

Reports Crosswalk: SanWITS to SmartCare Reports (Incomplete List)



SmartCare has robust reporting functionality that exceeds that of SanWITS and CCBH. 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 SanWITS 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 SanWITS 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 functionality.

	Report Category or Main Report Name	Report Description and/or Key Variables	Type of Report in SmartCare*	SmartCare Canned Report Name
1	ASAM Report	Assessment date, type, LOC	CAN	CalMHSA ASAM LOC Report
2	NOABD Report	Unknown or N/A	SSRS	Unknown or N/A
3	Level of Care Report	Unknown or N/A	CAN	Level of Care Report
4	Clients Length of Stay in Treatment	Clinician	SSRS	Hospitalization Length of Stay
5	Care Summary Report	Unknown or N/A	SSRS	Summary of Care
6	FABHC Client Demographic Information	Unknown or N/A	SSRS	Client Demographic Breakdown
7	Authorization Report	Unknown or N/A	SSRS	Authorization Report
8	Authorization Report without services	Date, Payor, Plan, Authorization Code	SSRS	Authorization Report
9	Program Locations	Program ID	SSRS	Client Programs
10	All SanWits Clients	Program ID	SSRS	Client Served by Program
11	Program Enrollment Counts	Count of Clients (Program OIE, Enrollment/Disenrollment, No service last 30/60 Days)	CAN	CalMHSA Open Enrollments and Last Service Date Report (My Office)
12	Claims released and not batched	claims waiting to be batched	CAN/SSRS	Unpaid claims or Charges/Claims list page
13	Client List by Program	Open enrollments and last service date	SSRS	CalMHSA Open Enrollments and Last Service Date Report (My Office)
14	Claims on hold	claims on hold	SSRS	Charges/Claims list page
15	No Show Encounters	client no shows	CAN	No Shows Report
16	1-09 Active Clients	OIE clients	CAN?	CalMHSA Open Enrollments and Last Service Date Report (My Office)
17	Wait List by Agency, Facility & Program	Count of clients on wait list	CAN?	CalMHSA TADT Report (My Office) or CalMHSA New Client Inquiries Without Program TADT Report

	Report Category or Main Report Name	Report Description and/or Key Variables	Type of Report in SmartCare*	SmartCare Canned Report Name
18	10-04 Access Time Report	Initial Contact Date and First Offered Intake/Screening Appt Date	SSRS/GAP	CalMHSA TADT Report (My Office)
19	10-03 Access Time Report (for BHS Staff)	Initial Contact Date and First Offered Intake/Screening Appt Date	SSRS/GAP	CalMHSA TADT Report (My Office)
20	Active Clients with Date Parameter (McAlister folder)	List of OIE clients	CAN (Possible)	CalMHSA Open Enrollments and Last Service Date Report (My Office)
21	Bed Management	Available beds	SSRS	<i>Unknown or N/A</i>
22	Bed management with LOC 2	Available beds	SSRS	<i>Unknown or N/A</i>
23	Residential Bed Utilization	Bed utilization	SSRS	<i>Unknown or N/A</i>
24	1-05 Active Client with Address Search	Client Address and Address Type, and Case Status	CAN/SSRS	Staff Caseload with Address and Phone Number (My Office)
25	SUDPI-19 Concurrent Open PE in an Episode	Concurrent open PE client	CAN	CalMHSA Open Enrollments and Last Service Date Report (My Office)
26	Length of Treatment Report	Length of treatment and LOC	SSRS	CalMHSA Aftercare/Discharge summary or Number of successful discharges
27	1-13 Active Caseload Census DETAIL Report	Active caseload by program including client info	SSRS	Staff Caseload with Address and Phone Number (My Office)
28	1-07a SUD Data for SDIR Match	All clients with an Admission Date On or Before 12/31/10.	CAN	Program Assignments (Program)
29	1-07b SUD Data for SDIR Match	All clients with an Admission Date From 1/1/11 To 12/31/17	CAN	Program Assignments (Program)
30	1-07c SUD Data for SDIR Match	All clients with an Admission Date On or After 1/1/18	CAN	Program Assignments (Program)
31	10-06 Days Since Last Login	Staff Last Login	CAN/SSRS	CalMHSA Active User and Last Login Report (My Office)
32	1-14 Active Caseload Census SUMMARY Report	Caseload summary	SSRS	Staff Caseload with Address and Phone Number (My Office)
33	1-16 Facility Extract and Bed Management	Programs details, license, national provider ID, etc	SSRS	<i>Unknown or N/A</i>
34	3-15 Encounter Report with Contact Type and Service Location (REV 7.1.23)	Service location and contact type	CAN/SSRS	Service Report
35	Facility Program List	Facility Information	SSRS	CalMHSA Program Meta Tagging LP (Administration)
36	Admit-Discharge (McAlister folder)	Client Admission and Discharge	CAN	Program Assignments (Program)
37	Admit-Discharge (VVSD)	Client Admission and Discharge	CAN	Program Assignments (Program)
38	Client Data Profile for Program Enrollment (HR360)	Client Admission and Discharge	CAN	Program Assignments (Program)

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39	Completed (Freedom Ranch)	Successful Discharge	CAN/SSRS	Number of Successful Discharges (My Office)
40	Left Before - Satisfactory (Freedom Ranch)	Successful Discharge	CAN/SSRS	Number of Successful Discharges (My Office)
41	Left Before - Unsatisfactory (Freedom Ranch)	Unsatisfactory Discharge	CAN/SSRS	Number of Successful Discharges (My Office)
42	Treatment Completions w LOS 30 days_Employed (NEW)	Discharge Status with LOS and Employment Status	CAN/SSRS	Number of Successful Discharges (My Office)
43	Treatment Completions w LOS 30 days_Housed (NEW)	Discharge Status with LOS and Living Arrangement Status	CAN/SSRS	Number of Successful Discharges (My Office)
44	Treatment Completions w LOS greater than 30 day (NEW)	Discharge Status with LOS	CAN/SSRS	Number of Successful Discharges (My Office)
45	Admission Discharge Errors (Kiva) (McAlister folder)	"In Progress" Discharge Status	CAN/SSRS	Number of Successful Discharges (My Office)
46	Discharge Summary Report with LOS (Turning Point)	Discharge Status with LOS	CAN/SSRS	Number of Successful Discharges (My Office)
47	No New Arrests w LOS greater than 30 days_Completed (NEW)	Discharge Status with LOS	CAN/SSRS	Number of Successful Discharges (My Office)
48	3-15 Encounter Report with Contact Type and Service Location (REV 7.1.23)	Encounter without Contact Type	CAN/SSRS	Access to Services Reporting (My Office)
49	3-15 Encounter Report with Contact Type and Service Location	Encounter without Contact Type	CAN/SSRS	Access to Services Reporting (My Office)
50	3-19 Telehealth Services (for QSR Reporting)	Telehealth Contact Type	CAN/SSRS	Access to Services Reporting (My Office)
51	3-20 Telephone Services	Phone Contact Type	CAN/SSRS	Access to Services Reporting (My Office)
52	4-01b Total Services per Rendering Staff - post 7.1.23	Total Services by Rendering Staff	SSRS	Staff Multiple Service Detail Report (My Office) or Service Report Excel Format (My Office)
53	4-01a Total Services per Rendering Staff - pre 7.1.23	Total Services by Rendering Staff	SSRS	Staff Multiple Service Detail Report (My Office) or Service Report Excel Format (My Office)
54	Client Selection for Reviews	Total Services by Rendering Staff	SSRS	Staff Multiple Service Detail Report (My Office) or Service Report Excel Format (My Office)
55	Encounter Data with Contact Type (Tradition One)	Encounter without Contact Type	CAN/SSRS	Access to Services Reporting (My Office)
56	Encounter Data with Contact Type (TRC-NI)	Encounter without Contact Type	CAN/SSRS	Access to Services Reporting (My Office)

	Report Category or Main Report Name	Report Description and/or Key Variables	Type of Report in SmartCare*	SmartCare Canned Report Name
57	Encounter Data with Contact Type (TRC-NI) (REV 7.1.23)	Encounter without Contact Type	CAN/SSRS	Access to Services Reporting (My Office)
58	Encounter Location (SIP Only) (REV 7.1.23)	Client Encounter Information	CAN/SSRS	Access to Services Reporting (My Office)
59	Rendering Staff Productivity (ECS CERRC) (523186)	Total Services by Rendering Staff	SSRS	Staff Multiple Service Detail Report (My Office) or Service Report Excel Format (My Office)
60	Caloms Report (Acadia)	Annual Update Due Date	CAN	CalOMS Report Summary (My Office)
61	Caloms Report (ARMT Medical Specialists)	Annual Update Due Date	CAN	CalOMS Report Summary (My Office)
62	Caloms Report (El Dorado)	Annual Update Due Date	CAN	CalOMS Report Summary (My Office)
63	Caloms Report (MTS - Escondido)	Annual Update Due Date	CAN	CalOMS Report Summary (My Office)
64	Caloms Report (MTS - Oceanside)	Annual Update Due Date	CAN	CalOMS Report Summary (My Office)
65	Caloms Report (MTS - San Diego)	Annual Update Due Date	CAN	CalOMS Report Summary (My Office)
66	Caloms Report (VVSD)	Annual Update Due Date	CAN	CalOMS Report Summary (My Office)
67	5-02 Facility Identifier Program Report (79832)	Program Info	SSRS/GAP	CalMHSA Program Meta Tagging LP (Administration)
68	5-03 Facility Identifier	Program Info	SSRS/GAP	CalMHSA Program Meta Tagging LP (Administration)
69	Contacts with Accepted Appointment List -- Detail	Accepted screening appointment with no show	SSRS/GAP	CalMHSA TADT Report (My Office)
70	No Show Contacts List -- Detail	Accepted screening appointment with no show	SSRS/GAP	CalMHSA TADT Report (My Office)
71	10-07 SUD No Show Report	Accepted screening appointment with no show	SSRS/GAP	CalMHSA TADT Report (My Office)
72	SUD Encounter Look Up	Client with accepted screening appointment with no show	SSRS/GAP	CalMHSA TADT Report (My Office)
73	BASIC-ConnectWELL	Program Info	SSRS/GAP	CalMHSA Program Meta Tagging LP (Administration)
74	Facility Assignment for Staff Report	Staff Information	SSRS	Provider Staff Details (My Office)
75	NPI Staff Report (with User ID)	NPI Staff Information	SSRS/GAP	Provider Staff Details (My Office)
76	NPI Staff	NPI Staff Information	SSRS/GAP	Provider Staff Details (My Office)
77	4-04 NPI Staff Report with Categories	NPI Staff Information	SSRS/GAP	Provider Staff Details (My Office)
78	SanWITS Facility Report 3	Facility Information	SSRS/GAP	CalMHSA Program Meta Tagging LP (Administration)
79	All Admissions Report (TRC-NI)	Client CalOMS Demographic Data	SSRS/GAP	Client Demographic Breakdown (My Office)
80	Avg. Age (Freedom Ranch)	Average age	SSRS	<i>Unknown or N/A</i>

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81	Census Report (TRC-NI)	Client Information	SSRS/GAP	<i>Unknown or N/A</i>
82	Client Contacts Report (ECS CERRC)	Intake data after contact	SSRS/GAP	<i>Unknown or N/A</i>
83	Admissions, Client Demographics	Start Date, End Date	<i>Unknown or N/A</i>	Client Demographic Breakdown, CalOMS Admissions
84	Client Contacts Report (McAlister)	Intake data after contact	SSRS/GAP	<i>Unknown or N/A</i>
85	Client Data Profile for Episodes (HR360)	Client's intake and close date for all episodes	SSRS/GAP	<i>Unknown or N/A</i>
86	10-01 SanWITS Data Entry Standards Report	Data Entry Standards	SSRS	CalOMS Report Summary (My Office)
87	10-01 SanWITS Data Entry Standards Report	Data Entry Standards	SSRS	<i>Unknown or N/A</i>
88	10-01 SanWITS Data Entry Standards Report	Data Entry Standards	SSRS/GAP	<i>Unknown or N/A</i>
89	10-01 SanWITS Data Entry Standards Report	Data Entry Standards	SSRS/GAP	<i>Unknown or N/A</i>
90	10-02 SanWITS Data Entry Standards Report for Methadone Dosing	Data Entry Standards	SSRS/GAP	<i>Unknown or N/A</i>
91	4-02 Active Staff in SanWITS	Active staff with system account status	CAN	Staff/Users (Administration) or Provider Staff Details (My Office)
92	Intake Clients with MPI	All clients with Intakes that have MPI number	SSRS/GAP	<i>Unknown or N/A</i>
93	Intake Clients without MPI	All clients with Intakes that have no MPI number	SSRS/GAP	<i>Unknown or N/A</i>
94	ISCA Staff Report with Last Operation Timestamp	Staff's Agency locked status, roles, and Last Operation Time Stamp	CAN?	CalMHSA Active User and Last Login Report (My Office)
95	ISCA Staff Report	Staff's Agency locked status and roles	CAN?	Staff/Users (Administration) or Provider Staff Details (My Office)
96	Staff Role Assignment	Staff roles	CAN/SSRS	Staff/Users (Administration) or CalMSHA User Role Report (My Office)
97	Agency Client Movement	Number of Admission, Discharge, and LOS	SSRS	Program Assignments (Program)