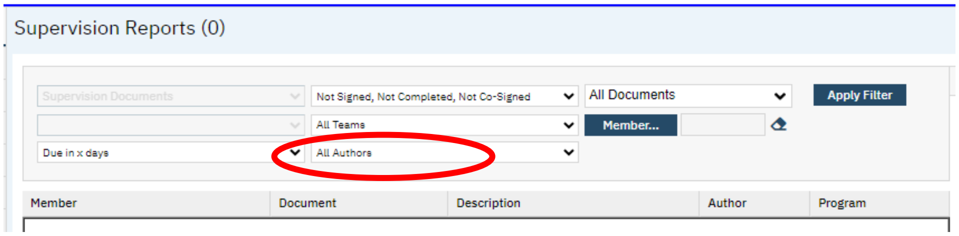
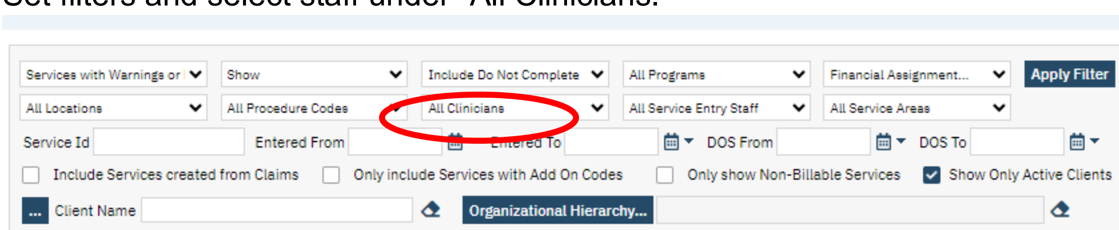
HIT WEEKLY/MONTHLY REPORTS

1. **Supervision Report** Supervision Reports (My Office)
    a. This report is accessed through the Supervisee Documents widget on your Dashboard.
    b. Set filters and add staff name in “All Authors” field.

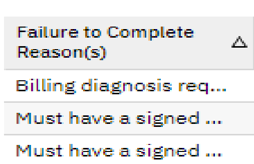


    c. Click Apply Filter to see list.
    d. You can use the export icon  in the upper right corner to put report in excel.
    e. Once in excel, click the “Enable Editing” box. You can then sort by description to remove the future appointments.
        i. In Progress – Staff is author – Staff has started note or assessment document but has not completed and signed. For an appointment it could be that appointment has only been marked as “Show.”
        ii. In Progress – Another staff is author – Staff is assigned to co-sign, but author has not completed and signed, so document is not available for co-signature. (The co-sign will be grayed out)
        iii. Signed – Another staff is author – ready for staff to co-sign.
        iv. To Do - Appointment is in the past in “scheduled” status and needs to be resolved with a note.
    f. Save report in reports folder on I Drive

2. **Billing** – Services with Errors (Services My Office)
    a. Set filters and select staff under “All Clinicians.”

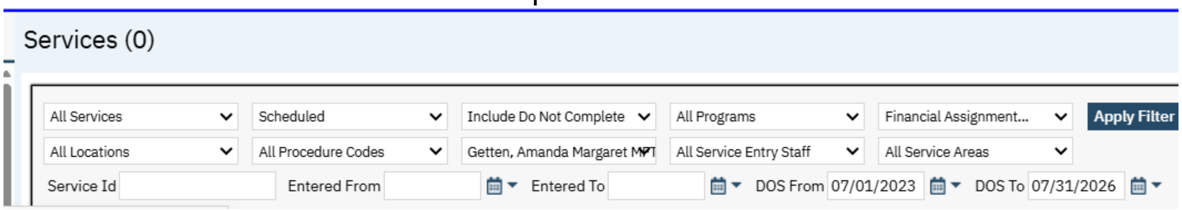


    b. Click apply filters to see the list.
    c. The reason for the error/warning will show in the column. “Failure to Complete Reason(s).”



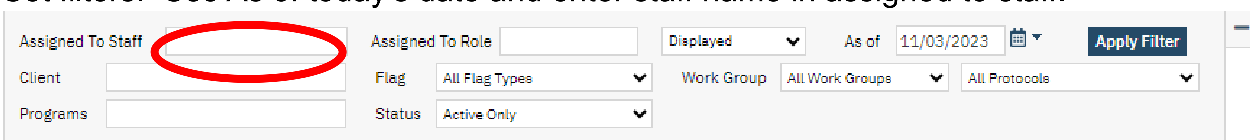
    d. Export to Excel, enable editing and save to reports folder in I Drive.

3. **Unresolved Services** – Scheduled Services to be resolved (Services My Office)
   a. Set filters and select staff under "All Clinicians."
   b. Use a DOS To end date of one week prior.

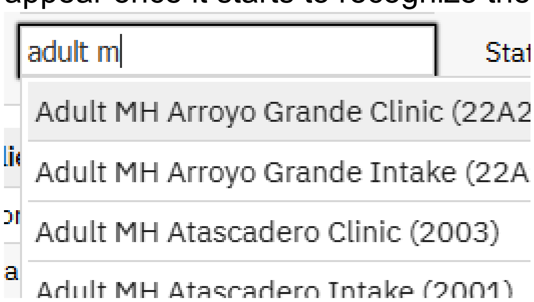


   c. Click apply filters to see the list.
   d. Export to Excel, enable editing and save to reports folder in I Drive.

4. **Client Flags** Client Flags (My Office)
   a. Set filters. Use As of today's date and enter staff name in assigned to staff.

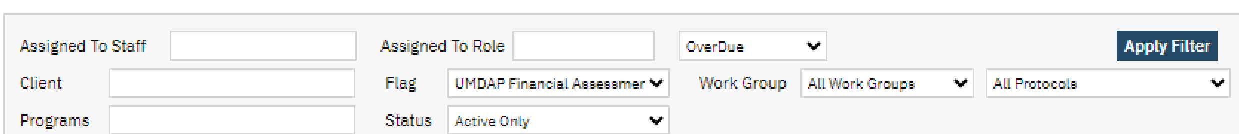


   b. Click apply filters to see list.
   c. Export list to an excel spreadsheet, enable editing, and save to reports folder on I Drive.
   d. You can also run by program by typing the name of the program, a drop down will appear once it starts to recognize the name.



   e. This will be useful to check if a flag was not assigned to a staff or to see intake flags to review.

5. **Monthly UMDAP Rollover**- (Client Flags (My Office)
   a. This should be run monthly at the beginning of the month.
   b. Set filters, use "As of" today's date, you may select Overdue or Display depending on date you run. Enter Assigned to Staff or Program name.



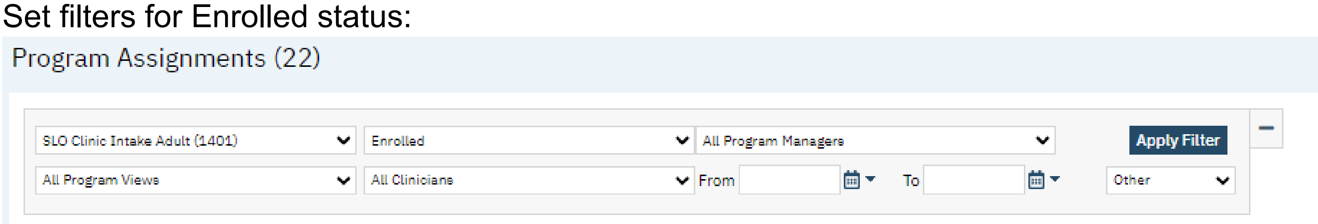
   c. For all past due or due now flag notifications, verify client's Medi-Cal status.
   d. Check Client Fee screen to verify UMDAP dates match your flag.

e. If full scope Medi-Cal or Medi/Medi, and Medi-Cal has been verified, you can launch the new UMDAP Financial Assessment to cover the next UMDAP period (See Non-UMDAP Client's Procedure).
    i. For BHSA funded programs (Latino Outreach, ACT, HFW BHSA), grant funded programs, or contracted programs like Child Advocacy Center when client does not have Medi-Cal we will also roll over the UMDAP once status has been verified. Ensure UMDAP Financial Assessment states that client is not currently eligible for Medi-Cal.
    ii. If client has Private Insurance or Medi-Care we will leave that information in the UMDAP Financial Assessment, if client has no insurance, we will add the BHSA program or "other funding source" in the Insurance box on the second tab of the UMDAP Financial Assessment.

f. Once the new UMDAP is completed mark the flag as complete and set a new one for the next year.

g. If client has Medi-Care, private insurance or no funding source notify the primary staff (clinician, LPT or case manager) that a new UMDAP will need to be completed for the client per the UMDAP Clients Procedure.
    i. If client has lost Medi-Cal coverage set the flag.
        1. Private Insurance/Medicare Only
            a. In Note section state that client should be linked to covered provider, if client previously had Medi-Cal/other funding note date ended - *Connect Client with Covered Provider* **or** *Connect Client with Covered Provider-Medi-Cal Ended 2/29/2024.*
            b. Set display date as current date and due date at 90 days.
            c. Assign flag to primary staff, program supervisor, and HIT.
        2. No Insurance Coverage/Funding
            a. In Note section state date that insurance coverage/funding source ended, *-No Medi-Cal as of 3/1/2024.*
            b. Set display date as current date and due date at 90 days.
            c. Assign flag to primary staff, program supervisor, and HIT.

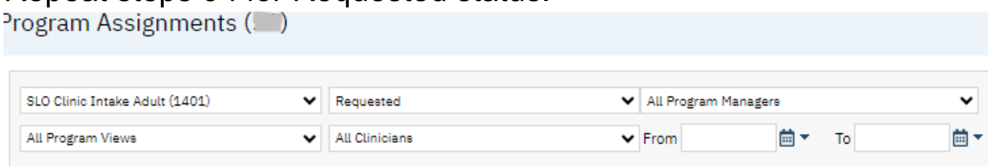
6. **Monthly Review of Intake Programs** - Enrolled and Requested (Program Assignments (Program)
    a. This should be run monthly to check for clients in enrolled or requested status for intake program to check for missed discharges or Fail to Show (FTS) closings.
    b. Go to Program Assignments (Program)
    c. Set filters for Enrolled status:



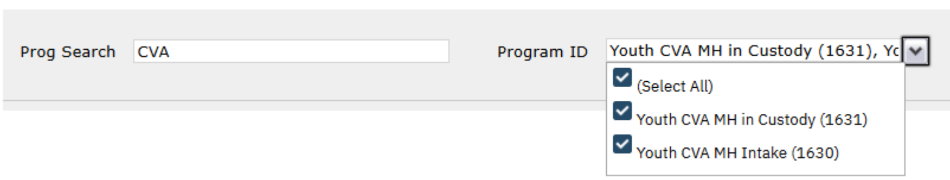
d. Check dates for clients that have been enrolled in program for an extended length of time.

Status	Date Requested	Date Enrolled	Date Discharged	F
Enrolled		04/18/2023		S
Enrolled		04/27/2023		S

e. Verify whether Intake was completed. Was client an FTS.
f. Discharge as appropriate; if FTS complete Closing Audit.
g. Repeat steps c-f for Requested status.



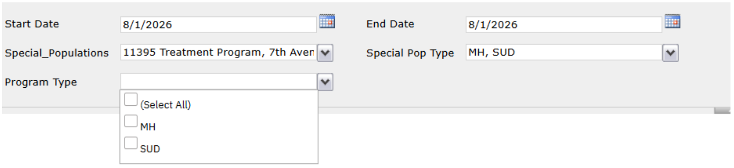
7. **Monthly Caseload Review** – SLO Clients Last Seen (My Office) Report
    a. Launch Report
    b. In program search box enter something to narrow the search and tab to Program ID box, you can then select your programs. Then click View Report.



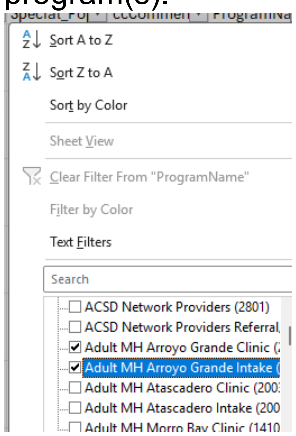
    c. Export report to CSV (comma delimited) file. This will put it in excel without the merged cells.
    d. Fix Columns (resize, center, and wrap text) so it is easier to view/print and add filter.
    e. Sort by staff and number of days since last service, filter to:
        i. More than 25 days DAS
        ii. More than 90 days MH
    f. For staff with clients to review limit investigation to no more than five clients.
    g. Add a column for notes and be detailed about investigation.
    h. Share with staff/supervisors only the ones that staff need to act on.
    i. Save to Reports folder in I Drive.

8. **Monthly Special Population Report** – SLO Special Populations for all Programs (My Office)
    a. Launch Report
    b. Start and End date should be the 1st of the month, Special Pop Type should be all if running for an SUD program and MH if running for an MH program. This report refers to the general Special Populations which is all BH as "MH."

c. For program Type select your program type MH or SUD.

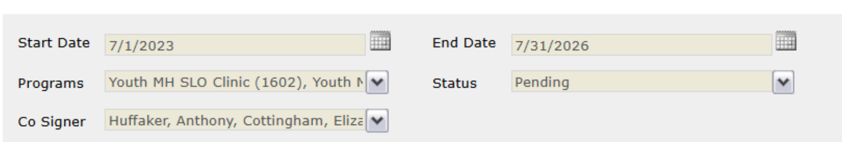


d. Export report to CSV (comma delimited) file. This will put it in excel without the merged cells.
e. Fix Columns (resize, center, and wrap text) so it is easier to view/print and add filter.
f. Sort by Program and then Special Population. Use filter to remove all but your program(s).



g. Hide columns not needed (Special Population end date, comment field, program request, and program discharge dates, Treatment Team members) and format for printing.
h. Print to PDF and save to Reports folder in I Drive for Program Supervisor to review.

9. **Monthly Co-Signature Pending Review** – CALMHSA Co-Signer Status Report (My Office)
   a. Launch Report
   b. Start date 7/1/23, End date one week prior to current date. Select your program(s) and select Pending for Status.



   c. Export report to CSV (comma delimited) file. This will put it in excel without the merged cells.
   d. Fix Columns (resize, center, and wrap text) so it is easier to view/print and add filter.
   e. Review for dates/staff names that look odd.
   f. Send follow-up emails to staff for items that are needed and overdue.

10. *Engagement Programs Only (ACSD Authorizations, ACSD CAT, TMHA Wellness)*
    Monthly Program-Last Service CALMHSA Open Enrollments and Last Service Date Report
    a. Launch Report
    b. Select program(s), and view report
    c. Export report to CSV (comma delimited) file. This will put it in excel without the merged cells.
    d. Fix Columns (resize, center, and wrap text) so it is easier to view/print and add filter.
    e. Filter to show only clients with no services in appropriate (per program requirements) number of days.
    f. Use to audit (ACSD Authorizations) or save report and send to Program Supervisor to review for clients to close.