

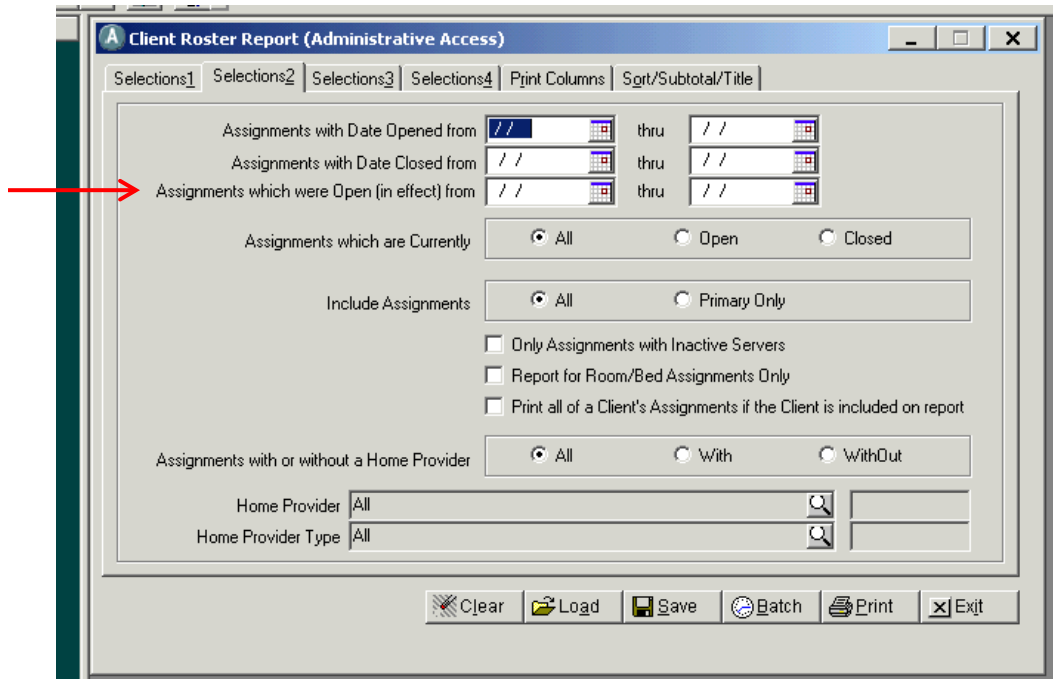
## Report Templates for Tracking Katie A Clients in Anasazi

### 1. Client Roster Report

- a. This template allows you to pull a roster of Katie A Subclass clients that are currently active in your program. This is useful for monthly reporting to San Diego County BHS, as reporting the total number of active Subclass clients to your COR is required for each program.
- b. **“Load” Template – Katie A Subclass Client Roster Report.**
  - i. Start by selecting the Kokopeli (or “Systems” button) in the top left of the Clinician’s Homepage.
  - ii. Select Menu → Client Data → Client Assignments → Client Assignment Reports → Client Roster Report.
  - iii. Select the “Load” button and select the report “Katie A Subclass Client Roster Report”.
- c. Selections 1:
  - i. Enter the “Unit(s)” for your program(s)

	Selections1	Selections2	Selections3	Selections4	Print Columns	Sort/Subtotal/Title
Clients	All					
Client Status	All					
Units	Administration					9999
SubUnits	All					
Program Category Headings	All					
Program Categories	All					
Unit Types	All					
Administrative Groups	All					
Assignment Types	All					
Assignment Servers	All					
Treatment Teams	All					
Treatment Team Leaders	All					
Absence Types	All					

- d. Selections 2:
  - i. Use the “Assignments which were Open (in effect) from” field. For the “Thru” date, entered today's date. There is no need to enter an initial date. This will pull all clients that are currently active in your program as of today's date.



- e. Sort/Subtotal/Title:
  - i. Click “Print”. Make sure “Screen” is selected, and click “OK”.

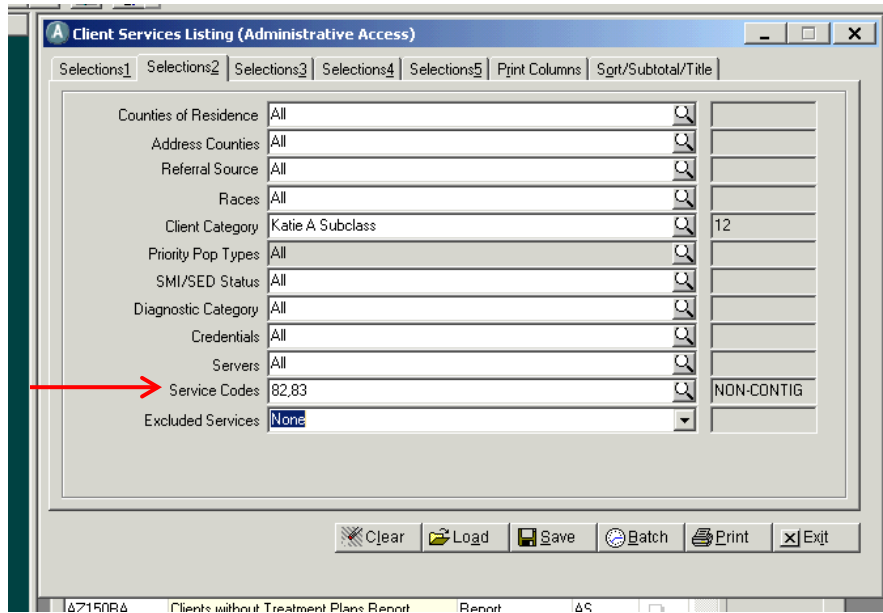
## 2. Client Services Listing Report

- a. This report allows you to see the services that are received by the Katie A Subclass clients at your program. This report is useful for determining whether the Katie A Subclass clients in your program are receiving KTA ICC (Services Code 82) or KTA IHBS (Services Code 83) services. Please note that services will only be pulled for the client after the Katie A Subclass Client Category Field was updated. For example, if the Client Category Katie A Subclass field was activated 10/1/13, this report will only pull those services for that client from 10/1/13 forward.
- b. **“Load” Template – Katie A Subclass Client Services.**
  - i. Start by selecting the Kokopeli (or “Systems” button) in the top left of the Clinician’s Homepage.
  - ii. Select Menu → Client Data → Client Services → Client Services Reports Menu → Client Services Listing.
  - iii. Select the “Load” button and select the report “Katie A Subclass Client Services”.
- c. Selection 1:
  - i. Enter the “Unit(S)” for your program(s)
  - ii. Please Note: if you would like to pull this report for a specific client, rather than all Katie A Subclass clients in your program, you can enter the Client Case Number in the “Clients” field.

Field	Value
Clients	All
Units	Administration
SubUnits	All
Program Category Headings	All
Program Categories	All
Unit Types	All
Administrative Groups	All
Assignment Types	All
Pay Source Type	All
Benefit Plan Types	All
Pay Sources	All
Benefit Plans	All
Service Types	All
Client ZIP	All

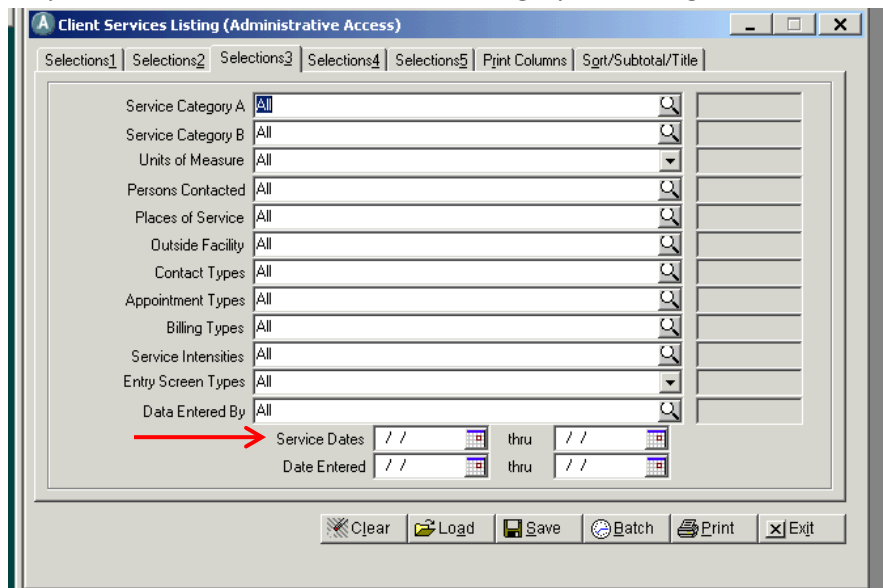
d. Selection 2:

- i. Please Note: if you would like to pull on those KTA specific services received by clients in your program, entered "82,83" in the "Services Codes" field



e. Selection 3:

- i. Enter the "Service Dates" for the date range of services you would like to pull. Please note that only services received after the Client Category was changed to "Katie A Subclass" will be pulled.



f. Sort/Subtotal/Title:

- i. Click "Print". Make sure "Screen" is selected, and click "OK".

Please contact BHS Quality Improvement ([QIMatters@sdcounty.ca.gov](mailto:QIMatters@sdcounty.ca.gov)) with any questions regarding Katie A Report Templates.