

AVATAR Option (Report) Name	Usage	Frequency	Description	Providers	Admin	Fiscal	Other	Last Revised
Adult Access Service Request	Access		Post Filing from the Service Request Option. Report of client service request				Access Teams	5/11/2009
Child Access Service Request	Access		Post Filing from the Service Request Option. Report of client service request				Access Teams	5/12/2009
Active Program Report	Admin		DBHS administrative report of currently active Avatar programs.		X	X		5/11/2011
Client Ledger (CR)	Admin		Displays service, liability and payment information across episodes. Includes sub reports of Client demographics, Diagnosis History and payment history		X	X		Go-Live
Cost by Resources Report	Admin		Report by Client Resource "Type" of all charges between a date range		X			2/9/2011
Current Users Report	Admin		Provides current user and option usage information.				SysAdmin	6/4/2009
Expiring License Report	Admin		Provides a list of practitioners with expiring licenses for MH admin.		X			2/17/2010
Official Census Report	Admin		Provides system-wide current census information by program for the date entered by the user. Can select one or more treatment settings.		X	X		Go-Live
OHC Stale Claims Report	Admin		Report of Pending OHC claims with a claim date between the selected date range.			X		6/14/2011
Outstanding Liabilities	Admin		Report of outstanding liabilities for a given date range			X		10/18/2011
System Code User List	Admin		Provides a list of users for your system code with their status and last use date.	X	X			2/22/2010
Warrant Number Report	Admin		Report of all posted warrants (paid 835 files), with a subreport for each warrant that will display by RRG, then Program, then down to the detail rows the approval totals.			X		4/8/2011
Client Ledger (SAC)	Billing Information		Displays service, liability and payment information by episode. Data is presented based on date range entered by the user. Includes sub reports of Client demographics, Diagnosis History and payment history	X	X	X		6/9/2011
Client Service Report (Weekly Staff)	Billing Information		This is a week at a glance summary of the service durations for each practitioner in a given program with totals by client and day of service.	X				10/3/2011
Client Services by Practitioner	Billing Information		Provides a list of services between a chosen date range for a specific practitioner	X	X			7/30/2010
Client Services Report (Excel Export)	Billing Information		Program level service report. All of these look at services as entered, regardless of guarantor status. This is the most "export" friendly of the Client Service Reports.	X				3/10/2010
Client Services Report (Multi-Program)	Billing Information		Modified version of the Client Services Report which returns all clients open to the programs selected (more than one can be selected) during the reporting period.	X				10/8/2010
Client Services Report (Program)	Billing Information		Modified version of the Client Services Report which returns all clients open to the program during the reporting period, with a page break on client, with their services (or a note if there were none) for an individual program.	X	X			1/15/2010
Client Services Report (Single Client)	Billing Information		Provides service information by client. Data includes service date, service code, units and duration.	X	X	X		6/7/2011
Practitioner Productivity by Program	Billing Information		This is a report by Program (single selection) that identifies all services provided within a date range entered by the user. The data is grouped by Practitioner.	X	X			7/13/2009
School District Invoice	Billing Information		For generating school district invoices based on the School District option and Guarantor 7 charges.				CCMS	9/30/2011
Services by Practitioner by Entry Time	Billing Information		Provides a list of services entered in a date range and groups by practitioner and service date, then sorts by entry time. This should closely match the Multiple Client Charge Input data sheet for validation purposes.	X				9/10/2009
Summary of Services by Program	Billing Information		Summary service report. Returns totals for services in a date range where the cost of service is greater than \$0.	X	X	X		10/12/2010

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Active Client Eligibility Comparison	Billing Maintenance	At least Monthly	Compares program active clients with the Monthly MEDS file by SSN and flags cases where the Avatar CIN for medi-cal does not match the MEDS CIN and shows Eligibility Status, primary aid code and special aid codes 1 and 2	X		X		1/12/2011
DHCS Duplicate (Show Missing CoSig)	Billing Maintenance	For CWS pilot sites only	Service related report, looks for services on the same date with a matching HCPC code. Requires entering of modifiers PRIOR to claiming.	CWS Pilots				10/6/2011
DHCS Duplicate Services Report	Billing Maintenance	Monthly, PRIOR to the month being claimed	Service related report, looks for services on the same date with a matching HCPC code. Requires entering of modifiers PRIOR to claiming.	X				5/7/2010
Guarantor 99999 Provider Report	Billing Maintenance	Monthly	Services which have no guarantor to which the liability can distribute	X	X			6/1/2011
MediCal Services with no Diagnosis	Billing Maintenance	Monthly	Service related report, looks for services falling to a Medi-Cal guarantor where the client has no diagnosis on or before the date of service for the service Episode	X	X	X		3/29/2011
Medicare/MediCal Services with no Policy	Billing Maintenance	No longer needed if using the Program Financial Eligibility Summary consistently, otherwise Monthly.	Service related report, looks for services falling to a Medi-Cal or Medicare guarantor where the client has no CIN/Policy for that guarantor	X	X	X		1/26/2010
Phase II Client Charge Status	Billing Maintenance	As Needed	This replaces the old PCCN reports, this is a client level detail of services with approvals or denials, including PCCN and denial reasons (if applicable)	X	X	X		6/3/2011
Phase II Denials by Posting Date	Billing Maintenance		This is a completely revised version of the Phase II Denials report. It is run by the date the 835 entered Avatar (was either compiled or posted).	ADS		X		11/3/2011
Phase II Program Charge Status	Billing Maintenance	At least Monthly	This is a report by service date, which will give the current claim status of all medi-cal charges for a given date range (e.g. a month) for the selected program. Over time, this report will change, with "Pending" dropping as 835s are posted back, and the other areas growing. Denials can be represented more than once here, but there are columns to indicated denials that are either transferred, or which have already been rebilled. There is also a column of "posting date" so you can tell which denials/approvals are "new" since your last run date.	X				10/14/2011
Program Financial Eligibility Summary	Billing Maintenance	As often as you like, but at least monthly	Cleanup report unrelated to services, use it to catch: <ul style="list-style-type: none"> • missing policy numbers • CINs with bad formats • clients with no guarantor • expired guarantors 	X				1/4/2011
Service Duration Outliers	Billing Maintenance	Monthly	Service related report, looks for services which exceed a duration of your choice. Useful to find those services where the data entry user put the service code in the duration field accidentally.	X	X	X		1/8/2010
Unbilled MediCal Services by Program	Billing Maintenance	Monthly, AFTER the month is claimed	Service related report, looks for services which have been "closed" by fiscal, but which for some reason were not claimed. This only reflects med-cal guarantors.	X	X	X		5/11/2011
Unbilled NON MediCal Services by Program	Billing Maintenance	Monthly, AFTER the month is claimed	Same as the above, but for NON medi-cal guarantors.	X	X	X		5/4/2011
3632 Roster	Census Maintenance		List of all clients who have a 3632 Guarantor on their Financial Eligibility, flagging those with no open CCMS episode				CCMS	8/5/2010
Active Authorizations Report	Census Maintenance		All authorizations to a program between a date range, regardless of assignment.	X	X			9/10/2009

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Admit Detail by Program (SAC)	Census Maintenance		Display detailed client information for admissions occurring between the date range entered by the user and for the selected programs	X	X			Go-Live
Authorization Check Report	Census Maintenance		Report of all open clients by program, showing the status of their most recent authorization and last date of service.	X	X			10/29/2010
Census Maintenance Report	Census Maintenance		Provides a list of all currently open clients with possible issues highlighted in red, including: start date, service coordinator, missing policy numbers, eligibility verification	X		X		4/4/2010
Clients Active In Multiple Programs (SAC)	Census Maintenance		Provides real time information regarding clients with an open episode at another provider for purposes of coordination of care.	X	X	X		Go-Live
Detailed Outpatient Census	Census Maintenance		Provides a list of clients open to a program during a date range with Primary and Secondary funding source, service coordinator, provider start date and length of stay	X	X			9/16/2009
Expiring Authorizations	Census Maintenance		Identifies authorizations that will expire within the date range entered by the user.	X	X			Go-Live
Missing CSI by Program	Census Maintenance		Shows all clients in a date range with missing CSI elements.	X	X			7/22/2011
Missing CSI Service Info	Census Maintenance		Shows all services in a date range with missing CSI information.	X	X			9/14/2011
Pending Authorizations	Census Maintenance		All authorizations to a program, both initial and re-authorizations which have not been assigned a service coordinator.	X	X			7/2/2009
Provider Last Service Report	Census Maintenance		Provides a list of currently open clients with their last date of service (and days since) where the services was not Unknown or a Phone service	X	X			7/22/2011
School District Census	Census Maintenance		For tracking school district for CCMS client				CCMS	9/30/2011
UMDAP Expiration	Census Maintenance		Provides a list of program clients with an umdap expiration within the date range selected	X	X	X		Go-Live
Adult Health Questionnaire Report	CWS		Client based stand alone report of a specific Adult Health Questionnaire.	X	X			7/15/2011
Adult Mental Status Exam Report	CWS		Client based stand alone report of a specific Adult Mental Status Exam.	X	X			7/15/2011
AIMS Report	CWS		Client based stand alone report of a specific AIMS assessment.	X	X			7/29/2011
CANS Chart Report	CWS		Client based graph over time report of CANS dimensions.	X	X			7/21/2011
Child Health Questionnaire Report	CWS		Client based stand alone report of a specific Child Health Questionnaire.	X	X			7/15/2011
Child Mental Status Exam Report	CWS		Client based stand alone report of a specific Child Mental Status Exam.	X	X			7/15/2011
Client Data Sheet	CWS		Avatar generated version of the existing CDS. Also includes the most recent MEDS file extract information if available and current Infoscriber medication and allergy information. See the "version" subreport for detailed information on where each section is pulling from Avatar.	X	X		X	9/22/2011
Client Plan Report	CWS		Basic treatment plan report, includes all sections from the treatment plan.	X	X			10/4/2011
CODA Report	CWS		Client based stand alone report of a specific CODA assessment.	X	X			7/18/2011
Core Assessment Report	CWS		Client based report including information from the Core Assessment option. Allows for inclusion of linked assessment tools (like the CODA, LOCUS, etc.) or for simultaneous printing of all linked assessments.	X	X			11/19/2011
LOCUS Report	CWS		Report based on the LOCUS	X	X			7/15/2011
Medication Service Plan Report	CWS		Client based report that displays information entered in the Medication Service Plan modeled option	X	X			7/29/2011

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Progress Note Client Report	CWS		Client based note of progress notes for a selected date range. Defaults to the the last 90 days.	X	X			10/13/2011
Progress Note Filing Report	CWS		For a single program, for a selected date range, this is a report of finalized progress notes entererd, with a page break for each client.	X				11/8/2011
Progress Note Program Search	CWS		Simiar to the above, but allows for key word search for a date range across a selected Program of service.	X	X			10/13/2011
Progress Note Search	CWS		Client based report of progress notes. Allows for selection by date range, note type, staffID, draft/final status and a search word (i.e. "assault")	X	X		X	10/13/2011
Progress Note Staff Report	CWS		Staff based version of the progress notes report, allows for reporting for one or more staff from your system code, flags notes missing co-signatures and in pending draft status. Summarizes by practitioner total hours and counts of notes.	X	X			10/14/2011
Progress Note Timeliness Report	CWS		For a single program, for a selected date range, this reports all progress notes where the number of days between the service and the entry of the note exceed a user defined number.	X	X		X	9/1/2011
Progress Notes Without Services	CWS		For a single program, for a selected date range, this report all progress notes for which there is no matching service. Groups draft notes seperately.	X	X		X	9/13/2011
Psychiatric Mental Status Exam Report	CWS		Client based stand alone report of a specific Psychiatric Mental Status Exam.	X	X			7/20/2011
Services Without Progress Notes	CWS		For a single program, for a selected date range, this reports on all services for which there is no matching progress note.	X	X		X	9/13/2011
Admit/Discharge by Program	Information		Displays total number of admissions and discharges to programs in the user's System Code during the date range selected.	X	X			7/17/2009
Client Demographics Report	Information		Displays client demographic information by Program for clients with an open episode between the date range entered by the user.	X	X			11/17/2011
Client Diagnosis Report	Information		Displays client diagnosis information by Program for clients with an open episode between the date range entered by the user.	X	X			12/2/2009
Client Resources by Type	Information		Displays information for a selected resource type for all client episodes within the users system code.	X	X			11/8/2011
Client Resources Report	Information		Displays information that has been entered for a client in Client Resources Option. This information includes family, primary physician information, ALTA, probation/parole, etc.	X	X			2/9/2010
Client Services Report (Daily Count)	Information		Provides a Calendar Layout view of All services provided in a chosen month, by Service Code, with totals for each client.	X				12/1/2009
Diagnosis and Movement History	Information		Displays diagnosis and episode history by client. Does not include any historical information on ADS episodes.	X	X	X		7/22/2010
Discharge Detail by Program (SAC)	Information		Provides detailed client information by program for the date range and program(s) selected by the user.	X	X			4/7/2010
Fiscal Program Report	Information		A report of all programs regardless of status for Fiscal maintenance work.			X		9/29/2011
Fiscal Year Summary	Information		One page fiscal year summary report by program with charts depicting: Admits, Discharges, Unduplicated Clients Served, LOS for Discharges, Unduplicated Clients Enrolled, Services by Month and Services by top 20 providers.	X	X			10/1/2010

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Guarantors by Class	Information		Guarantor report of all guarantors by financial class. If you have a guarantor that is not on this list, you can submit the necessary information to Avatar-Fiscal@Saccounty.net to have it added.	X	X	X		3/5/2010
High Utilization Report	Information		Provides a list of clients with services in a given date range showing the clients with the top 3 total costs for that date range for each program.		X			12/1/2009
Master Client Inquiry	Information		Provides Client demographic information by episode. Includes drill down reports of treatment history, diagnosis history, etc..	X	X			Go-Live
Program Charge Summary	Information		This report has been move out of the "Obsolete" section with the following undersandings of its limitations. It reflects the guarantor of the FIRST liability of a service.	X	X			7/26/2011
Program Dashboard Report	Information		Provides a high level summary of an individual program including Open, last date of service, years since admit, and breakdowns by gender, race, age, ZIP, guarantor, diagnosis.	X	X			3/2/2010
Program Performance Indicators	Information		Provides a program level summary of Length of Stay, Guarantors, Diagnoses, MHTC hospitalizations, and CSI conditions.		X			1/26/2010
Bed Availability Report	MHTC		Displays bed information by unit for the inpatient program at the MHTC. Includes number of available and occupied beds.				MHTC	Go-Live
Crestwood PHF Admission by Program	MHTC		Similar to the MHTC version, but for the PHF only				MHTC	5/26/2010
Crestwood PHF Census	MHTC		Similar to the MHTC version, but for the PHF only				MHTC	11/5/2010
Crestwood PHF Discharge Report	MHTC		Similar to the MHTC version, but for the PHF only				MHTC	5/26/2010
Current Unit Census	MHTC		Displays census information by unit for the inpatient program at the MHTC.				MHTC	Go-Live
MHTC Acute Care Utilization	MHTC		Provides admits to Inpatient and Crisis by program within a date range		X		MHTC	6/30/2009
MHTC Acute Day Report *NEW*	MHTC		Report of admin versus acute stay days during a date range by client, flagging clients under 22 or over 65.				MHTC	11/8/2010
MHTC Admission by Program	MHTC		Similar to the MHTC Census, but for clients admitted between a date range, and grouped by program		X		MHTC	3/9/2011
MHTC Client Admit History	MHTC		Provides Historical information regarding client's previous episodes to the MHTC.		X		MHTC	8/2/2010
MHTC Daily Provider Census	MHTC		Provides real time information regarding crisis and inpatient admissions to the Mental Health Treatment Center. This is used by MHTC and Outpatient Providers for purposes of coordination of care.		X		MHTC	Go-Live
MHTC Discharge Crisis Services LOS	MHTC		Provides information for billing crisis services. Calculates number of minutes/hours in crisis unit adjusting for any recorded leave time.		X		MHTC	2/24/2011
MHTC Discharge Report	MHTC		Similar to the Admission by Program, but based on discharges in date range selected				MHTC	3/9/2011
MHTC Inpatient Client Re-Admission	MHTC		Provides a list of clients that have been re-admitted to the Inpatient Program at the MHTC within 90 days.		X		MHTC	8/4/2010
MHTC MERT Census Detail	MHTC		Provides a detailed report on currently open MERT clients		X		MHTC	3/10/2010
MHTC MERT Discharge Summary	MHTC		Provides a report on discharged clients within a date range		X		MHTC	2/25/2010
MHTC MERT Monthly Summary	MHTC		Provides a month snapshot of MERT admits broken down by shift, with shift totals by day and month.		X		MHTC	2/25/2010
MHTC NEW Census	MHTC		Provides Real Time Census Information for the Mental Health Treatment Center. Report provides option of alphabetic sort by patient name or sort by room number.		X		MHTC	3/30/2011

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MHTC Open Crisis Services LOS	MHTC		Provides real time length of stay for the crisis program at MHTC (current admissions). Includes adjusted number of minutes/hours based on leave data entered. This report can be utilized to determine number of billable crisis units as well as monitoring the length of time a client is open to the crisis program.		X		MHTC	6/30/2009
MHTC Provider Census by Date	MHTC		Same as above, but can be run for a chosen date range	X			MHTC	11/12/2009
MHTC Quick Census	MHTC		Provides current census information for the inpatient program at the MHTC. Shows Room, Bed and Treatment Team information.		X		MHTC	7/30/2010
Unit Verification Report	MHTC		Displays verification information for the MHTC worklist functionality. Includes dates verified/not verified as well as the user, time and date of verification. This will be used in verifying/compiling/posting the worklist.				MHTC	Go-Live
Active MediCal Roster	Obsolete		Returns a list of All Active clients with their CIN numbers if applicable, and flags CINS which are formatted incorrectly	X				8/6/2010
Child and Family Slots Report	Obsolete		Report of slots with totals for Child "staff" records				Child Access	7/31/2009
Client Ledger (835)	Obsolete		Client level ledger which will show all services (open, claimed, denied, etc.) for a client with relevant PCCNs where applicable. Not as efficient as the individual PCCN reports and does not include denial reasons.	X		X		4/6/2010
Duplicate Services Report	Obsolete		Provides a list of possible duplicate services within a date range. This is based on exact duplication, and is not comparable to the DHCS version above.	X	X	X		2/22/2010
Financial Eligibility Summary	Obsolete		Provides a graphical chart view showing guarantor coverage by month for an individual client.	X	X	X		2/18/2010
PCCN for Approvals by Client	Obsolete		Post Claiming Report, for a specific client will provide the PCCN for approved services. This is only available AFTER we receive a response from the state. See now "Phase II Client Charge Status"	x		X		7/29/2010
PCCN for Denials by Client	Obsolete		Post Claiming Report, for a specific client will provide the PCCN for denied services with denial reasons. This is only available AFTER we receive a response from the state. See now "Phase II Client Charge Status"	X		X		7/29/2010
Phase II Denials by Posting	Obsolete		Post claiming/Post state response. Reports denied DMH services by the date the denial was entered in Avatar with the reasons. Use to work replacements/corrections for resubmission where possible. See now "Phase II Program Charge Status"	X	X			11/18/2010
Phase II Denials by Posting (Excel)	Obsolete		Same as above, but formatted for ease of export to Excel, which allows for sorting by denial codes, etc. See now "Phase II Program Charge Status"	X		X		1/25/2011
Phase II Denials by Posting (Rebill)	Obsolete		This is the old version of the Phase II report. It relies on the posting tables, and thus is very slow. It can contain some pending 835 information on it, and is still viable as far as the information it contains, but for practical use, it has been supplanted by the "Phase II Program Charge Status" for MH and "Phase II Denials by Posting Date" for ADS	X		X		1/21/2011
Phase II Denials by Service	Obsolete		This is the same data as above, but by date of service. Less valuable as a cleanup tool, more useful for looking at denials for specific timeframes. See now "Phase II Program Charge Status"	X	X			11/19/2010
Phase II Denials by Service Summary	Obsolete		Summary tables for Phase II Denials by Service.	X	X			12/3/2010

