Reports Crosswalk: CCBH to SmartCare Reports (Incomplete List)

SmartCare has robust reporting functionality that exceeds that of CCBH and SanWITS. Reports will look different from the reports users currently receive from the legacy systems, but almost every field in SmartCare is 'reportable'. Users will be able to create and 'favorite' their own reports, allowing for more flexibility, ease of use, and more timely access. See the reports documentation on the CalMHSA website for more information: https://2023.calmhsa.org/reports-2/

The table below is an incomplete crosswalk of CCBH reports to potential SmartCare reports. Additional work is underway to provide more detailed information on report availability and will be shared with the System of Care as soon as available.

Type of Report in SmartCare: CAN = A Canned Report in SmartCare that answers the same questions as in the CCBH report, SSRS = An SSRS or Ad hoc report can be created in the future (most data elements are there but not in an existing Canned Report), Gap = A major data element was missing, so there is a likely a gap in reporting

	Report Category or Main Report Name	Report Name or Template Name	Report Description and/or Key Variables	Type of Report in SmartCare*	SmartCare Canned Report Name
1	Access to Services Journal Report	Access to Services Journal Report	Timely access to service program	CAN	*Unknown or N/A*
2	Assessment and Treatment Plan Listing	Assessments Final Approved by Primary Signer	Final approval status	Gap	Daily Progress Note
3	Assessment Treatment plans reports	Client Plans Not Final Approved	*Unknown or N/A*	CAN/SSRS	LOC Assessment and Client Plans Review
4	Assessments/ Treatment Plans Report	Assessments and Client Plans Not Final Approved	Non-final approved assessment	CAN	LOC Assessment and Client Plans Review
5	California County of Responsibility / Aid Codes Report	California County of Responsibility / Aid Codes Report	Outside of county clients served	Gap	CalOMS Outside Provider Client Tracking List Page
6	California MMEF Report	California MMEF Report	MMEF Eligibility	CAN	MMEF Eligibility Records
7	Client Assignments Report (Landscape)	Client Assignments Report (Landscape)	Number of Assignments	CAN	Program Assignments
8	Client Assignments Report (Landscape)	Caseload Roster by Subunit and Server	staff caseload	CAN	Staff Caseload with Address and Phone Number (My Office)
9	Client Assignments Report (Landscape)	Caseload Roster by Subunit and Server	address report	CAN	Staff Caseload with Address and Phone Number (My Office)

	Report Category or Main Report Name	Report Name or Template Name	Report Description and/or Key Variables	Type of Report in SmartCare*	SmartCare Canned Report Name
10	Client Diagnosis Reports	Client all diagnosis report	Clients with inactive diagnosis codes	CAN	Clients with Invalid DSM-IV TR Current diagnosis/Service diagnosis errors
11	Client Insurance Eligibility Report	Client Insurance Eligibility Report	Insurance Eligibility	CAN	Client Insurance and Date Span Report
12	Client Medications Listing	Unknown or N/A	Program	CAN	Client Medications by Program, Medication List (Client)
13	Client Roster Report	Address Report	Client's address and phone number	CAN	Unknown or N/A
14	Client Roster Report	Admissions Morning Report	Number of daily addmissions	CAN	Unknown or N/A
15	Client Roster Report	Client Assignment Tracking Report	Track Client Assignments	CAN	Client Activity Tracker
16	Client Roster Report	Client Roster Report	primary diagnosis, admit, open, close date	CAN/SSRS	CalMHSA MCP member service data report
17	Client Services Listing	Client Services Listing	Unknown or N/A	CAN/SSRS	CalMHSA Field Services Report/ Total Client Services/Service Report Excel
18	Client Services Report	998 Client Progress Note Audit Report	Pending void and reentry of service	Unknown or N/A	Unknown or N/A
19	Client Services Report	Bed Days Service By Unit And SubUnit (24 Hour Programs)	Bed utilization by program	Gap	Hospitalization Length Of Stay Report
20	Client Services Report	Client Services Report	Unknown or N/A	CAN/SSRS	CalMHSA Field Services Report/ Total Client Services/Service Report Excel
21	Client Services Report	Face to face time only report	last f2f service client had	SSRS	Unknown or N/A
22	Client Services Report	Program Monitoring by Staff Report	staff billing hours monitoring	CAN/SSRS	CalMHSA 200 Staff Dashboard Report
23	Client Services Reports	Open Clients with no Services	open clients with no services	SSRS/GAP	CalMHSA Open enrollment and last service date report
24	Clients Assignments Report	Caseload Roster by Subunit and Server	clients over 60	CAN	Clients Served by Program and Age(Smartcare)
25	Diagnosis code listing	Diagnosis Code Listing	Unknown or N/A	CAN	ICD9 to ICD10 diagnosis mapping
26	Discharge Report	Unknown or N/A	Programs, Status, Program Managers, Clinicians, Dates	CAN	Program Assignments, Discharge Report

	Report Category or Main Report Name	Report Name or Template Name	Report Description and/or Key Variables	Type of Report in SmartCare*	SmartCare Canned Report Name
27	Final Approved Progress Notes Over 3 Days from Service Date	Unknown or N/A	Unknown or N/A	CAN	CalMHSA Progress Note Timeliness Report
28	Final Approved Progress Notes Summary Report	Unknown or N/A	Unknown or N/A	CAN	CalMHSA Progress Note Timeliness Report
29	Length Of Stay Report	Length Of Stay Report	Unknown or N/A	CAN	Hospitalization Length of Stay
30	Master Roster Case Management	Desk Roster	active staff info	CAN	CalMHSA Credentialing (Excel) Report
31	Monthly and Weekly Caseload Tracking Log	Caseload Tracking Log	referrals received by program	CAN	CalMHSA 101 Inquiry Referrals Report/CalMHSA BHQIP ED Referrals Report/CalMHSA BHQIP MCP Referrals Report
32	Morning Reports	Admission Morning Report	clients receiving services at hospitals, crisis house, IMD/SNF, Jail, etc	CAN/SSRS	Open enrollment and last service date
33	Print Appointment Sheets	Appointment Sheets by Staff and Date	Appointments by Office	CAN	Appointment Search
34	Productivity Report	Productivity by Service Code and Server	Unknown or N/A	CAN/SSRS	Productivity Details Report/ Staff Service Detail
35	Progress Notes Report	Unknown or N/A	Unknown or N/A	CAN	Progress Notes with required elements reporting
36	Progress Notes Report	Non-Final approved progress notes report	Non-final approved notes	CAN	Progress Notes with required elements reporting/CalMHSA Progress Note Timeliness Report
37	Server Credentials Report	Server Credentials Report	Unknown or N/A	CAN	CalMHSA Staff Licenses Report
38	Staff listing (Clinical)	Unknown or N/A	Staff	CAN	Staff Roles and Permissions (2)
39	Staff listing (Security)	Unknown or N/A	Staff	CAN	Staff Roles and Permissions (2)
40	Staff(Listing)	Staff(Listing)	Active staff list with roles	CAN	CalMSHA User Role Report