Standard Reports Catalog

Report	Description
Client Activity, Information and Demographics	
Active Client List by Clinician	For each clinician, displays two totals: Active Clients and Active Clients with a Visit within range and program parameters. Drill-through fields displayed: Client, MRN, Gender, DOB, Encounter Number, LOS, Program, Admit Date, Discharge Date, Discharge Reason, Visit in Period, and Most Recent Visit.
Active Client List by Program	For each program, displays a count of Active Clients and the number of times they were seen within range, including type of encounter, number of active issues, progress notes and claims.
ADT Activity Report	Lists enrolled clients within range and groups them as New Admissions, Discharges, or Active Clients. A summary table provides the count of each category. Provides Name, MRN, Encounter, Program, Age at admission, and Admit Date. Does not provide unique clients.
ADT Length of Stay	For residential/inpatient bed programs. Provides total length of stay by selected program, listing all clients, their admission and discharge dates, and length of stay. Also indicates if clients were active within given range.
ADT Waitlist by Program	Summary and tallies of waitlist related statistics by program.
Bed Management Report	For residential/inpatient bed programs. Provides summary statistics including number of admissions, total number of unique clients, total resident days and total bed days. On a per client basis, the report shows the arrival and departure date and time for each bed.
Census Report	Comprehensive list of clients who were active in the organization within range. Also provides a count of unique clients in the organization.
Group Programming Attendance	Provides a breakdown of group attendance, including type of group, attendances, no shows, and cancellations.
Registration – Address Labels	Displays client address labels.
Registration – Care Team Assignment	Summarizes all non-archived care team assignments for all clients that are active within range (based on the dates of their Case Open encounter). Drill-through fields displayed: Client, MRN, Gender, Encounter Program, Start Date, LOS, and total number of clients on page.

Report	Description
Referral Summary Report	Summarizes referral data totals by Program for given date range, with a drill through providing detailed referral information for each client including referral source, referral status, and wait times.
Registration – Pre-Admit Client List	Listing of all clients with an encounter with the status of “Pre-Admit”.
Registration Scheduling Report	Provides information on client visits to track attendance.
Clinical Documentation	
IPCC Domains by Program	For the program selected, displays the breakdown of IPCC (Care Plan) Issues by domain, lists the number of clients with an issue in the domain, as well as the number of Issues and Interventions.
IPCC Source & Deficiency	By program, shows the percentage of issues that fed the Care Plan and whether interventions have been put in place. Drill-through allows user to see a client’s care plan items that are missing interventions.
Productivity and Audit	
Assessments - Incomplete Assessments	Real-time list of all assessments for an organization that are in a saved (non-submitted) state.
CDS/OCAN Proofing Report	Compiles required CDS-MH/OCAN data for review and proofing purposes, prior to submission.
Clinical Documentation in the past 30 days	Tracks documentation done in the last 30 days, as well listing clients with no documentation.
Lockbox Break Audit Report-	Displays all Lockbox break activities, including justification, time and duration, and what was viewed during the session.
Notifications Task Summary by Assignment	By user, breaks down number of assigned tasks and status of those tasks.
Progress Notes - Encounter Documentation by User	Displays number of encounters and number of progress notes by clinician and provides details of encounters without a progress note.

Report	Description
Progress Notes Staff Log	By clinician listing of Progress Notes completed within range based on the clinician who signed the note. Drill-through allows user to get details on completed notes.
Progress Notes Staff Log for Finance	Similar to the Progress Notes Staff Log; however, skips the 'by-clinician' listing of Progress Note completion, and instead simply lists all Progress Notes that have an Interaction Start Date falling within range.
User Audit Activity Report (Admin)	Displays all user activity within range. Can also select by Client ID number to display all audit activity associated with a specific client.
Workload Proofing Report by Clinician	Displays workload for all clinicians for a selected range. The report is grouped by clinician and enables staff to assess the number and types of encounters for a given day as well as the time spent on those encounters.
Workload Proofing by Program	Similar to the Workload Proofing Report by Clinician; provides a breakdown by program/site and then clinician.
Medication Reports	
Full Medication History	Lists a client's entire medication history within range.
Medication Activity Record	By client list of entire medication activity history within range. Often requested for court-ordered compliance.
Medication Renewal	Lists all clients with a prescription renewal due within range.
Next Administration Due Report	Lists all clients have that administrations due within range.
Finance *(Validity of reports will depend on agency's configuration for billing/financial data)*	
Active Client by Funder	Lists active clients receiving services associated with a grant program/funder within range.
Aging Report	Provides age of outstanding claims. User can drill-through to view list of outstanding claims by organizations, by age grouping, by client, etc.

Report	Description
Authorization Code Report	Lists enrolled clients without an authorization code, new authorization codes that have been applied, expired or expiring authorization codes, and clients discharged within range. Listing includes client information as well as insurance and policy numbers where applicable.
Billing Claim Summary Report	Lists all claims as per the parameters selected. Includes filters to run report by range, program/location, sequence ID, claim status, client MRN, and Claim ID.
Billing Eligibility Report	Provides high-level eligibility data, as an alternative to the alerts and the existing detailed client-by-client data that is available in the eligibility module.
Cash Report	Lists all remittances that occurred within range.
Claims - Invoice Statements	Prints invoice statement to be given to a patient/client for payments due. May require additional fees.
Claims Submission Detail Report	Primarily a financial reporting tool designed for billers and managers to review claims and batches submitted for remuneration. Contains a summary of claims activity within range (claims sent, rejected, denied and resubmitted) as well as dollar amounts and pay codes. *U.S. customers only.*
Performance - Productivity Report	Summary of clinician productivity based on client visit and workload data.
Performance - Profitability Report	Displays relationship between amount of work done (utilization), amount claimed, amount of received payment, and entity responsible for outstanding amount.
Procedure Activity Report	Displays all activity within range associated with services that are funded by a grant/funder. Generic report meant to support grant/funder reporting requirements.
Regulatory Submissions	
CDS Submission Report	Compiles required CDS-MH data from OCAN and CDS assessments for submission purposes. This report can be exported in ASCII format for upload.
MIS Statistics	Comprehensive list of statistics related to referrals, waitlist, admissions and visits for MIS reporting purposes.
OCAN *(requires deployment of OCAN Assessment)*	

Report	Description
Comparison of Needs to Baseline	Compares baseline assessment scores for all clients within a program to the follow-up assessments. Offers an overall view of how clients' needs are being addressed through services within selected programs.
Individual Needs Over Time	Displays changes over time in a specific need rating for an individual client. Line graphs compare client versus clinician rating.
Needs Over Time (Consumer and Self)	Similar to Individual Needs over Time, but without graphs. This report also shows met needs, unmet needs, and no needs in each domain.
Summary of Actions and Comments	Lists all action and comment sections for the client assessment within range.
Metabolic *(requires deployment of Metabolic Health Monitor Assessment)*	
Metabolic Diabetes	Population summary report of clients in a program or organization with diabetes.
Metabolic Raw Data Comparison Report	Compares raw data from the metabolic assessment over time for a given client.
Metabolic Scoring Comparison Report	Compares scoring results from the metabolic assessment over time for a given client.
Metabolic Syndrome Report	Population summary report of clients in a program or organization with metabolic syndrome.
Obesity Report	Population summary report of clients in a program or organization with clinical obesity.
interRAI CHA *(requires deployment of interRAI CHA assessment)*	
Assessor Report #1: Client's CAPs and Outcomes	Provides triggered CAPs, Outcome Measures & Scales for one client. Informal support status and hospital/physician utilization is also shown.
Assessor Report #2: Client Progression Report	Provides CAPs, Outcome Measures & Scales for one client over time. Always shows initial assessment as baseline. Additionally, the informal support status and hospital/physician utilization is shown.

Report	Description
Assessor Report #3: Client Assessment Summary Report	Quick summary of a single client. The information from Core CHA & Functional/MH Supplements are shown, along with Outcome Measures & Scales, description, and scores. The informal support status and hospital/physician utilization is also shown.
Organizational (HSP) Report #1: Clinical Report	This report provides a summary of an organization based on CAPs, Outcome Measures & Scales on a particular day of all current assessments for all active clients. Also provides the client count for each CAP, Outcome Measures & Scales.
Organizational (HSP) Report #2: Clinical Report	Overview of all active clients. The report can download information for further analysis and be generated by Domains, Date Rate or Monthly selections.
Organizational (HSP) Report #3: Operational Report	Provides overview of workload of assessors and status of completing assessments. The reports can be searched by Date Range and or Monthly Options.
RAI-MH *(requires deployment of RAI-MH assessment)*	
RAI-MH Assessment Summary	Summary of client assessments within range, showing assessment date and type, LOS, and SCIPP information.
RAI-MH Data Audit	Information around quality indicators of pain management, restraint, and close observation.
RAI-MH Discharge	Identifies all clients discharged within range, with LOS and other discharge information. Also identifies incomplete discharge assessments.
RAI-MH SCIPP Weighted Patient Days	Identifies total patient days, average CMI, and total SWPD, as well as a breakdown of SWPD for each client.
RAI-MH Scale Summary (Admission - Discharge)	Displays average scores for the chosen scale(s) at admission and discharge.
NRS *(requires deployment of NRS assessment)*	
NRS - Assessments Completed	Provides number of completed NRS assessments, broken down by visit type.
NRS - Incomplete Assessments	Lists details for clients whose NRS assessments are in an incomplete state.

Report	Description
NRS - Report 1: RCG (Rehabilitation Client Group)	Detailed list of all NRS clients who were discharged within range and have completed Admission and Discharge assessments. Provides information on socio-demographics, health characteristics, accessibility, outcomes and efficiency.
NRS - Report 2: Admission Profile	Profile of the following admission indicators: Referral Source, Rehabilitation Client Group, Age, Sex, and Admission Class.
NRS Schedule Report	Indicates when a specific assessment is due.
NRS Weighted Cases Report	Displays the NRS Weighted Cases Total/Average per fiscal year.
CCRS *(requires deployment of CCRS assessment)*	
CCRS - Assessment Summary	Lists all completed CCRS assessments within range including clients, LOS, assessment date and RUG group.
CCRS - Days of Intervention	Displays days and minutes for selected therapies performed.
CCRS - Discharge Review	Displays discharges and missing discharges, as well as type of discharge and discharge destination, within range.
CCRS - Next Assessment Report	Displays due dates for upcoming assessments and identifies overdue assessments.
CCRS - Patients without Assessments	Identifies all encounters which have no corresponding admission, discharge, quarterly or annual assessments.
CCRS - Rehabilitation Category Summary	Displays assessments organized by Rehabilitation Category within range.
CCRS - RUG Assessments	Displays assessments for RUG III group(s) within range.
CCRS - RUG III Classification	Displays number of assessments organized by RUG III group within range.
CCRS - RUG Weighted Patient Days	Calculates the RWPD for each client within range.

Report	Description
CCRS - Skin Ulcer	Shows skin ulcer information for assessments and previous assessment.
CCRS - Verify Key	Shows audit information for assessments.