# **CCBH Reports Manual**

**HHSA Behavioral Health Services** 

**MIS Unit** 

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### **Report Types**

The following report types are available in CCBH. For a more complete list please refer to Appendix - CCBH Reports section on page 6. The various reports can be located in CCBH by using Quick View, as well as working through the main headings in the CCBH menu. Within the general heading of a report are templates, built to give programs what is needed. Reports can be customized for internal program needs, but they cannot be saved as templates in CCBH. The BHS Performance Improvement Team (PIT) is responsible for editing and designing templates.

**Client Assignments reports** 

**Client Financial Information reports** 

**Client Authorizations reports** 

**Client Reviews reports** 

**Client Services reports** 

ATP reports

Scheduler reports

**Reports Training** is offered through Optum for detailed instructions on accessing and running reports. Register for Reports Training at: <u>www.regpacks.com/optum</u>

#### **CCBH Reports Assistance**

For assistance with CCBH reports, please contact the BHS QI Performance Improvement Team (PIT) unit or the Optum Support Desk.

-BHS QI Performance Improvement Team (PIT) unit: <u>BHSQIPIT.HHSA@sdcounty.ca.gov</u> -Optum Support Desk: <u>sdhelpdesk@optum.com</u> **2**: 1800-834-3792

-MIS Help Desk: MISHelpDesk.HHSA@sdcounty.ca.gov 2: 619-584-5090

## Running Reports in CCBH

A general guide for running a report is outlined below. The steps to run all reports are very similar. This example shows how to run the Client Roster report.

From the Clinician's Home Page Systems button, follow the path to Client Roster Report:

Ch.						
File Home Vie	2W					
Open	Recently Opened Views	Services	▲ System eRx not available	Pharmacy	Break The	Lavout and
	Application Menu			Directory	Glass	Filters *
Menu		<b>Froup Notes</b>	ePrescribing Status	Pharmacies 8	Break Glass	Panel Options
Security >	Client Profile					
About CCBH	Scheduler >					
	Client Assignments	Client	t Assignments Maintenance		-	
	Client Financial Information	Client	t Treatment Sessions Maintenan	ce		
	Client <u>R</u> eviews	Client	t Categories Maintenance			
	Client <u>S</u> ervices ►	Assign	nment Current Server History Ma	aintenance		
	ATP >	Client	t Assignments Reports			Client Roster Report
	System Tools					Client Assignments Report (Landscape)
	PN >					Client Attendance Report
						Client Assignments Report (Portrait)
						Length of Stay Report
						UnDuplicated Client Assignments Matrix Report
						CaseLoad Performance Report
						Discharge Report

The report View displays (see pic below). This View consist of multiple tab pages on the top referred to as Selections1, Selections2 and so on.

Select the Load button to open the templates view:

Clients		
Client Status	All	
Units	All 🔍	
SubUnits	All Q	_
Program Category Headings	All Q	
Program Categories	All Q	
Unit Types	All Q	
Administrative Groups	All Q	
Assignment Types	All 🗸	_
Assignment Servers	All Q	
Treatment Teams	All Q	
Treatment Team Leaders	All	_
Absence Types	All	

The template menu displays with multiple types of reports. When a template is selected, click the Load button again:

Load Template for Client Roster Report				
Description	Created On	Created By Last I	Jsed 🔺	
AB 109 5 Subunit roster	08/05/2016	12771 04/11/	/2019	
AB109 MANAGEMENT REPORT	12/07/2011	4855 12/13	/2018	
AOT COURT ORDERED ROSTER REPORT	08/02/2018	12882 03/26/	/2019	
AOT VOLUNTARY ROSTER REPORT	08/02/2018	12882 04/02/	/2019	
Admissions Morning Report	08/24/2010	33 04/12/	/2019	
Alphabetical Program Roster	06/04/2009	33 04/12	/2019	
Bad Address Template	10/07/2013	8987 02/20	/2019	
CONSERV REP PIT	05/08/2014	10633 02/20	/2019	
CRISIS RESIDENTIAL MANAGEMENT - SIN	G 07/09/2018	16003 04/09/	/2019 🗸	
X	Delete Q Ein	nd <u>🚅 L</u> oad	<u>≭</u> Ca <u>n</u> cel	

Always change the Units and select your Unit. Otherwise you will run a report for the entire system of care:

	Client Roste	Report (Show Access)	
Selections <u>1</u>   Selections <u>2</u>   Selec	ctions <u>3</u>   Selectio	ns <u>4</u>   P <u>r</u> int Columns   S <u>o</u> rt/Subtotal/Title	
Clients	All	<u> </u>	
Client Status		<u> </u>	
Units	Administration		<u> </u>
SubUnits	All	Q	
Program Category Headings	All	Units Lookup	×
Program Categories	All	(	
Unit Types	All		Phone ^
Administrative Groups	All	1140 CO ADULT FORENSIC EVAL	530-477-9800
Assignment Types	A - Admitted As	1610 CO AIS SENIOR TEAM	010 001 0041
Assignment Servers		1320 CO CASE MGMT	
Treatment Teams	AII	1520 CO CENTRAL JAIL	619-615-2431
	Aii	1330 CO CONSERVATORSHIP	619-692-5697
Treatment Team Leaders	All	1310 CU EAST COUNTY CUNIC (A)	619-401-5424 619-401-5500
Absence Types	All	1620 CO EDGEMOOR DPSNF	619-596-6360
		Active C InActive	C All
		<u> </u>	<u>O</u> K Ca <u>n</u> cel

Selections tabs may be used to gather the criteria required for the report. In the Reports Training you will receive specific instructions.

You can print the report to your screen, or you can export to a csv file. Reports can also be Batched for long reports running at specified times.

## Appendix – CCBH Reports Listing

<b>Client Assignment Reports</b>	Templates	Path to Report
Client Roster Report	AB 109 5 Subunit Roster	Menu>Client Data>Client
•	AB 109 Management Report	Assignments>Client Assignments
	Admissions Morning Report	Reports
	Alphabetical Program Roster	
	Bad Address Template	
	Conserv Rep PIT	
	Crisis Residential Management – Single Day	
	Report	
	Crisis Residential Management Report BHPIT	
	Caseload Roster by SubUnit and Server	
	Census Report for 24 Hour Programs	
	Client Assignment Tracking Report	
	Client Discharge Report	
	Client Roster	
	Client Tracking with SubUnit Name and Phone	
	Clients Discharged During Date Range	
	Clients With Inactive Servers	
	Hospital Weekly Census BHPIT	
	Homeless Active Client Roster Report	
	Katie A Class Client Roster	
	Katie A Subclass Client Roster	
	Long Term Care Management Report	
	LTC in County	
	LTC OOC Admits	
	LTC Report	
	Legal Entity Caseload Count by Unit SubUnit	
	Med Rec Daily New Clts With SubUnit Name	
	and Phone	
	Medical Records Daily New Client Audit Single	
	Medical Records Daily New Clients Audit	
	Most Recent Living Arrangement	
	POFA Rosters for PII	
	Readmission Outcome Report – Inpatient	
	Zip Code Mall Address Report	
Client Assignments Day art	Client Acr Dateil Date (for ADC ret)	Manue Client Datas Client
(Landssans)	Eaco Shoot	Assignments Client Assignments
(Landscape)		Reports
Client Assignments Report	ADC Assignments Closed During	Menu>Client Data>Client
(Portrait)	ADC Assignments Opened From	Assignments>Client Assignments
	ADC Assignments in Effect	Reports
	ADC_Begin_Count_Detail	
	Asgmt_All_Client (for ADC rept)	
	MIS-2 – Adult Inpatient Assignment Services	
	MIS-2 – Adult Inpatient Discharged Assignments	
	MIS-2 – Adult Outpatient Assignment Serviced	

	MIS-2 – Adult Outpatient Discharged	
	Assignments	
	MIS-2 – Child Outpatient Assignment Served	
	MIS-2 – Child Outpatient Discharged	
	Assignments	
Client Attendance Report	Client Length of Stay Report	Menu>Client Data>Client
		Assignments>Client Assignments
		Reports
Length of Stay Report	Length of Stay by Server	Menu>Client Data>Client
	Bed_Days	Assignments>Client Assignments
		Reports
Unduplicated Client Assignments	Assignment Discharge Reason by Primary Dx	Menu>Client Data>Client
Matrix Report	Class	Assignments>Client Assignments
-	Demographics by Ethnic Age and Prim Dx Class	Reports
	Adult	
	Demographics by Ethnic Age and Prim Dx Class	
	Child	
	Demographics by Race Sex and Primary Dx Class	
	Hospital Weekly Census Medical	
	Long Term Care Demographics	
Case Load Performance Report	Client Readmission Report by Client	Menu>Client Data>Client
		Assignments>Client Assignments
		Reports
Discharge Report	Discharge Report	Menu>Client Data>Client
		Assignments>Client Assignments
		Reports

Client Financial Reports	Templates	Path to Report
California Clients Financial	UMDAP Anniversary Report	Menu>Client Data>Client Financial
Review Report	UMDAP NEEDED NO MEDI-CAL	Information>Client Financial
-		Review Menu>Financial Review
		Reports
Client 3 <sup>rd</sup> Party Coverage Reports		Menu>Client Data>Client Financial
Client 3 <sup>rd</sup> Party Coverage Report	9998 Update Ins Report Program	Information>Client 3rd Party
	All 3rd Party Coverages Report	Coverage Menu> Client 3rd Party
	Cal MediConnect Report	Reports
	Clients with Medi-Cal Coverage	
	Des server Mardianes Cliente Des est	
Client Insurance Eligibility Report	Program Medicare Clients Report	
Payment Applications Report	3rd Party Remittance List_MHB	
	Client 3rd Party Payment Report	
	Medi-Cal Denied Claims report	
	Payment Application Claims Paid Report	
<b>Client Authorizations Reports</b>		Menu>Client Data>Client Financial
Authorization Notification Report	Day Treatment Services Without Authorization	Information>Client Authorizations
Authorized Services Penert	No Tomplato	Menu> Client Authorizations
Authorized Services Report		Reports Menu
Client Authorizations Report	Day Treatment Authorization Renewals Due	
Registered and UnRegistered Services- Report	Unauthorized Ancillary Services	

Client Review Reports	Templates	Path to Report
Client Diagnosis Report	Client All Diagnoses Report	Menu>Client Data>Client
	Dual Diagnosis Client Report	Reviews> Client Reviews Reports
	Invalid Diagnosis Report	
Timeliness of Review Entry	No template	Menu>Client Data>Client
Report		Reviews> Client Reviews Reports
Client Services Report	1 Program Integrity Audit by Date of Service	Menu>Client Data>Client
-	998 Client Progress Note Audit Report	Services>Client Services Reports
	AB109 Client Services	Menu
	Bed Day Services By Unit and SubUnit	
	CO QI Only Peer Service Utilization	
	CSR-Testing	
	Client Progress Note Audit	
	Client Progress Note Audit-Billing Audit	
	Client Progress Note Audit – Received Services	
	Client Service Detail Data (for ADC Rpt)	
	Client Services – Scheduled & No Show	
	Clinician Sessions by Server and Client	
	Face to Face Time Only Report	
	Group Service Codes by Unit Report	
	Legal Entity Service Category A by Unit SubUnit	
	Legal Entity Service Code Summary by Unit	
	MAA Units of Service Report	
	Medi-Cal AB 109	
	Other Non Billiphia Support	
	PR Views No Show Poport	
	Poor Poport CO OL Only	
	Pay Source 9999	
	Productivity Service Category A by Unit SubUnit	
	Productivity by Service Category A and Server	
	Productivity by Service Code and Server	
	Productivity by Service Code and Unit SubUnit	
	Program Monitoring by Staff Report	
	QI MRR Report	
	QM Client Services Audit Report	
	QM Focus Review Template	
	Service Audit by Service Indicator Order of Entry	
Client Services Listing	ACT Intensive Fidelity Report	Menu>Client Data>Client
	ACT SBCM Fidelity Report	Services>Client Services Reports
	All ICC and IHBS Services Rrepot	Menu
	Audit by Date Entered Serv Indicator Entry	
	Order	
	Audit In Serv Indicator Entry Order By Server	
	Conserv Report/PIT	
	Client_Serv_List_SSN_DOB	
	Exodus Central AB 109	
	Family Therapy Report	
	Interpreter Services – CSU	

	Katie A SubClass Client Services	
	MHB -OA 201/201 Client Plan	
	POFA Services for PIT Reporting	
	Physician Services by Client	
	OM Chart Report	
	SMT review	
	Service Data Entry Audit Report By Client	
	Service Data Entry Audit hy Service Date	
	Service Data Entry Addit by Service Date	
	Units of Service	
Dunlicate Services Report	Duplicate Case Mamt Serv Report	Menu>Client Data>Client
Duplicate Services Report	Duplicate Services Report	Services > Client Services Reports
	Duplicate Services Without CM TBS MAA	Menu
	No MAA Duplicate Services	Wend
3 <sup>rd</sup> Party Billing Suspense	Cnty OHC Suspense	Menu>Client Data>Client
Poport	OHC County Elia	Services>Client Services Reports
Report	Program Billing Suspense Report	Menu
Timolinoss of Sonviso Entry	Timeliness of Service Entry	Menus Client Datas Client
Timeliness of Service Entry	Timeliness of Service Entry by Server	Sonvicos Client Sonvicos Poports
Report	Timeliness of Service Entry by Server	Monu
Client Comisse Management	Client Management Daymont Depart	Menus Client Datas Client
	Monthly Suspanse Summary Deport	Menu>Client Data>Client
Report	Monthly Suspense Summary Report	Menu
UnDuplicated Clients Served	ADC Unduplicated Clients Served	Menu>Client Data>Client
Matrix Report	Unduplicated Clients Rec'd Service Code 32	Services>Client Services Reports
•	Report	Menu
	Unduplicated Clts W/Katie A ICC Services Report	
	Unduplicated Clts W/Katie A IHBS Services	
	Report	
Downloaded Services Report	10 7	Menu>Client Data>Client
-	All Forms All Services	Services>Client Services Reports
	All Services	Menu
	Daily Report	
	Downloaded Services Report	
	Intervention Report 1	
	New Report 10 7	
	Weekly Report 801	
	Weekly Report	
Services Exceptions Report	Open Clients with No Services	Menu>Client Data>Client
		Services>Client Services Reports
		Menu
Downloaded Services Suspense	Downloaded Services Suspended Monitoring	Menu>Client Data>Client
Report	Report	Services>Client Services Reports
	NCMHC	Menu
	NCMHC Suspense Report	
	Report Review	

Scheduler Reports	Templates	Path to Report
Schedules Report	Individual Staff Schedule	Menu>Scheduler>Scheduler
-	SubUnit Schedule by Lead Staff	Reports
Print Appointment Sheets	Appointment Sheets by Staff and Date	Menu>Scheduler>Scheduler
		Reports
Scheduler Insurance Coverage	Insurance Coverage Client by Alpha	Menu>Scheduler>Scheduler
Report		Reports
Scheduled Services Report	Scheduled Services by Unit SubUnit Server and	Menu>Scheduler>Scheduler
-	Date	Reports

ATP Reports	Templates	Path to Reports
Assessment and Treatment	AB109 Screening Form Non Final Approved	Menu>ATP>ATP Reports
Plan Listing	Assessments Final Approved by Primary Signer	
	Assessments Not Final Approved	
	Assessments and Client Plans Not Final	
	Approved	
	BHA's	
	Client Plans Final Approved by Primary Signer	
	Client Plans Not Final Approved	
<b>Clients without Treatment</b>	Clients Without Treatment Plans by SAI	Menu>ATP>ATP Reports
Plans Report		
Diagnosis Code Listing	No Template	Menu>ATP>ATP Reports
<b>Client Action Notification</b>	Assessments Past Due and Pending by Server	Menu>ATP>ATP Reports
Report	Past Due Assessments by Server	
<b>Client Action Schedules Report</b>	Client Assessment Due Dates by Action Status	Menu>ATP>ATP Reports
	Client Assessments Pending by Future Due Date	
	Missed Client Assessments by SAI	
Progress Notes Report	Non-Final Approved PN Report by Created ID	Menu>ATP>ATP Reports
	Non-Final Approved Progress Notes Report	
Missing Progress Notes Report	Missing and Not Final Approved Progress Notes	Menu>ATP>ATP Reports

Access to Services Journal Report	Templates	Path to Reports
Access to Services Journal	A2S Journal Report MH Made Appts Only	Menu>ATP
Report	A2S Journal Report MH Made/Declined Appts	
•	A2S Journal Report Psych-Made Appt Only	
	A2S Journal Report Psych-Made/Decline Appt	
	A2S Journal Report QM	
	Access Times Full Data Report	

Not a Report, but Helpful	Table/Listing	
System Tools	Pay Sources Listing	
	Service Codes Listing	
	Staff Maintenance	
	Units Listing	
	SubUnits Table	
	Quick View	