



IMPERIAL COUNTY  
**Behavioral Health Services**  
MENTAL HEALTH & SUBSTANCE USE RECOVERY

---

## Report Catalog- User Guide

---

<b>Date Created:</b>
08/18/2022
Vanessa T. Lopez

## **Report Catalog- User Guide**

The Report Catalog is a virtual repository that contains the forms and reports located in myAvatar. This repository contains forms and reports that have been created to retrieve specific data within the electronic health record. It includes a historical record of changes made by specific person for each form/report. It provides a brief summary describing the purpose of the form/report along with its required parameters. Included, is also the namespace or separate modules of Practice Management (PM) or Clinical Work Space (CWS) that hosts a collection of data. The report catalog also identifies the tables in which data is obtained from. Please note forms and reports are available based on assigned user roles.

### **Purpose:**

This document serves as a user guide on how to navigate the [Report Catalog](#) upon accessing the Notion link below.

<https://www.notion.so/icbhs/Report-Catalog-b1a154f3d9384e849c5fbfa94caa9634>

### **Definitions:**

Form: A system based version of a paper form. It includes fillable fields to capture information and submit electronically.

Modeled: Reports created by ICBHS- Information Systems

Namespace: The modules of either Practice Management (PM) or Clinical Work Space (CWS) that hosts a collection of tables with respective data.

Parameters: A set of conditions required to enter prior to run a report.

Report: Data collection document based on the requested information in an organized format for specific purpose.

Tables: System location where data is stored in a database. It consists of columns and rows.

Tags: Key words or possible categorization for form/report. Core refers to forms/reports that were developed by Netsmart.

Type: Form or Report

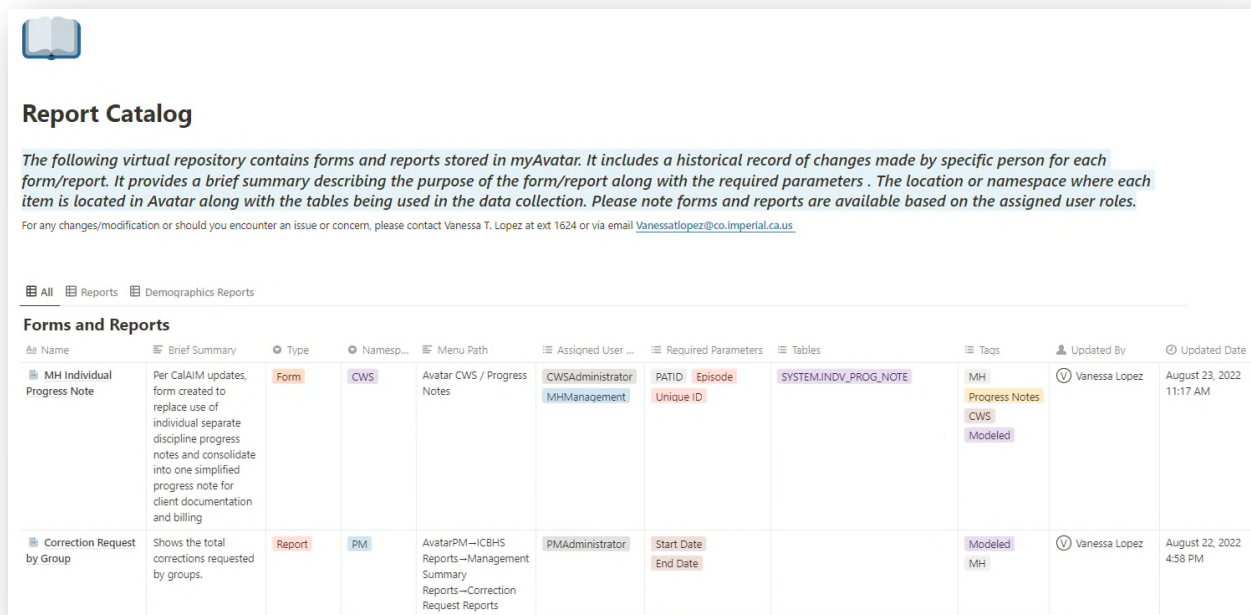
# How to navigate the website.

## Step 1: Accessing the website

Please select the link below:

<https://www.notion.so/icbhs/Report-Catalog-b1a154f3d9384e849c5fbfa94caa9634>

A new window will open up on your web-browser displaying the list of the forms and reports contained in this repository.



**Report Catalog**

The following virtual repository contains forms and reports stored in myAvatar. It includes a historical record of changes made by specific person for each form/report. It provides a brief summary describing the purpose of the form/report along with the required parameters. The location or namespace where each item is located in Avatar along with the tables being used in the data collection. Please note forms and reports are available based on the assigned user roles.

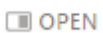
For any changes/modification or should you encounter an issue or concern, please contact Vanessa T. Lopez at ext 1624 or via email [Vanessatlopez@co.imperial.ca.us](mailto:Vanessatlopez@co.imperial.ca.us)

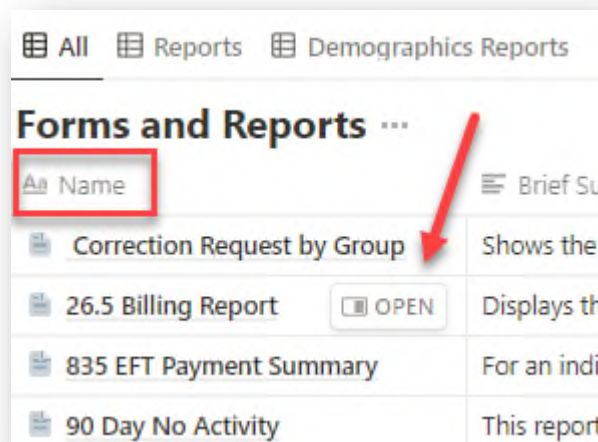
All Reports Demographics Reports

### Forms and Reports

Name	Brief Summary	Type	Namesp...	Menu Path	Assigned User ...	Required Parameters	Tables	Tags	Updated By	Updated Date
MH Individual Progress Note	Per CalAIM updates, form created to replace use of individual separate discipline progress notes and consolidate into one simplified progress note for client documentation and billing	Form	CWS	Avatar CWS / Progress Notes	CWSAdministrator MHManagement	PATID Episode Unique ID	SYSTEM.INDV_PROG_NOTE	MH Progress Notes CWS Modeled	Vanessa Lopez	August 23, 2022 11:17 AM
Correction Request by Group	Shows the total corrections requested by groups.	Report	PM	AvatarPM--ICBHS Reports--Management Summary Reports--Correction Request Reports	PMAdministrator	Start Date End Date		Modeled MH	Vanessa Lopez	August 22, 2022 4:58 PM

## Step 2: To Open Form/Report details

Under the Name column, select the form/report to open and click the  icon.

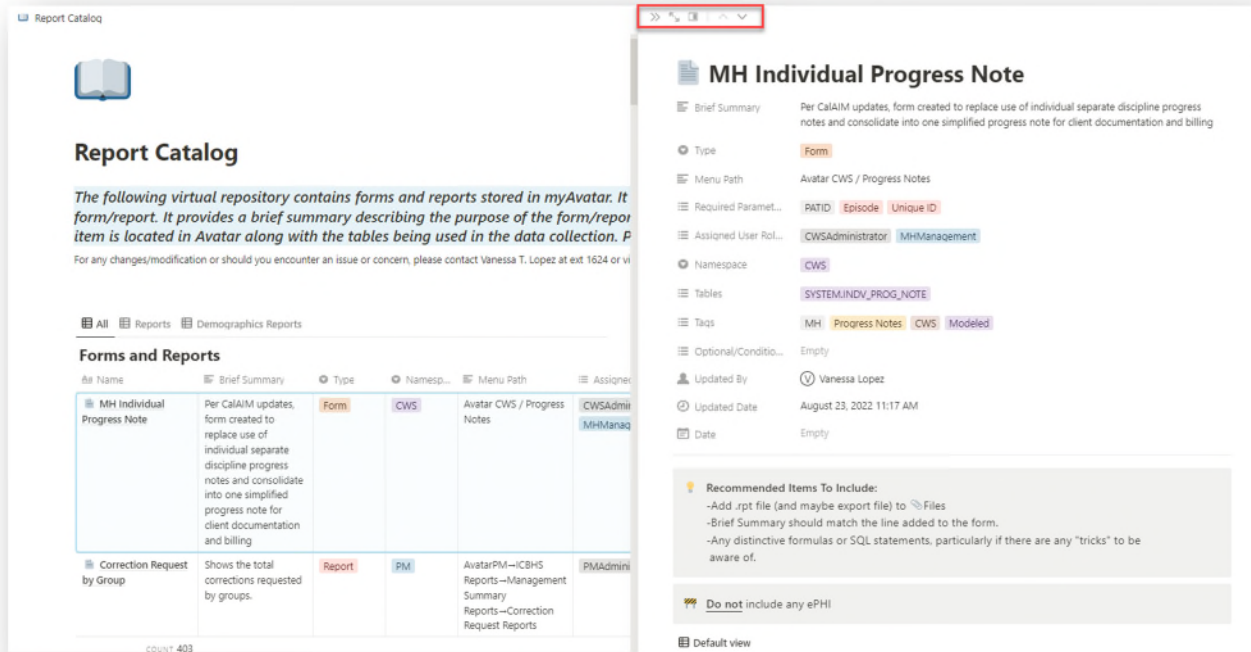


All Reports Demographics Reports

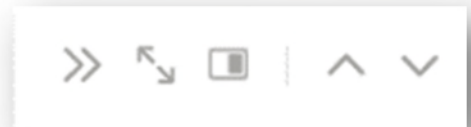
### Forms and Reports ...

Name	Brief Summary
Correction Request by Group	Shows the t
26.5 Billing Report	Displays the
835 EFT Payment Summary	For an indiv
90 Day No Activity	This report

Side window will display Form or report selected. This will display detailed information about the form/report.



Additional navigating options appear on top of the report.



»» To Close report

↗ Full page view

☐ Switch peek mode

⏪ Previous page

⏩ Next page

### Step 3: Filtering, Sorting and Searching.

Notion gives you the ability to sort, filter and search the information contained in the Data Catalog. Menu is located at the right top section of the table.

**Report Catalog**

The following virtual repository contains forms and reports stored in myAvatar. It includes a historical record of changes made by specific person for each form/report. It provides a brief summary describing the purpose of the form/report along with the required parameters. The location or namespace where each item is located in Avatar along with the tables being used in the data collection. Please note forms and reports are available based on the assigned user roles.

For any changes/modification or should you encounter an issue or concern, please contact Vanessa T. Lopez at ext. 1624 or via email [Vanessatlopez@co.imperial.ca.us](mailto:Vanessatlopez@co.imperial.ca.us)

All Reports Demographics Reports Filter Sort 🔍 ↻

Name	Brief Summary	Type	Namesp...	Menu Path	Assigned User ...	Required Parameters	Tables	Tags	Updated By	Updated Date
MH Individual Progress Note	Per CalAIM updates, form created to replace use of individual separate discipline progress notes and consolidate into one simplified progress note for client documentation and billing	Form	CWS	Avatar CWS / Progress Notes	CWSAdministrator MHManagement	PATID Episode Unique ID	SYSTEM.INDV_PROG_NOTE	MH Progress Notes CWS Modeled	Vanessa Lopez	August 23, 2022 11:17 AM
Correction Request by Group	Shows the total corrections requested by groups.	Report	PM	AvatarPM—ICBHS Reports—Management Summary Reports—Correction Request Reports	PMAAdministrator	Start Date End Date		Modeled MH	Vanessa Lopez	August 22, 2022 4:58 PM

#### Filtering:

Click on “Filter”

A drop down list will appear displaying all columns available to filter.

Select the column you would like to apply this filter.

Filter Sort 🔍 ↻

Filter by...

- Name
- Tags
- Assigned User Roles

A new text box will display.

Enter a key word you would like to use to apply to this filter.

**Forms and Reports ...**

Name: Access + Add filter

Name contains

Access MDAP Alert

Notion will automatically display all the forms that contain the key word. To clear the filter, click the reset option at the top right side of the report.

**Forms and Reports ...**

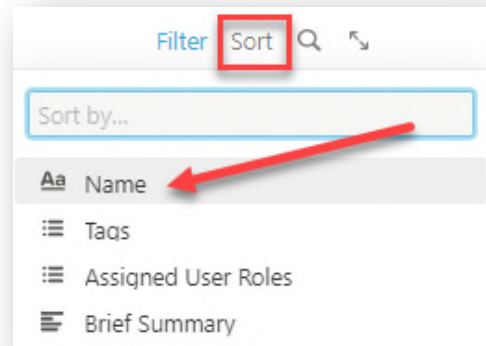
Name: Access + Add filter Reset

Name	Brief Summary	Namesp...	Type	Assigned User Roles	Tags	Tables	Menu Path	Required Pa	
Access and Eligibility UMDAP Alert	Reports flags clients whc	PM	Report	PMAAdministrator	Access	Client	SYSTEM.view	AvatarPM—ICBHS Reports—Ac	Program Selec
Access Log Interpreter	This report provides a cr	PM	Report	Access	FiscalSupervisor	C	Access	Avatar PM / ICBHS Reports / Q	Start Date
Access Log Override to Draft Audit	This report logs all Acce	PM	Report	PMAAdministrator	Access	ACCESS.LOG	Avatar PM / ICBHS Reports / AI	Start Date	E

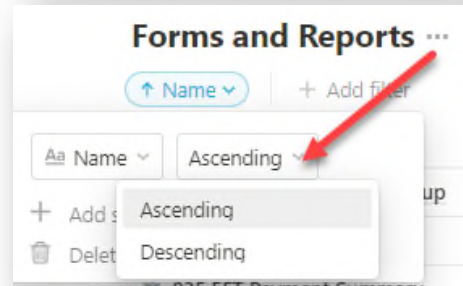
## Sorting:

Click on “Sort”

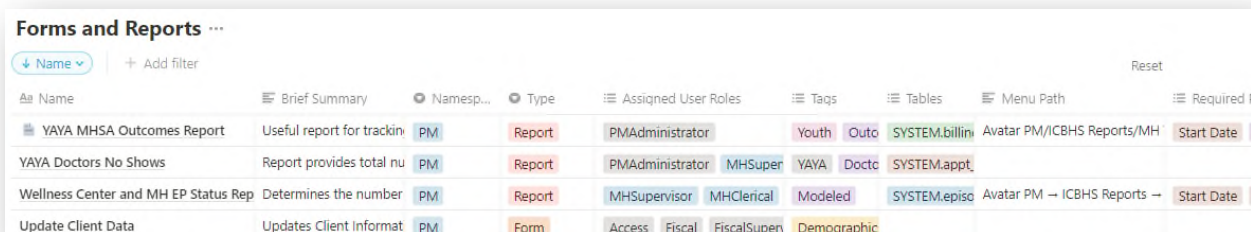
A drop down list will appear displaying all columns available to sort.  
Select the column you would like to sort.



A new text box will display.  
Click on the drop down menu to select Ascending or Descending option.

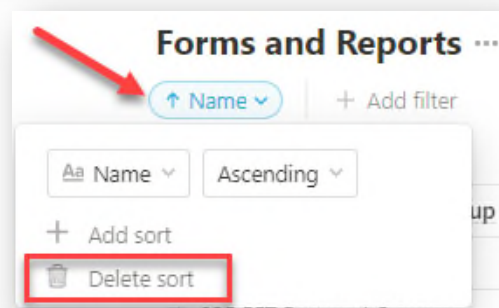


Notion will populate the data in the sorting option selected.

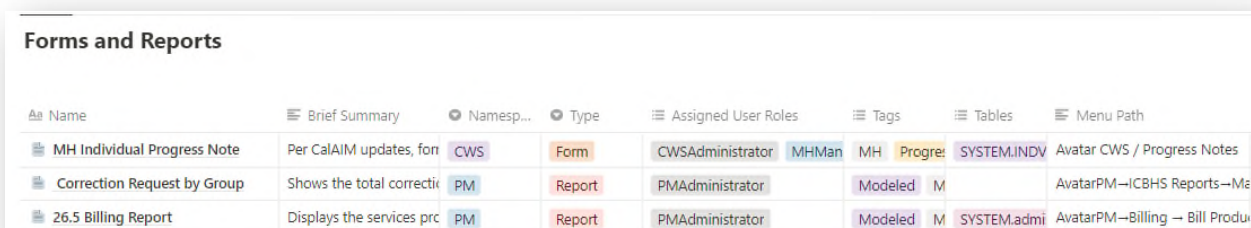


Name	Brief Summary	Namesp...	Type	Assigned User Roles	Tags	Tables	Menu Path	Required P
YAYA MHSA Outcomes Report	Useful report for trackin	PM	Report	PMAdministrator	Youth Outo	SYSTEM.billin	Avatar PM/ICBHS Reports/MH	Start Date
YAYA Doctors No Shows	Report provides total nu	PM	Report	PMAdministrator MHSuper	YAYA Docto	SYSTEM.appt		
Wellness Center and MH EP Status Rep	Determines the number	PM	Report	MHSupervisor MHClerical	Modeled	SYSTEM.episo	Avatar PM → ICBHS Reports →	Start Date
Update Client Data	Updates Client Informat	PM	Form	Access Fiscal FiscalSupen	Demographic			

To remove the sorting selection, click on Delete sort.




Data will be set back to its default view.



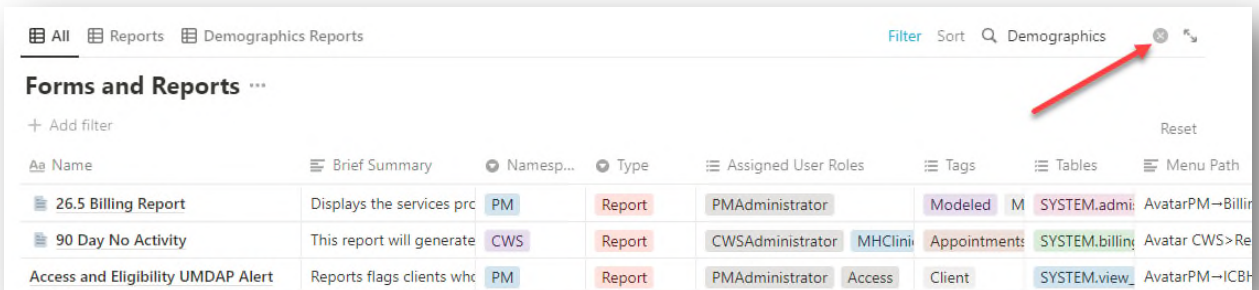
Name	Brief Summary	Namesp...	Type	Assigned User Roles	Tags	Tables	Menu Path	Required P
MH Individual Progress Note	Per CalAIM updates, for	CWS	Form	CWSAdministrator MHMan	MH Progre	SYSTEM.INDV	Avatar CWS / Progress Notes	
Correction Request by Group	Shows the total correcti	PM	Report	PMAdministrator	Modeled M		AvatarPM→ICBHS Reports→Me	
26.5 Billing Report	Displays the services prc	PM	Report	PMAdministrator	Modeled M	SYSTEM.admi	AvatarPM→Billing → Bill Produ	

### Searching:

Click on the search icon  located in the top right and type in key word to search information.



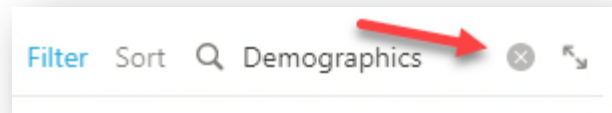
Notion will populate data displaying all records that contains the search word.



The screenshot shows a data table titled "Forms and Reports" with a search filter applied. The search bar at the top right contains "Demographics" and has a red arrow pointing to the search icon. The table has several columns: Name, Brief Summary, Namespace, Type, Assigned User Roles, Tags, Tables, and Menu Path. The search results are as follows:

Name	Brief Summary	Namespace	Type	Assigned User Roles	Tags	Tables	Menu Path	
26.5 Billing Report	Displays the services prc	PM	Report	PMAadministrator	Modeled	M SYSTEM.admi	AvatarPM-Billir	
90 Day No Activity	This report will generate	CWS	Report	CWSAdministrator	MHCLini	Appointments	SYSTEM.billing	Avatar CWS>Re
Access and Eligibility UMDAP Alert	Reports flags clients whc	PM	Report	PMAadministrator	Access	Client	SYSTEM.view	AvatarPM-ICBH

To remove the search, click on icon next to the searching box.



Data will be set back to its default view.

