List Pages and Reports

This Tip Sheet will walk users through how to use List Pages and Reports. This Tip Sheet may change as our trainings and systems are updated. Please visit our website https://dhs.saccounty.gov/BHS/Avatar/Pages/Avatar.aspx for the most updated version. If any additional help is needed you can contact us at Avatar@saccounty.net.

List Pages information

List pages provide a way to view information in a list format. You can filter the information and create custom sorts that you can use later. You are also able to click on links on the page to open additional pages of information.

Search for a List page

When searching for an item list Pages may be labeled with an "S" next to the name of the item.
 Items marked with "R" are for traditional style reports.



List Page Layout

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AT Activity Tracker									_						
AS Andre's Test	Recorded By All All Programs	✓ Ass ✓ Alli	-	All Dispositions All Urgency Level	 ✓ All St ✓ All Co 		All Inquiry Type All Priority Populati	Apply	Filter		🛑 1. Filt	ters to sort	data		
AR ANSA Reporting List Page	From 01/01/1900	tir to t	12/31/9999 🛗 🕶	Last Name	First	Name	Phone			-					
ASAM Reporting List Page	Client (Potential)	Client Id	Start Date/Time N	Recorded By	Assigned To	Disposition	Inquiry Status	Program Name	Location	Phone	Inquiry Type	Urgency Level	Contact Type	Priority Population	End Date/Time
9.0	Test, Adam		2117/2023 11:56 4	an Buthler, Kristina											*
0 Disaleus d data	Test, Bob	1145	2/10/2023 1:15 PM	M Ibarra No.	3.	Link to oper	n additional in	formation				Not urgent	Face to Face		2/10/2023 1:20
a 2. Displayed data	Test, Larry	1143	2/10/2020 12:02 P	M Ibarra, Melony			In Progress					Not urgent	Face to Face		
	Test, Child	1141	2/10/2023 10:30 A	AM Ibarra, Melony			In Progress					Not urgent	Call		
9 C	Test, Ryan	1134	1/31/2023 4:10 PM	M Owens, Shalina			In Progress					Not urgent	Face to Face		
A Client Activity Tracker	Test, Lady	1125	1/27/2023 3:25 PM	M Ibarra, Melony	Ibarra, Melony		In Progress	Access Unit		(916) 477-7777	Request for serv	Not urgent	Call	No special populatio	1/27/2023 3:27
	Test, Michael	1126	1/27/2023 1:17 PM	M Duthler, Kristina			In Progress					Urgent	Call		1/27/2023 1:18
Client Clinical Problems	Test, Michael	1126	1/25/2023 11:23 A	AM Duthler, Kristina	Ibarra, Melony		In Progress	Access Unit	Office			Not urgent	Call		
	Test, Michael		1/25/2023 10:42 A	AM Duthler, Kristina			Complete					Urgent	Call		
D Clinical Data Access Groups	Test Michael		1/2E/2023 10-38 A	M Duthler Kristine			In Products					Urdent	Call		

1. Sorting Data on the List Page

- You can select 1 or more filters. Once you have selected all of the filters click "Apply filter"
- Then the page will only display the data that was filtered.

Recorded By All	~	Assigned To All	~	All Dispositions	~	All Status	~	All Inquiry Type	~	Apply Filter		
All Programs	~	All Locations	~	All Urgency Level	~	All Contact Type	~	All Priority Population	~			
From 02/01/2023	iii -	To 02/16/2023 🛗 🕶		Last Name		First Name		Phone				
Client (Potential)	Client	Id Contact Type	L	Jrgency Level	Inquirer	Start	Date/Time 1		Assig	ned To	Disposition	Inquiry Sta
Client (Potential) Test, Bob	Client 1145	Id Contact Type		Jrgency Level ot urgent	Inquirer Test, Bob		Date/Time 1		Assig	ned To	Disposition	Inquiry Sta Complete
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2. Displayed information

- The list page will contain information that is sortable and may have clickable links. This information is affected by the filters above.
- The information is laid out similar to a spreadsheet.

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a Activity Tracker															
AS Andre's Test	Recorded By All	✓ Assig		All Dispositions	✓ All State		 All Inquiry Type 	✓ Apply F	Iter						
ANSA Reporting List Page	All Programs From 01/01/1900	 ✓ All Lo 	2/31/9999 🛗 🕶	All Urgency Level	All Cont First Na		All Priority Population Phone	n v							
ASAM Reporting List Page	Client (Potential)	Client Id	Start Date/Time ▽	Recorded By	Assigned To	Disposition	Inquiry Status	Program Name	Location	Phone	Inquiry Type	Urgency Level	Contact Type	Priority Population	End Date/Time
R CalOMS Report Summary	Test, Adam		2/17/2023 11:56 AM	Duthler, Kristina			In Progress								1
	Test, Bob	1145	2/10/2023 1:15 PM	Ibarra, Melony			Complete					Not urgent	Face to Face		2/10/2023 1:20
CANS Reporting Record Summary	Test, Larry	1143	2/10/2023 12:32 PM	Ibarra, Melony			In Progress					Not urgent	Face to Face		
CDAG Details	Test, Child	1141	2/10/2023 10:30 AM	Ibarra, Melony			In Progress					Not urgent	Call		
COAG Details	Test, Ryan	1134	1/31/2023 4:10 PM	Owens, Shalina			In Progress					Not urgent	Face to Face		
	Test, Lady	1125	1/27/2023 3:25 PM	Ibarra, Melony	Ibarra, Melony		In Progress	Access Unit		(916) 477-7777	Request for serv	Not urgent	Call	No special populatio	1/27/2023 3:27
Client Activity Tracker		1126	1/27/2023 1:17 PM	Duthler, Kristina			In Progress					Urgent	Call		1/27/2023 1:18
	Test, Michael	AAAX													
	Test, Michael Test, Michael	1126	1/25/2023 11:23 AM	Duthler, Kristina	Ibarra, Melony		In Progress	Access Unit	Office			Not urgent	Call		
Client Activity Tracker Client Clinical Problems Clinical Data Access Groups			1/25/2023 11:23 AM 1/25/2023 10:42 AM		Ibarra, Melony		In Progress Complete	Access Unit	Office			Not urgent Urgent	Call		

3. Opening Links

- If you need to get extra information, you can click on any link on the List Page and it will open a different page of information.
 - \circ $\;$ This will allow you to enter or update information in a different part of the record

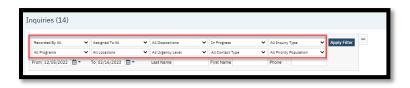
nquiries (3)									
Recorded By All	✓ A	ssigned To All	✔ All Dispositions	✓ AI	l Status 🗸	All Inquiry Type	✓ Apply Filter	-	
All Programs	✓ A	All Locations	✔ All Urgency Level	✓ Al	l Contact Type 🗸 🗸	All Priority Population	~		
From 02/01/2023	🛗 🔻 та	02/16/2023 🛅 🔻	Last Name	Fi	rst Name	Phone			
Client (Potential)	Client Id	Contact Type	Urgency Level	Inquirer	Start Date/Time	7 Recorded By	Assigned To	Disposition	Inquiry Status
Test, Bob	<u>1145</u>	Face to Face	Not urgent	Test, Bob	2/10/2023 1:15 PM	1 Ibarra, Melony			Complete
Test, Larry	<u>1143</u>	Face to Face	Not urgent	Test, Larry	2/16-2023 12:32 P	M Ibarra, Melony			In Progress
Test, Child	1141	Call	Not urgent	Test, Child	2/10/2023 10:30 A	M Ibarra, Melony			In Progress

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Inquiror Ir	formation 🗌 Cri											
		515										
Relation To C	ent Self	~	First Name	Bob	1	Middle Name		l	ast Name	Test		
Call Back			Ext		E	Email						
Start Date	02/10/2023	түш⇒	Start Time	1:15 PM	Now							
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	rmation (Potent	ial) Middle Nam			Last Name	Test	Cl	ient ID 114	<u>5</u>	Sex	Male	~
First Name		Middle Nam				Test 01/01/198		ient ID 114		Sex Medicaid Id	Male	•
First Name SSN	Bob	Middle Nam	ne		Last Name						Male	~
First Name SSN Home Phone O Client is not	Bob	Middle Nam	ne nown/Refuse	:d	Last Name DOB	01/01/198					Male	~
Client Info First Name SSN Home Phone Client is not homeless Address1	Bob 456123421 Client ie	Middle Nam SSN Unk Cell	ne nown/Refuse	:d	Last Name DOB Email	01/01/198					Male	

4. Upper Section

Saving and selecting filters as a favorite

- You can save and use different filter options for each List Page.
 - To Save a list page select the filters that you want to use



o Click on the "New favorites" button to save the filter



• To use the filter click on the "New Filter" icon



Exporting the List Page

• You can export the List page information into an excel spreadsheet by clicking on the **"Export"** icon.



• This will download the file and then you can open to view the information

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1	C	lient (Potential)	Client Id	Start Date/Time	Recorded By	Assigned To	Disposition	Inquiry Status	Program Name	Location	Phone	Inquiry Type	Urger							
2	т	lest, Larry	1143	2/10/2023 12:32:56 PM	Ibarra, Melony			In Progress					Not u							
3		Test, Child	1141	2/10/2023 10:30:26 AM	Ibarra, Melony			In Progress					Notu							
4		Test, Ryan	1134	1/31/2023 4:10:15 PM				In Progress					Not u							
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5	Т	lest, Lady	1125	1/27/2023 3:25:00 PM	Ibarra, Melony	Ibarra, Melony		In Progress	Access Unit		7777	g	Not u		Not urgent					
6	т	lest, Michael	1126	1/27/2023 1:17:43 PM	Duthler, Kristina			In Progress					Urger		Not urgent					
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Creating a new document from the list page

• By clicking on the **"New"** icon this will allow you to create a new entry for the topic of the list page you are in if applicable.



Creating and Selecting a new Column Configuration

• Creating a new Column Configuration-You can change the fields that appear on the List Page by creating a **New Column Configuration**.



- 1. You can **deselect the items** you do not want to appear or add items
- 2. You can also change the **order** the item appears on the list by changing the number in the "Order Field"
- 3. You can adjust the width of the column and set is as Not fixed and allow export.
- 4. Once you have made all of your changes you need name the setting **"View Name"**, select if it is the **"Default"** view. Click **"Insert"** then click **"Save"**

Recorded By All	List Page Configurations								8
All Programs From 12/05/2022		w Settings						Save Clo	ose
Client (Potential)	View Settings								_
Test, Bob					3				
Test Larsy	Show C umn Name		Order			Fix	ed 🖊	Export	
	Show C Jimn Name	(Client (Potential))	1	(1)	120		(Not Fixed)	Export (Export)	*
Test, Child		(Client (Potential)) (Client Id)	1 2	(1) (2)					*
Test, Child Test, Ryan Test, Lady	(Sh 1 ent (Potential)		1	_	120	(120)	(Not Fixed)	(Export)	
Test, Larry Test, Child Test, Ryan Test, Lady Test, Michael Test, Michael	(Sh 1 ent (Potential) (Show) Client Id	(Client Id)	1	(2)	120 80	(120) (80) (120) (120) (120)	(Not Fixed) (Not Fixed)	(Export)	

• Once a new Column configuration is created, you can select the configuration you want to use to show only the data you need to view.



• To close the List Page you can click on the "Close" icon



Report information

Reports allow you to view and print information by **Program and** or other criteria. You can export the data into other formats as well as printing.

Program Dutos	atlans MH Adult 🗸 🗸	Find Next 😽		3. Page Selection	eport Layou n, Search, Export, n & Print		🚖
			Allergies				
Client ID	Last Name	First Name	Allergy	Allergy Reaction	Allergy Severity		
	1032 Thompson	Toby	Penidlins	Selzure	Severe		
	1093 Barnes	Kim	Sulfa (Sulfonamide Antibiotics)	Swollen face, lips, or tongue	Moderate to severe	4. Report Information	
	1032 Thompson	Toby	Sulfa (Sulfonamide Antibiotics)	Hives	Sovere		
	1130 Test	Charlotte	Peanut	Hives	Medium		
	1093 Barnes	Kim	mik	Hives	Moderate to severe		
	1120 Test	Kim	Peanut	Seizure	Severe		

 Report Parameters-Select the Report Parameters needed to run the report. Depending on the Report there are different filters/criteria that you need to select before you click on "View Report".

Example 1

Program	Outpatient MH Adult	~	

Example 2

Program	Outpatient MH Adult	~	Date 2/28/2023	3	
Example 3					
Administration F Order Type	From 2/7/2023		Administration To Save to Client Record as PDF	2/28/2023	

Upper Section- You can save and retrieve a layout as a favorite for a report using the favorite's icons. You need to click on "View Report" to display the information based on the criteria selected.



3. Middle Pane- Page selection, Search, Export, Refresh & Print- Once the data is displayed in the information pane you can Navigate if there is more than one page. You can also Export or print the data (see below)

Page Selection-once the report has rendered you can navigate to additional pages

Program Out	patient MHrt dult	•	
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			A
Client ID	Last Name	First Name	Allerg
	1032 Thompson	Toby	Penici

Search Report-You can search for key words in the report

Program Outpatier	nt MH Adult 🗸 🗸			
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	_		Allergie	es
Client ID	Last Name	First Name	Allergy	Allergy
10	32 Thompson	Toby	Penicillins	Seizur

Program Outpatient	MH Adult 🗸 🗸						
14 4 1 of 1	è li ¢	Find Next	4	Vord Excel	ies		
Client ID	Last Name	First Name		PDF TIFF file MHTML (web archive) CSV (comma delimited)		Allergy Reaction	Allergy Severity
1032	? Thompson	Toby		XML file with report data Data Feed		Seizure	Severe

Refresh & print-You can Refresh the report or Print the report to a printer



4. Report Information-This is where the information that was requested is displayed

1 4 <u>1</u> of 1		Find Next 😽	• (*) (#		Show / Hide Parameter
			Allergies		
Client ID	Last Name	First Name	Allergy	Allergy Reaction	Allergy Severity
1032	Thompson	Toby	Penicillins	Seizure	Severe
1093	Barnes	Kim	Sulfa (Sulfonamide Antibiotics)	Swollen face, lips, or tongue	Moderate to severe