#	CIN: 123456789K	Aid Code:	Status Code: 999				Other Cov:	File Date: 2/1/2014
PATID	Social #	Patient Name	Date of Birth	Street Address	Marina	California	93933	3	5/22/2014

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	<p>A. This report is organized by program staff member and service code.</p> <p>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)</p>
Important Tips	<ul style="list-style-type: none"> - 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



Monterey County Behavioral Health
831 Program/Staff Services Information

Program Name [Redacted]

Staff: [Redacted]
Staff ID# [Redacted] Report Date Range [Redacted]

Service Code	Plan Development	Total Minutes Billed	Average Per Session
Service Code: 391	Plan Development	154	51

Staff: [Redacted]
Staff ID# [Redacted] Report Date Range [Redacted]

Service Code	Linkage/Brokerage	Total Minutes Billed	Average Per Session
Service Code: 301	Linkage/Brokerage	549	23
Service Code: 311	Collateral	35	35
Service Code: 330	Non Billable A ctivity	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: [Redacted]
Staff ID# [Redacted] Report Date Range [Redacted]

Service Code	Linkage/Brokerage	Total Minutes Billed	Average Per Session
Service Code: 301	Linkage/Brokerage	10	10

Staff: [Redacted]
Staff ID# [Redacted] Report Date Range [Redacted]

Service Code	Linkage/Brokerage	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: [Redacted]
Staff ID# [Redacted] Report Date Range [Redacted]

Service Code	Linkage/Brokerage	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	Linkage/Brokerage	Total Minutes Billed	Average Per Session
Service Code: 301	Linkage/Brokerage	549	23
Client ID # [Redacted]	Choice service	01/02/2014	minutes 13 Age: 56
Client ID # [Redacted]	Choice service	01/07/2014	minutes 14 Age: 54
Client ID # [Redacted]	Choice service	01/16/2014	minutes 68 Age: 29
Client ID # [Redacted]	Choice service	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 style="list-style-type: none"> A. Grouped by System Code B. Displays Staff Name, User ID & Staff Title. C. Displays the number of staff assigned to that System code.
Important Tips	<ul style="list-style-type: none"> - 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.



Monterey County Behavioral Health 833 User Access Details

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

ASPIRANET			Staff Count 8
Staff Name	User ID	Title	
[Name]	[User ID]	LCSW	
[Name]	[User ID]	AMFT (Associate MFT)	
[Name]	[User ID]	AMFT (Associate MFT)	
[Name]	[User ID]	BHA (Behavioral Health Aide)	
[Name]	[User ID]	MHS (Mental Health Specialist)	

CHS			Staff Count 24
Staff Name	User ID	Title	
[Name]	[User ID]	LCSW	
[Name]	[User ID]	MFT Trainee	
[Name]	[User ID]	MSW Intern	
[Name]	[User ID]	Admin- Billing	
[Name]	[User ID]	LCSW	
[Name]	[User ID]	Admin- Billing	
[Name]	[User ID]	ASW (Associate Social Worker)	
[Name]	[User ID]	APCC (Associate PCC)	
[Name]	[User ID]	Admin- Billing	
[Name]	[User ID]	AMFT (Associate MFT)	
[Name]	[User ID]	Admin- Billing	
[Name]	[User ID]	CATC (Registered)	
[Name]	[User ID]	AMFT (Associate MFT)	
[Name]	[User ID]	Admin- Billing	
[Name]	[User ID]	MSW Intern	
[Name]	[User ID]	RAS	
[Name]	[User ID]	Psychologist (Licensed)	
[Name]	[User ID]	AMFT (Associate MFT)	
[Name]	[User ID]	Admin- Billing	
[Name]	[User ID]	RAS (Registered)	
[Name]	[User ID]	MSW Intern	
[Name]	[User ID]	AMFT (Associate MFT)	
[Name]	[User ID]	MHRS or equivalent	
[Name]	[User ID]	Admin- Billing	

CROSSROADS			Staff Count 1
Staff Name	User ID	Title	
[Name]	TENORIOBM		

834Productivity (by billing code+ Program)

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 read the report

- D. This report is sorted by programs the selected staff member has billed for the selected time frame
- 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.
- F. Displays total minutes billed for the selected time frame and a total of hours and 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

- This will help you to evaluate the amount of billable time your staff has on a monthly basis
- 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



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

Staff: **001111-123456789** Report Date Range: 2/1/2014 to 3/1/2014
Staff ID# **001111**

		Total Minutes Billed	Average Per Session
CS MHSa TIP AVANZA FSP			
<i>Service Code:</i> 330	Non Billable Activity	110	110
<i>Service Code:</i> 351	MH Group Rehab Counseling	1,038	69
<i>Service Code:</i> 381	Mental Health Rehab	143	143
CS MHSa TIP Avanza SYSDEV			
<i>Service Code:</i> 301	Linkage/Brokerage	90	45
<i>Service Code:</i> 330	Non Billable Activity	20	20
<i>Service Code:</i> 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 the report

- This report is organized by program. Multiple programs can be selected prior to running the report.
- On the left side of the report you will see the above counts by month
- 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

Program Name 1

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

Program Name 2

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

Clients Served
 Count of Services
 Service Minutes
 Grand Totals

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 the report	A. Once you have filled out the End of Employment form in Avatar you can print this 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	A.

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 emphasizing symptoms and impairments as well as including aspects of client mental health history.

Findings:

Staff Name: [REDACTED]		Supervisor/Manager: [REDACTED]			
Date of Request	PATID	QI Staff Name	Date of Service	Problem Code	Staff ID:
4/13/2015	multiple	Lucero Robles		Progress Note	[REDACTED]

CAR Details

CAR Unique ID: [REDACTED] **Service Code:** [REDACTED] **Episode Number:** [REDACTED] **Date of Follow up:** 4/13/2015

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 necessity 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:** [REDACTED] **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

- 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.
- 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 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 between 0-25	Unassigned Clients	Unassigned clients 0-25
Behavioral Health Services	10	6	7	4
Community Treatment Program	78	28	0	0
Community Treatment Program - 06	24	14	8	6
Community Treatment Program - 07	13	7	9	6
Community Treatment Program - 08	1	0	1	0
Community Treatment Program - 09	6	0	6	0
Community Treatment Program - 10	30	0	30	0
Community Treatment Program - 11	3	3	0	0
Community Treatment Program - 12	7	1	2	0
Community Treatment Program - 13	20	16	0	0
Community Treatment Program - 14	14	14	0	0
Community Treatment Program - 15	9	9	9	9
Community Treatment Program - 16	5	5	5	5
Community Treatment Program - 17	6	6	4	4
Community Treatment Program - 18	21	21	1	1
Total	247	130	82	35

Page 2 (Details)

PATID	Referral Date	Date Assigned	Length of wait days	Age	Date client waitlisted
000000	02/04/14		132	2.7	
000000	02/04/14		132	19.4	
000000	02/05/14		131	54.9	
000000	02/05/14		131	14.3	
000000	02/10/14		126	25.3	
000000	02/11/14		125	74.2	
000000	02/11/14		125	46.0	
000000	02/12/14		124	13.6	
000000	02/13/14		123	74.2	
000000	02/13/14		123	12.3	
000000	02/16/14		120	17.9	

842 Waitlist Analysis Report Current

Description
How to read
the
report

This report displays clients waiting assignment

- A. At the top of the report you will see number of clients pending to be assigned.
- 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 clients pending assignment
Of those clients a total of 212 are between the ages of 0 and 25.

	Clients placed on waitlist	Clients between 0-25
	62	28
	1	0
	1	0
	29	12
	38	26
	1	1
	40	21
	1	1
	1	0
	1	0
	14	0
	53	0
	1	1
	6	6
	33	6
	22	14
	8	8
	28	28
	9	9
	16	16
	1	1
	1	1
	29	29
	1	1
	2	0
	1	0
	1	0
	3	2
	1	1
Total	405	212

Page 2 (Details)

PATID	Referral Date	Date Assigned	Length of wait days	Age	Date client waitlisted
	09/30/11		990	13.3	
	10/03/11		987	20.9	
	10/11/11		979	20.7	
	10/27/11		963	21.9	
	10/28/11		962	18.3	
	11/07/11		952	15.0	
	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

- A. The gray heading displays the program selected. If multiple programs were selected you will see two gray headings in different pages.
- B. The blue heading is the zip code those clients are assigned to (this zip codes comes from the address entered into the admission form)

Important Tips

- 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.



Monterey County Behavioral Health
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
93426					
			No Entry	05/05/2014	06/23/2014
<i>Primary Diagnosis: ANXIETY DISORDER NOS</i>					
93926					
				01/16/2013	06/26/2014
<i>Primary Diagnosis: BIPOLAR I DISORDER MOST RECENT EPISODE MIXED SEVER</i>					
93927					
			No Entry	05/05/2014	06/26/2014
<i>Primary Diagnosis: ATTENTION-DEFICIT/HYPERACTIVITY DISORDER NOS</i>					
				03/20/2013	
<i>Primary Diagnosis: *SCHIZOPHRENIA, SCHIZOAFFECTIVE TYPE, SUB CHRONIC</i>					
				10/07/2013	06/25/2014
<i>Primary Diagnosis: PSYCHOTIC DISORDER NOS</i>					
			GUIROY,DON	02/29/2012	06/18/2014
<i>Primary Diagnosis: BIPOLAR II DISORDER</i>					
				04/03/2014	07/01/2014
<i>Primary Diagnosis:</i>					
				07/11/2012	07/03/2014
<i>Primary Diagnosis: *SCHIZOPHRENIA, SCHIZOAFFECTIVE TYPE, SUB CHRONIC</i>					
				03/21/2012	
<i>Primary Diagnosis: BIPOLAR II DISORDER</i>					

Date Printed: 6/16/2014
Confidential client information, see California Welfare & Institutions code section 5328
Page 1 of 4

844 Current Team List

Description	This report displays the current team assignment for the selected team
How to read the report	<p>A. The name highlighted in blue is the assigned supervisor for the team.</p> <p>B. The staff names that follow are the staff members assigned to this team. This also includes the start date of when the staff member became part of this team and their title.</p>
Important Tips	<ul style="list-style-type: none"> - Be sure to notify QI of any changes such as title changes, team transfers, end of employment etc..



Monterey County Behavioral Health 844 Current Team List

Staff ID and Name	Start Date	End Date
Monterey County BH		
Children System of Care		
CSOC Education Team	22	
(Supervisor) (Supervisor) (Supervisor)		
	Supervisor	
(Supervisor) (Supervisor) (Supervisor)	LMFT	6/1/2017
(Supervisor) (Supervisor) (Supervisor)	MFTI	6/1/2017
(Supervisor) (Supervisor) (Supervisor)	LCSW	6/1/2017
(Supervisor) (Supervisor) (Supervisor)	MHRS or equivalent	6/1/2017
(Supervisor) (Supervisor) (Supervisor)	LCSW	6/1/2017
(Supervisor) (Supervisor) (Supervisor)	MFT (Marriage and Family T	6/1/2017
(Supervisor) (Supervisor) (Supervisor)	MFT (Marriage and Family T	6/1/2017
(Supervisor) (Supervisor) (Supervisor)	MFTI	6/1/2017
(Supervisor) (Supervisor) (Supervisor)	MFTI	6/1/2017
(Supervisor) (Supervisor) (Supervisor)	MFTI	8/1/2017
(Supervisor) (Supervisor) (Supervisor)	ASW (Associate Social Work	6/1/2017
(Supervisor) (Supervisor) (Supervisor)	ASW (Associate Social Work	6/1/2017
(Supervisor) (Supervisor) (Supervisor)	ASW (Associate Social Work	6/1/2017
(Supervisor) (Supervisor) (Supervisor)	MFTI	6/1/2017
(Supervisor) (Supervisor) (Supervisor)	ASW (Associate Social Work	6/1/2017
(Supervisor) (Supervisor) (Supervisor)	MFT (Marriage and Family T	6/1/2017
(Supervisor) (Supervisor) (Supervisor)	ASW (Associate Social Work	6/1/2017
(Supervisor) (Supervisor) (Supervisor)	MFTI	6/1/2017
(Supervisor) (Supervisor) (Supervisor)	MSW Intern	8/1/2017
(Supervisor) (Supervisor) (Supervisor)	MSW Intern	8/1/2017
(Supervisor) (Supervisor) (Supervisor)	MSW Intern	8/1/2017
(Supervisor) (Supervisor) (Supervisor)	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 style="list-style-type: none"> A. The program name is highlighted in blue with a distinct count of clients for that program B. The region name is highlighted in yellow with a distinct count of clients for that region with in that program
Important Tips	<ul style="list-style-type: none"> - On the last page of the report you will find a bar graph of count of clients by region



Monterey County Behavioral Health 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
Access AB109			86		
Coastal Region			23		
8	client ID Lastname,First	06/26/17	GODINEZ,JACKIE		
	Primary Diagnosis: Diagnosis deferred				
	client ID Lastname,First	08/30/17	WENDEL RICE,SABRINA		
	Primary Diagnosis: Diagnosis deferred				
	client ID Lastname,First	04/06/17	GONZALEZ,RAYMOND		
	Primary Diagnosis: Methamphetamine use disorder, severe, dependence				
	client ID Lastname,First	09/25/17	ALLRED,JEREMY A	SIRKIN,DAVID W	
	Primary Diagnosis: Substance-induced psychotic disorder with hallucinations				
	client ID Lastname,First	12/22/15	GODINEZ,JACKIE	STEWART,STEPHANIE M	
	Primary Diagnosis: Mood disorder NOS				
	client ID Lastname,First	06/07/17	GODINEZ,JACKIE		
	Primary Diagnosis: Diagnosis deferred				
	client ID Lastname,First	08/30/17	GODINEZ,JACKIE		
	Primary Diagnosis:				
	client ID Lastname,First	10/03/17	ALLRED,JEREMY A	SIRKIN,DAVID W	
	Primary Diagnosis: No diagnosis or condition on Axis I				
	client ID Lastname,First	08/23/17	WENDEL RICE,SABRINA		
	Primary Diagnosis:				
	client ID Lastname,First	07/14/17	WENDEL RICE,SABRINA	SIRKIN,DAVID W	
	Primary Diagnosis: Anxiety, generalized				
	client ID Lastname,First	08/31/17	GONZALEZ,RAYMOND		
	Primary Diagnosis: Observation, suspected mental disorder				
	client ID Lastname,First	09/25/17	WENDEL RICE,SABRINA		
	Primary Diagnosis: Diagnosis deferred				
	client ID Lastname,First	07/26/17	WENDEL RICE,SABRINA		
	Primary Diagnosis: Diagnosis deferred				
	client ID Lastname,First	11/03/16	ALLRED,JEREMY A	SIRKIN,DAVID W	
	Primary Diagnosis: Amphetamine abuse				
	client ID Lastname,First	06/20/17	WENDEL RICE,SABRINA		
	Primary Diagnosis: Diagnosis deferred				
	client ID Lastname,First	06/30/17	GODINEZ,JACKIE		
	Primary Diagnosis: Diagnosis deferred				
	client ID Lastname,First	03/30/17	GONZALEZ,RAYMOND		
	Primary Diagnosis: Major depressive disorder, single episode, unspecified				
	client ID Lastname,First	05/11/17	ALLRED,JEREMY A	SIRKIN,DAVID W	10/13/17
	Primary Diagnosis: Major depressive disorder				
	client ID Lastname,First	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 the report

- A. Number of Clients served displays the number of clients served during the 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 **Bold** row displays totals for the team



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

Team Name		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
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
	ASW	32	70	2,551	\$ 8,117	47	49	0	1
	ASW	7	10	860	\$ 317	52	53	0	0
Totals		55	111	5,071	\$ 16,188	125	128	0	2

1
10/12/2017

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 report	<p>A. Access date is the date the staff member accessed the client record</p> <p>B. Access time is the time the staff member accessed the client record</p> <p>C. Access reason is the information entered by the staff when asked by Avatar what is the reason they are accessing this client</p>
Important Tips	<ul style="list-style-type: none"> - Use this report when is suspected or reported that a staff member has been accessing a client chart that should not have been accessed - Be sure to notify QI of these reports as well



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

PATID	Access Time	Access Reason
Access Date: 2/28/2017		
[Redacted]	03:31 PM	new client t tis clinician's caseload
[Redacted]	03:45 PM	new access client this clinician's caseload.
Access Date: 1/31/2017		
[Redacted]	05:27 PM	this therapist is new client's assigned therapist
[Redacted]	05:28 PM	this clinician has been assigned to new access client
Access Date: 1/26/2017		
[Redacted]	01:25 PM	new client to th thrapists caseload
[Redacted]	01:33 PM	nw cliient to this writers caseload
Access Date: 1/17/2017		
[Redacted]	09:33 AM	new client to my caseload
[Redacted]	09:34 AM	new client to my caseload
Access Date: 1/16/2017		
[Redacted]	11:54 AM	This writer has been newly assigned to this parent client.
[Redacted]	11:56 AM	new client to this writers caseload
[Redacted]	11:56 AM	new client to this writers caseload.
[Redacted]	12:01 PM	New client to this writer's caseload
[Redacted]	12:49 PM	new collateral client
[Redacted]	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 the report Important Tips

- A. Look for the “data missing” red text in the columns. This tells you the client does not have any CSI data entered for this program
- Keep an eye out for staff members selecting “unknown” for most of the questions



857 Missing CSI Data by Program

This report shows all of the episode openings that need CSI data by program.
Data shown below in red is required, if missing please go to CWS->Clinician Menu -> CSI data - then complete fields

PROGRAM NAME										
Client ID #	Episode #	Program	First Name	last name	Mother's Name	school	Legal	Fiscally Responsible County	Special Population	Ethnicity
Staff name										
18	Access AB109					No School Info	Voluntary	Monterey	No special population serv	Not Hispanic or Latino
14	Access AB109					No School Info	Voluntary	Monterey	No special population serv	Hispanic or Latino
1	Access AB109					No School Info	Voluntary	Monterey	No special population serv	Hispanic or Latino
3	Access AB109					No School Info	Voluntary	Monterey	No special population serv	Hispanic or Latino
3	Access AB109					No School Info	Unknown/!	Monterey	No special population serv	Hispanic or Latino
10	Access AB109					No School Info	Voluntary	Monterey	No special population serv	Not Hispanic or Latino
1	Access AB109					No School Info	Voluntary	Monterey	No special population serv	Hispanic or Latino
8	Access AB109					No School Info	Voluntary	Monterey	No special population serv	Not Hispanic or Latino
1	Access AB109					No School Info	Voluntary	Monterey	No special population serv	Not Hispanic or Latino
5	Access AB109					No School Info	Voluntary	Monterey	No special population serv	Unknown / Not Reported
3	Access AB109					No School Info	Voluntary	Monterey	No special population serv	Not Hispanic or Latino
4	Access AB109					No School Info	Voluntary	Monterey	No special population serv	Not Hispanic or Latino
8	Access AB109					No School Info	Voluntary	Monterey	No special population serv	Not Hispanic or Latino
3	Access AB109					No School Info	Voluntary	Monterey	No special population serv	Unknown / Not Reported
3	Access AB109					No School Info	Voluntary	Monterey	No special population serv	Hispanic or Latino
9	Access AB109					No School Info	Voluntary	Monterey	No special population serv	Hispanic or Latino
4	Access AB109					No School Info	Voluntary	Monterey	No special population serv	Not Hispanic or Latino
4	Access AB109					No School Info	Voluntary	Monterey	No special population serv	Hispanic or Latino
Staff name										
26	Access AB109					No School Info	Voluntary	Monterey	No special population serv	Not Hispanic or Latino
8	Access AB109					No School Info	Voluntary	Monterey	No special population serv	Hispanic or Latino
4	Access AB109					No School Info	Voluntary	Monterey	No special population serv	Not Hispanic or Latino
5	Access AB109					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 missing	data missing	data missing	data missing
1	Access AB109					No School Info	Other invol	Monterey	No special population serv	Unknown / Not Reported
6	Access AB109					No School Info	Voluntary	Monterey	No special population serv	Hispanic or Latino

Print Date: 10/12/2017
MONTEREY COUNTY BEHAVIORAL HEALTH
CONFIDENTIAL CLIENT INFORMATION
Page Number: 1

858 Program Service Information by Service Type

Description	This report displays service summary information by service type
How to read the report	<ul style="list-style-type: none"> A. Count of clients displays count of clients served during the selected date range 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 Tips	<ul style="list-style-type: none"> - Overridden to non billable row displays services that have been switched to 330 due to charts being out of compliance - Disallowed row displays services disallowed by QI



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

SERVICE INFORMATION BY TYPE OF SERVICE

Program: Behavioral Health Bureau 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
Overridden 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/Evaluation	
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 Care	
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 the report

- A. This report can be used to identify clients who may need to be discharged or may 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 #	Program Name	Admission Date	Last DOS	Days w/o Service	Attending Practitioner	Admitting Practitioner	Program Name	# of Opened Episodes	Recent DOS	Days Since Last Service
000000	3	Rebekah Children's Services Wrap	02/09/15	04/14/16	546						546
000000	7	ZADP Genesis Residential Adult Drug Ct.	12/09/13	12/23/13	1,389						1,389
000000	6	ZADP Genesis Residential	12/20/13	05/28/14	1,233						1,233
000000	7	Rebekah Children's Services Wrap	03/17/14	05/01/14	1,260						1,260
000000	3	DTHMCSTART 6-11	03/15/16	05/04/17	161						161
000000	5	DTHMCSTART 6-11	03/13/17	05/24/17	141			CS MCSTART 0 to 8	2	10/6/17	6
000000	2	DTHMCSTART 6-11 DBES	06/18/15	08/08/17	65			CS Lincoln Elementary IEP	3	10/11/17	1
000000	5	AS Salinas Med Support	11/17/16	05/24/17	141						141
000000	2	AS Salinas Outpatient	08/29/05	08/04/17	69						69
000000	1	DTH Families First and Foremost AC	02/22/17	08/09/17	64						64
000000	1	CS Secure Families	06/15/17	07/25/17	79						79
000000	7	CS MHSA TIP Avenza SYSDEV	10/00/15	03/31/16	560						560
000000	11	CS FAST Dependency Unit	10/05/16	07/10/17	94			Rebekah Children's Services Wrap	2	8/30/17	43
000000	7	CS MHSA TIP Avenza SYSDEV	06/28/16	07/26/17	78						78

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 the report
Important Tips

- A. This report can be used to view a history of the clients admitted to a program for any given date range
- Note: this is not current open clients
- 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**

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

Monterey Behavioral Health							Total number of clients: 41
Client ID	Admission Date	Discharge Date	Client Name	Length of Stay (days)	Last Date of Service	Admitting Practitioner	Attending Practitioner
112001	4/6/2017		MONTEREY, CHRISTOPHER	189		DR. JENNIFER L. GIBSON	DR. JENNIFER L. GIBSON
112002	8/30/2017		MONTEREY, JACOB	43		DR. JENNIFER L. GIBSON	DR. JENNIFER L. GIBSON
112003	7/26/2017		MONTEREY, JACOB	78		DR. JENNIFER L. GIBSON	DR. JENNIFER L. GIBSON
112004	8/23/2017		MONTEREY, JACOB	50		DR. JENNIFER L. GIBSON	DR. JENNIFER L. GIBSON
112005	5/17/2017		MONTEREY, JACOB	148		DR. JENNIFER L. GIBSON	DR. JENNIFER L. GIBSON
112006	7/26/2017		MONTEREY, JACOB	78	7/26/2017	DR. JENNIFER L. GIBSON	DR. JENNIFER L. GIBSON
112007	4/24/2017		MONTEREY, JACOB	171		DR. JENNIFER L. GIBSON	DR. JENNIFER L. GIBSON
112008	1/30/2017		MONTEREY, JACOB	255		DR. JENNIFER L. GIBSON	DR. JENNIFER L. GIBSON
112009	8/2/2017		MONTEREY, JACOB	71	10/4/2017	DR. JENNIFER L. GIBSON	DR. JENNIFER L. GIBSON
112010	9/1/2017		MONTEREY, JACOB	41		DR. JENNIFER L. GIBSON	DR. JENNIFER L. GIBSON
112011	3/7/2017		MONTEREY, JACOB	219		DR. JENNIFER L. GIBSON	DR. JENNIFER L. GIBSON
112012	4/27/2017		MONTEREY, JACOB	168		DR. JENNIFER L. GIBSON	DR. JENNIFER L. GIBSON
112013	7/12/2017		MONTEREY, JACOB	92	10/10/2017	DR. JENNIFER L. GIBSON	DR. JENNIFER L. GIBSON
112014	2/15/2017		MONTEREY, JACOB	239		DR. JENNIFER L. GIBSON	DR. JENNIFER L. GIBSON
112015	3/8/2017		MONTEREY, JACOB	218		DR. JENNIFER L. GIBSON	DR. JENNIFER L. GIBSON
112016	2/8/2017		MONTEREY, JACOB	246		DR. JENNIFER L. GIBSON	DR. JENNIFER L. GIBSON
112017	3/16/2017		MONTEREY, JACOB	210	5/12/2017	DR. JENNIFER L. GIBSON	DR. JENNIFER L. GIBSON
112018	9/5/2017		MONTEREY, JACOB	37		DR. JENNIFER L. GIBSON	DR. JENNIFER L. GIBSON
112019	4/13/2017		MONTEREY, JACOB	182		DR. JENNIFER L. GIBSON	DR. JENNIFER L. GIBSON
112020	1/4/2017		MONTEREY, JACOB	281		DR. JENNIFER L. GIBSON	DR. JENNIFER L. GIBSON
112021	7/24/2017		MONTEREY, JACOB	80		DR. JENNIFER L. GIBSON	DR. JENNIFER L. GIBSON
112022	4/20/2017		MONTEREY, JACOB	175		DR. JENNIFER L. GIBSON	DR. JENNIFER L. GIBSON
112023	3/9/2017		MONTEREY, JACOB	217		DR. JENNIFER L. GIBSON	DR. JENNIFER L. GIBSON
112024	1/30/2017		MONTEREY, JACOB	255		DR. JENNIFER L. GIBSON	DR. JENNIFER L. GIBSON
112025	7/12/2017		MONTEREY, JACOB	92		DR. JENNIFER L. GIBSON	DR. JENNIFER L. GIBSON