CCBH Reports Manual

HHSA Behavioral Health Services

MIS Unit

Contents

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: www.regpacks.com/optum

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:* BHSQIPIT.HHSA@sdcounty.ca.gov
-*Optum Support Desk:* sdhelpdesk@optum.com ☎: 1800-834-3792
-*MIS Help Desk:* MISHelpDesk.HHSA@sdcounty.ca.gov ☎: 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:
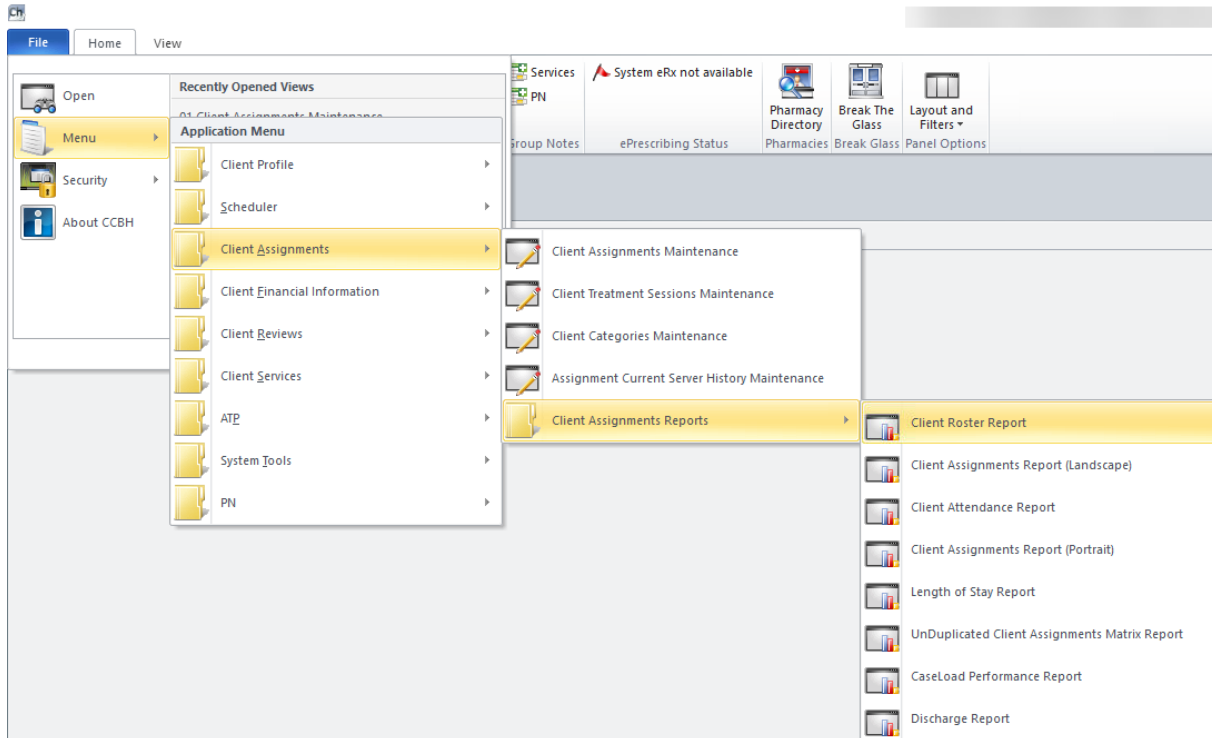
The report View displays (see pic below). This View consist of multiple tab pages on the top referred to as Selections1, Selections2 and so on.

Select the **Load** button to open the templates view:
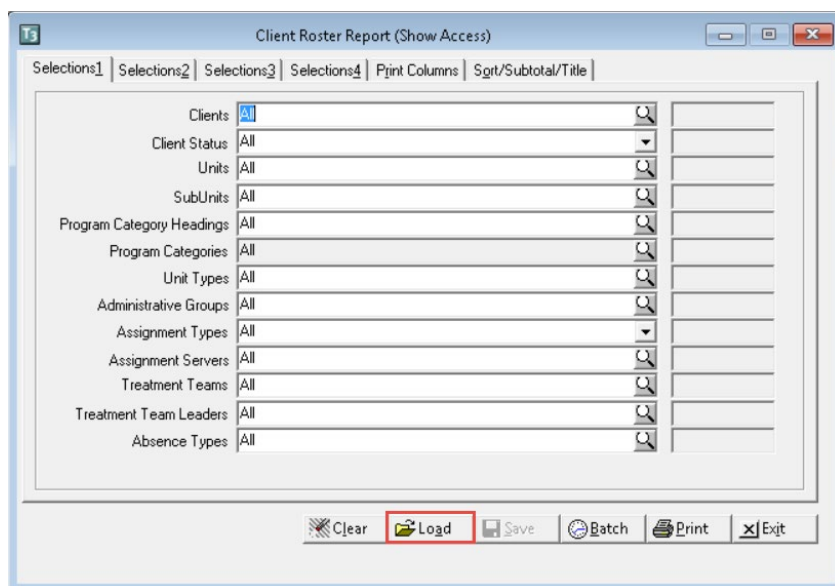
The template menu displays with multiple types of reports. When a template is selected, click the Load button again:
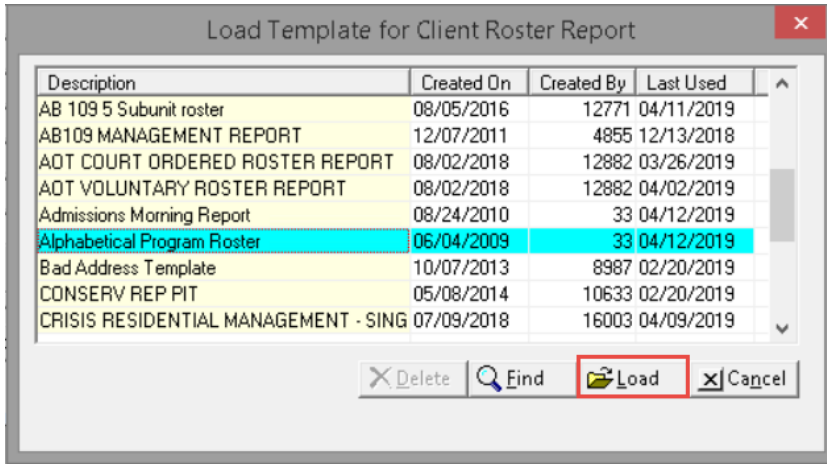
Always change the Units and select your Unit. Otherwise you will run a report for the entire system of care:
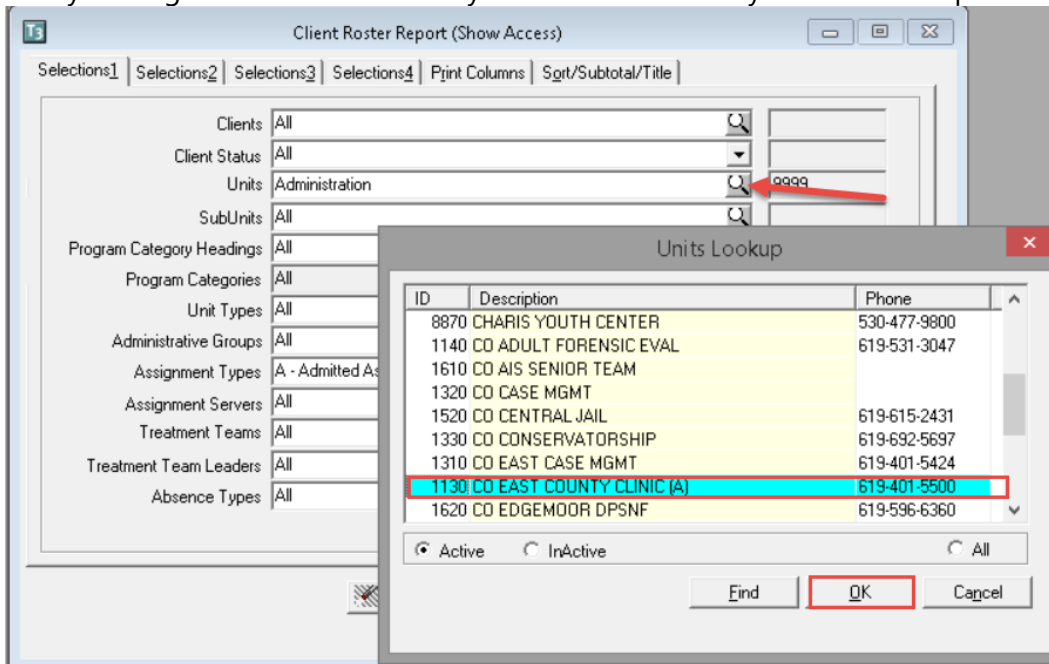
Selections tabs may be used to gather the criteria required for the report. In the Reports Training you will receive specific instructions.

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

Client Assignment Reports	Templates	Path to Report
Client Roster Report	AB 109 5 Subunit Roster AB 109 Management Report Admissions Morning Report 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 Line Medical Records Daily New Clients Audit Most Recent Living Arrangement POFA Rosters for PIT Readmission Outcome Report – Inpatient Zip Code Mail Address Report Zip Code Physical Address Report	Menu>Client Data>Client Assignments>Client Assignments Reports
Client Assignments Report (Landscape)	Client Asg Detail Data (for ADC rpt) Face Sheet	Menu>Client Data>Client Assignments>Client Assignments Reports
Client Assignments Report (Portrait)	ADC Assignments Closed During ADC Assignments Opened From ADC Assignments in Effect 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	Menu>Client Data>Client Assignments>Client Assignments Reports

	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 Bed_Days	Menu>Client Data>Client Assignments>Client Assignments Reports
Unduplicated Client Assignments Matrix Report	Assignment Discharge Reason by Primary Dx Class Demographics by Ethnic Age and Prim Dx Class 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	Menu>Client Data>Client Assignments>Client Assignments Reports
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 Review Report	UMDAP Anniversary Report UMDAP NEEDED NO MEDI-CAL	Menu>Client Data>Client Financial Information>Client Financial Review Menu>Financial Review Reports
Client 3rd Party Coverage Reports Client 3rd Party Coverage Report Client Insurance Eligibility Report Payment Applications Report	9998 Update Ins Report Program All 3rd Party Coverages Report Cal MediConnect Report Clients with Medi-Cal Coverage Program Medicare Clients Report 3rd Party Remittance List_MHB Client 3rd Party Payment Report Medi-Cal Denied Claims report Payment Application Claims Paid Report	Menu>Client Data>Client Financial Information>Client 3rd Party Coverage Menu> Client 3rd Party Reports
Client Authorizations Reports Authorization Notification Report Authorized Services Report Client Authorizations Report Registered and UnRegistered Services-Report	 Day Treatment Services Without Authorization No Template Day Treatment Authorization Renewals Due Unauthorized Ancillary Services	Menu>Client Data>Client Financial Information>Client Authorizations Menu> Client Authorizations Reports Menu

Client Review Reports	Templates	Path to Report
Client Diagnosis Report	Client All Diagnoses Report Dual Diagnosis Client Report Invalid Diagnosis Report	Menu>Client Data>Client Reviews> Client Reviews Reports
Timeliness of Review Entry Report	No template	Menu>Client Data>Client Reviews> Client Reviews Reports
Client Services Report	1 Program Integrity Audit by Date of Service 998 Client Progress Note Audit Report AB109 Client Services 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 SubUnit MAA Units of Service Report Medi-Cal AB 109 No Show Summary By Service Code and Server Other Non Billable Support PB Views No Show Report Peer Report CO QI 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	Menu>Client Data>Client Services>Client Services Reports Menu
Client Services Listing	ACT Intensive Fidelity Report ACT SBCM Fidelity Report All ICC and IHBS Services Rrepot 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	Menu>Client Data>Client Services>Client Services Reports Menu

	Katie A SubClass Client Services MHB -QA 201/201 Client Plan POFA Services for PIT Reporting Physician Services by Client QM Chart Report SMT review Service Data Entry Audit Report By Client Service Data Entry Audit by Service Date Services Listing for Bed Day Programs Units of Service	
Duplicate Services Report	Duplicate Case Mgmt Serv Report Duplicate Services Report Duplicate Services Without CM TBS MAA No MAA Duplicate Services	Menu>Client Data>Client Services>Client Services Reports Menu
3rd Party Billing Suspense Report	Cnty OHC Suspense OHC County Elig Program Billing Suspense Report	Menu>Client Data>Client Services>Client Services Reports Menu
Timeliness of Service Entry Report	Timeliness of Service Entry Timeliness of Service Entry by Server Timeliness of Service Entry by Server 5 Day Doc	Menu>Client Data>Client Services>Client Services Reports Menu
Client Services Management Report	Client Management Payment Report Monthly Suspense Summary Report	Menu>Client Data>Client Services>Client Services Reports Menu
UnDuplicated Clients Served Matrix Report	ADC Unduplicated Clients Served Unduplicated Clients Rec'd Service Code 32 Report Unduplicated Clts W/Katie A ICC Services Report Unduplicated Clts W/Katie A IHBS Services Report	Menu>Client Data>Client Services>Client Services Reports Menu
Downloaded Services Report	10 7 All Forms All Services All Services Daily Report Downloaded Services Report Intervention Report 1 New Report 10 7 Weekly Report 801 Weekly Report	Menu>Client Data>Client Services>Client Services Reports Menu
Services Exceptions Report	Open Clients with No Services	Menu>Client Data>Client Services>Client Services Reports Menu
Downloaded Services Suspense Report	Downloaded Services Suspended Monitoring Report NCMHC NCMHC Suspense Report Report Review	Menu>Client Data>Client Services>Client Services Reports Menu

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

ATP Reports	Templates	Path to Reports
Assessment and Treatment Plan Listing	AB109 Screening Form Non Final Approved 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	Menu>ATP>ATP Reports
Clients without Treatment Plans Report	Clients Without Treatment Plans by SAI	Menu>ATP>ATP Reports
Diagnosis Code Listing	No Template	Menu>ATP>ATP Reports
Client Action Notification Report	Assessments Past Due and Pending by Server Past Due Assessments by Server	Menu>ATP>ATP Reports
Client Action Schedules Report	Client Assessment Due Dates by Action Status Client Assessments Pending by Future Due Date Missed Client Assessments by SAI	Menu>ATP>ATP Reports
Progress Notes Report	Non-Final Approved PN Report by Created ID Non-Final Approved Progress Notes Report	Menu>ATP>ATP Reports
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 Report	A2S Journal Report MH Made Appts Only 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	Menu>ATP

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