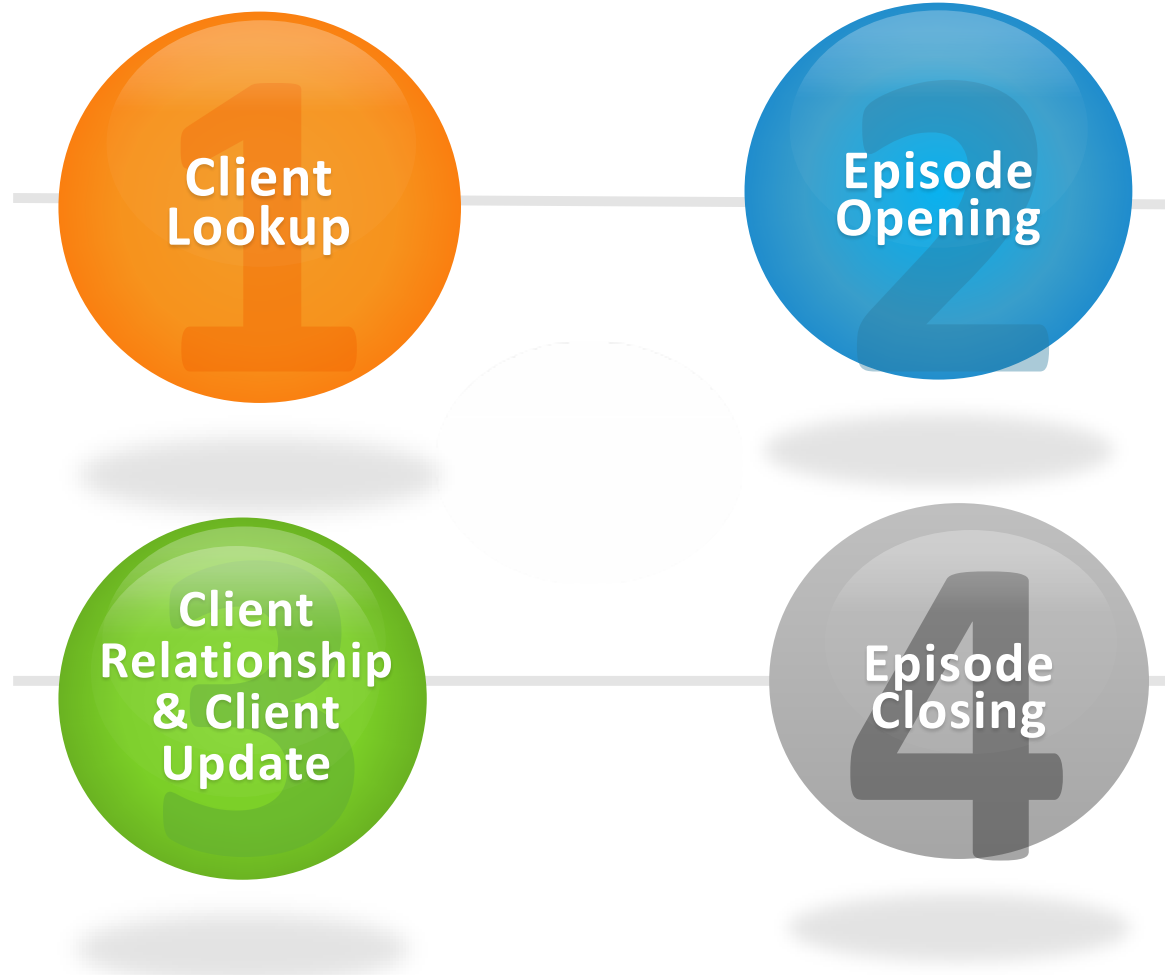




County of San Mateo Avatar

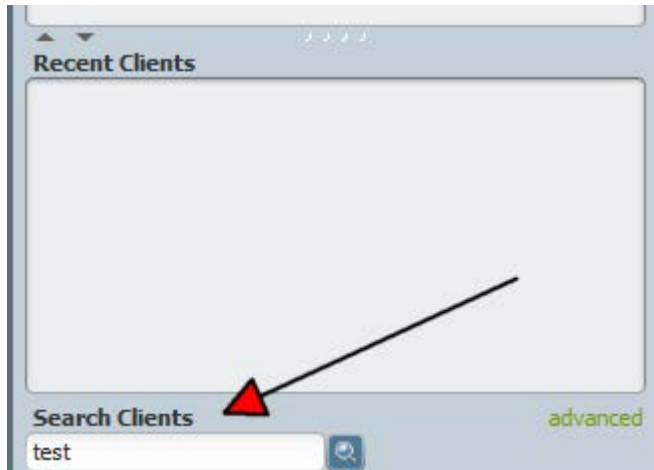




AVATAR Client Lookup



Avatar Client Lookup



Clients can be searched in Avatar various ways:
by Avatar ID, Birth date, SSN, Alias, Last Name

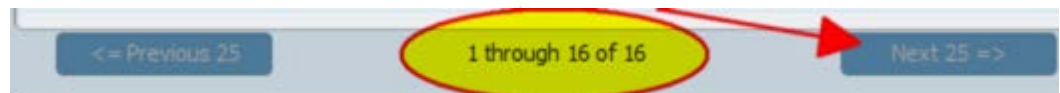
Steps

1. In the Search Client screen, enter the client's last name, SSN, Birth date, Avatar ID or Alias

2. Avatar utilizes “**Smart Search**” all clients with the same last name or sounding like your client's last name will appear. For the name “Test” there are 16. If there were more they would appear on the “Next 25”

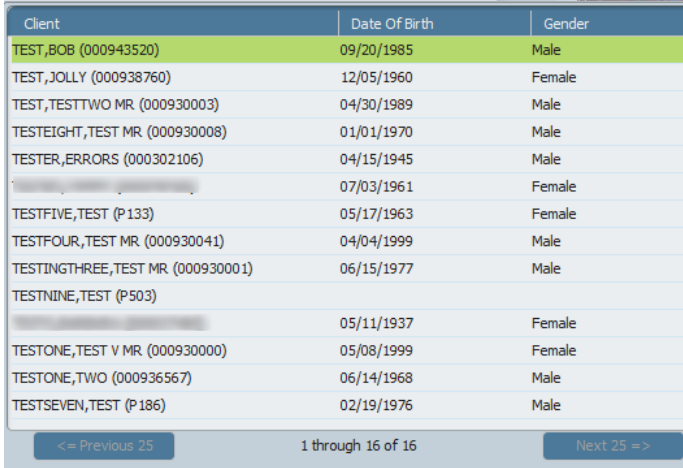
Client	Date Of Birth	Gender
TEST,BOB (000943520)	09/20/1985	Male
TEST,JOLLY (000938760)	12/05/1960	Female
TEST,TESTTWO MR (000930003)	04/30/1989	Male
TESTEIGHT,TEST MR (000930008)	01/01/1970	Male
TESTER,ERRORS (000302106)	04/15/1945	Male
TESTTHREE,TEST MR (000930006)	07/03/1961	Female
TESTFIVE,TEST (P133)	05/17/1963	Female
TESTFOUR,TEST MR (000930041)	04/04/1999	Male
TESTINGTHREE,TEST MR (000930001)	06/15/1977	Male
TESTNINE,TEST (P503)		
TESTSIX,TEST MR (000930007)	05/11/1937	Female
TESTONE,TEST V MR (000930000)	05/08/1999	Female
TESTONE,TWO (000936567)	06/14/1968	Male
TESTSEVEN,TEST (P186)	02/19/1976	Male

<= Previous 25 1 through 16 of 16 Next 25 =>



Avatar Client Lookup

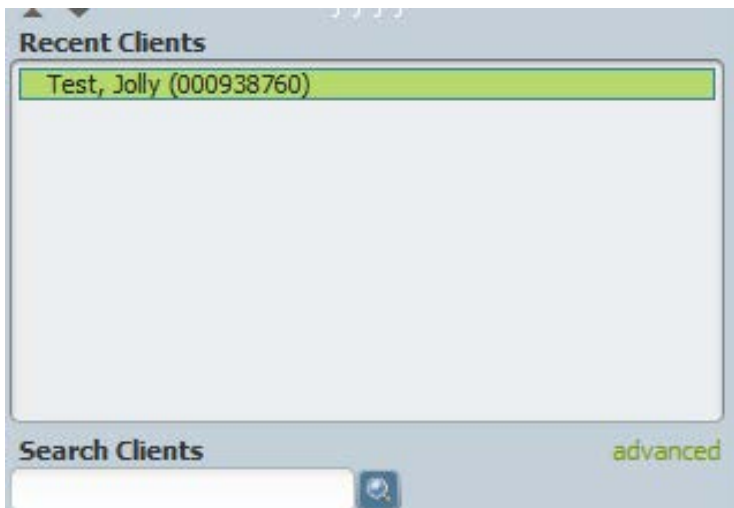
3. By clicking on a client, it becomes highlighted (green).



Client	Date Of Birth	Gender
TEST,BOB (000943520)	09/20/1985	Male
TEST,JOLLY (000938760)	12/05/1960	Female
TEST,TESTTWO MR (000930003)	04/30/1989	Male
TESTEIGHT,TEST MR (000930008)	01/01/1970	Male
TESTER,ERRORS (000302106)	04/15/1945	Male
[REDACTED]	07/03/1961	Female
TESTFIVE,TEST (P133)	05/17/1963	Female
TESTFOUR,TEST MR (000930041)	04/04/1999	Male
TESTINGTHREE,TEST MR (000930001)	06/15/1977	Male
TESTNINE,TEST (P503)		
[REDACTED]	05/11/1937	Female
TESTONE,TEST V MR (000930000)	05/08/1999	Female
TESTONE,TWO (000936567)	06/14/1968	Male
TESTSEVEN,TEST (P186)	02/19/1976	Male

<= Previous 25 1 through 16 of 16 Next 25 =>

4. Once selected, the client is placed in the **“Recent Clients”** box



Recent Clients

Test, Jolly (000938760)

Search Clients advanced



Avatar

Episode Opening

Admission (Outpatient)

Chart Admission (Outpatient)

Admission

- Demographics
- Other Client Data

Submit

Online Documentation

Episode Number **102**

Client Name TESTONE, TEST V MR

Sex Female Male Unknown

Date Of Birth 05/08/1962

Age 56

Preadmit/Admission Date 06/17/2017

Preadmit/Admission Time 10:08 AM

Program 410307 OASIS

Type Of Admission First Admission

Source Of Admission

Primary Therapist / Counselor

Primary Psychiatrist / Supervisor WILCOX-RITTIGERS, TERRY (060045)

Anniversary Date (MM/DD)

SMMC MRN / ID (MIS use ONLY)

Social Security Number

Alternate Social Security Number

Client's Living Arrangements House/ Apt incl trailers, hotels, dorms, etc

Disabilities-1

- None
- Semi - Ambulatory
- Non - Ambulatory
- Severe Sight Disability
- Blind
- Organic Based Communication Disability
- Chronic Health Problem
- Mental Retardation / Developmental Disability
- Severe Hearing Disability
- Deaf
- Sign Language Interpreter

Disabilities-2

- None
- Semi - Ambulatory
- Non - Ambulatory
- Severe Sight Disability
- Blind
- Organic Based Communication Disability
- Chronic Health Problem
- Mental Retardation / Developmental Disability
- Severe Hearing Disability
- Deaf
- Sign Language Interpreter

Disabilities-3

- None
- Semi - Ambulatory
- Non - Ambulatory
- Severe Sight Disability
- Blind
- Organic Based Communication Disability
- Chronic Health Problem
- Mental Retardation / Developmental Disability
- Severe Hearing Disability
- Deaf
- Sign Language Interpreter

Received Copy Of Client Rights Yes No

Advanced Directive Yes No

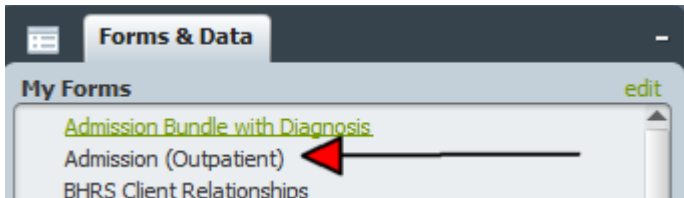
Red=Required fields

Episode is auto assigned and cannot be changed

Avatar Episode Opening (Admitting a New Client)

Steps

1. After searching for a client with client lookup and if the client is not in the system, you are ready to open a new client.



2. Select **Admission Outpatient** form from your list of forms, the **Select Client** box should appear

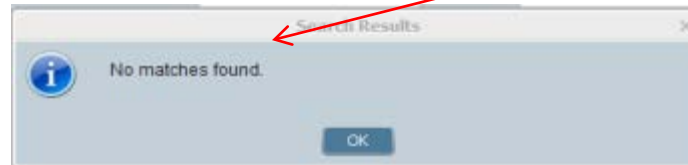


The screenshot shows a "Select Client" dialog box. At the top, the title "Select Client" is highlighted in yellow. Below the title, there are several input fields: "Last Name", "First Name", "Sex", "Social Security #", "Date of Birth", "Assigned ID", and "Claim Number". Below these fields are four buttons: "Search", "Clear", "View Client Picture", and "View Episodes". At the bottom of the dialog, there is a table with the following columns: "Name", "ID", "Date Of...", "Social S...", "Client's...", "Alias", and "Family N...". Below the table are three buttons: "Select", "New Client", and "Cancel".

Avatar Episode Opening (Admitting a New Client)

3. In the Select Client screen, enter the client last name, first name, and sex. Click Search.

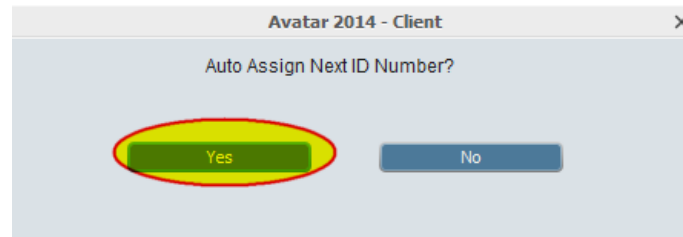
4. If a client is found, select the client, click OK. If a client is not found, the **No Matches found** box will display



5. click **New Client**.



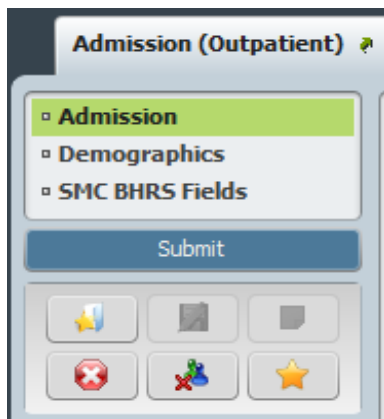
6. The Auto Assign dialog display, Click **Yes** to generate an ID number.



Avatar Admission (Section)

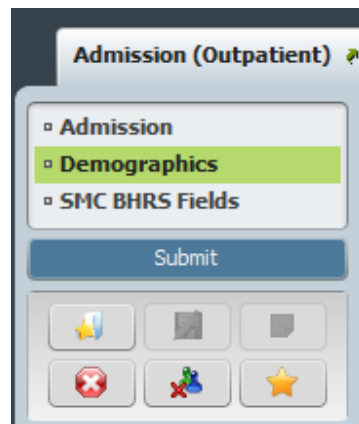
The Admission (Outpatient) form is divided in 3 sections

1. Admission



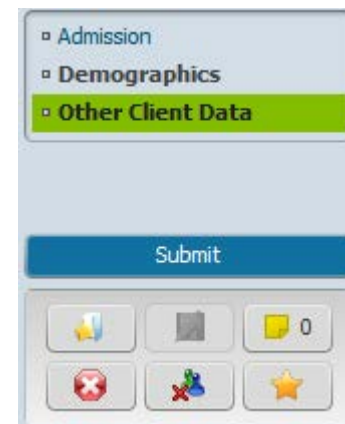
A screenshot of the 'Admission (Outpatient)' form. The title bar at the top reads 'Admission (Outpatient)'. Below the title bar, there is a list of sections: 'Admission', 'Demographics', and 'SMC BHRS Fields'. The 'Admission' section is highlighted with a green background. Below the list is a blue 'Submit' button. At the bottom, there is a row of six icons: a yellow star, a grey document, a grey speech bubble, a red 'X' in a circle, a blue person icon, and a yellow star.

2. Demographics



A screenshot of the 'Admission (Outpatient)' form. The title bar at the top reads 'Admission (Outpatient)'. Below the title bar, there is a list of sections: 'Admission', 'Demographics', and 'SMC BHRS Fields'. The 'Demographics' section is highlighted with a green background. Below the list is a blue 'Submit' button. At the bottom, there is a row of six icons: a yellow star, a grey document, a grey speech bubble, a red 'X' in a circle, a blue person icon, and a yellow star.

3. Other Client Data



A screenshot of the 'Admission (Outpatient)' form. The title bar at the top reads 'Admission (Outpatient)'. Below the title bar, there is a list of sections: 'Admission', 'Demographics', and 'Other Client Data'. The 'Other Client Data' section is highlighted with a green background. Below the list is a blue 'Submit' button. At the bottom, there is a row of six icons: a yellow star, a grey document, a grey speech bubble with a '0' next to it, a red 'X' in a circle, a blue person icon, and a yellow star.

This section is currently not being used

Avatar Admission (Section)

Episode Number: 1

Client Name: TEST ONE, TEST V MR

Sex: Female Male Unknown

Date Of Birth: 05/08/1962 **1**

Age: 56

Preadmit/Admission Date: 12/03/2009 **2**

Preadmit/Admission Time: 03:59 PM **3** Current H M AM/PM

Program: 416800 EAST BAYSHORE ADULT **4**

Type Of Admission: First Admission **5**

Source Of Admission: **6**

Primary Therapist / Counselor: ECC, TEST1 (000001) **7**

Primary Psychiatrist / Supervisor:

Anniversary Date (MM/DD): 01/01

SMMC MRN / ID (MIS use ONLY!):

Social Security Number: 222-55-9999 **8**

Alternate Social Security Number:

Client's Living Arrangements: Adult Resident Facility **9**

1. Date of Birth
2. Admission Date
3. Admission Time
4. Program
5. Type of Admission
6. Source of Admission
7. Primary Therapist/Counselor
8. SSN
9. Living Arrangements

Avatar Admission (Section)

The screenshot shows a web-based form for 'Avatar Admission'. It is divided into several sections:

- Disabilities-1**: A list of radio button options including 'None', 'Semi - Ambulatory', 'Non - Ambulatory', 'Severe Sight Disability', 'Blind', 'Organic Based Communication Disability', 'Chronic Health Problem', 'Mental Retardation / Developmental Disability', 'Severe Hearing Disability', 'Deaf', and 'Sign Language Interpreter'. A red circle with the number 10 is placed to the right of this section.
- Disabilities-2**: A list of radio button options including 'None', 'Semi - Ambulatory', 'Non - Ambulatory', 'Severe Sight Disability', 'Blind', 'Organic Based Communication Disability', 'Chronic Health Problem', 'Mental Retardation / Developmental Disability', 'Severe Hearing Disability', 'Deaf', and 'Sign Language Interpreter'. A red circle with the number 11 is placed to the right of this section.
- Disabilities-3**: A list of radio button options including 'None', 'Semi - Ambulatory', 'Non - Ambulatory', 'Severe Sight Disability', 'Blind', 'Organic Based Communication Disability', 'Chronic Health Problem', 'Mental Retardation / Developmental Disability', 'Severe Hearing Disability', 'Deaf', and 'Sign Language Interpreter'. A red circle with the number 12 is placed to the right of this section.
- Received Copy OF Client Rights**: A horizontal row with two radio buttons labeled 'Yes' and 'No'. A red circle with the number 14 is placed to the right of the 'No' button.
- Advanced Directive**: A horizontal row with two radio buttons labeled 'Yes' and 'No'. A red circle with the number 13 is placed to the right of the 'Yes' button.
- Advanced Directive Note**: A text area with a vertical scrollbar. A red circle with the number 15 is placed to the right of the text area.
- Admission Note**: A text area with a vertical scrollbar. A red circle with the number 16 is placed to the right of the text area.
- Team Assignment**: A dropdown menu showing '416800 (EAST BATSHORE ADUL' with a downward arrow. A red circle with the number 17 is placed to the right of the dropdown.
- Is this a Transition in Care?**: A horizontal row with two radio buttons labeled 'Yes' and 'No'. A red circle with the number 18 is placed to the right of the 'Yes' button.

10. Disabilities -1
(if None – Disabilities 2 & 3 are grayed out)

11. Disabilities- 2
12. Disabilities-3
13. Copy of Client Rights
(Should always be Yes)

14. Advance Directive
15. Advanced Directive Note

16. Admission Note
17. Team Assignment
18. Transition in Care

Avatar Demographics (Section)

Even though this section is not required it is recommended that this form be completed with as much information as possible.

The screenshot shows a web form for 'Avatar Demographics' with 27 numbered red circles highlighting specific fields:

- 1. Client Last Name (TESTONE)
- 2. Client First Name (TEST)
- 3. Client's Middle Initial
- 4. Suffix (Sr, Jr, III, IV, V, VI)
- 5. Client's Address - Street (1235 APPLE ST APT 12)
- 6. Client's Address - Zipcode (94403)
- 7. Client's Address - City (SANMATEO)
- 8. Client's Address - County (SAN MATEO)
- 9. Client's Address - State (CALIFORNIA)
- 10. Client's Home Phone (650-573-0000 X - 1234)
- 11. OK to contact/leave message (Home Phone) (Yes)
- 12. Client's Work Phone (650-573-2525)
- 13. OK to contact/leave message (Work Phone) (No)
- 14. Client's Cell Phone (650-573-3400)
- 15. OK to contact/leave message (Cell Phone) (Yes)
- 16. Primary Phone (Home Phone)
- 17. Maiden Name (TESTSINGLE)
- 18. Marital Status (Married)
- 19. Occupation (Machine Operators And Tenders)
- 20. Employment Status (Part time <35hrs per wk (nonco.))
- 21. Education (20+ Years)
- 22. Client's Email Address (testonetest@gmail.com)
- 23. Client Admission Packet Preference (E-mail)
- 24. Date Admission Packet Distributed (01/01/2001)
- 25. Smoker (Unknown If Ever Smoked)
- 26. Smoking Status Assessment Date (01/01/2001)

At the bottom left, there is an 'Alias' field with the text 'TESTING' and a red arrow pointing to it.

Use this field to enter ALIAS information only

1. Client Last Name (**auto populated**)
2. Client First Name (**auto populated**)
3. Client Middle Initial
4. Suffix (**if applicable**)
5. Client's Address
6. Client's Zipcode
7. Client's City
8. Client's County
9. Client's State
10. Client's Home Phone
11. Ok to contact
12. Client's Work Phone
13. Ok to contact
14. Client's Cell Phone
15. Ok to contact
16. Primary Phone
17. Maiden Name (**if applicable**)
18. Marital Status
19. Occupation
20. Employment Status
21. Education
22. Email
23. Client Admission Packet Preference
24. Date Admission Packet Distributed
25. Smoker
26. Smoking Status Assessment Date (enter 01/01/2001)
27. Alias (**8 available**)

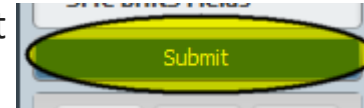
Avatar Demographics (Section)

▫ Admission
▫ **Demographics**
▫ Other Client Data

Submit

Icons: Home, Grid, 0, Stop, Add, Star

After completing the Demographics section , your ready to save the form, click submit to save the form.



Now you've just completed an Episode Opening.



Avatar Client Relationship
& Client Update



BHRS Client Relationship

List of All Client Relationships

Type of Relationship	Last Name / Agency Name	First N...	Home Ph...	Cell Ph...	Release Available?	Release Start Date
Attorney / Lawyer	Resa	Alexis	5555555...		Yes (Full)	10/11/2012
Mother	TEST	MARY	6505551...		No	
Attorney / Lawyer	appleseed	Johnny				

Add New Item Edit Selected Item Delete Selected Item

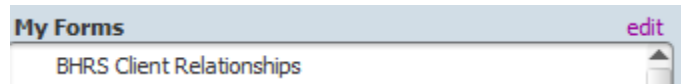
Type of Relationship: Attorney / Lawyer
Last Name / Agency Name: Resa
Other Relationship:
First Name: Alexis
Address - Street:
City: Redwood City
Address - Street 2:
State: CALIFORNIA
Zip Code: 94400

Home Phone: 5555555555
Cell Phone:
Work Phone:
Email Address:
Best Number/Time to Contact:

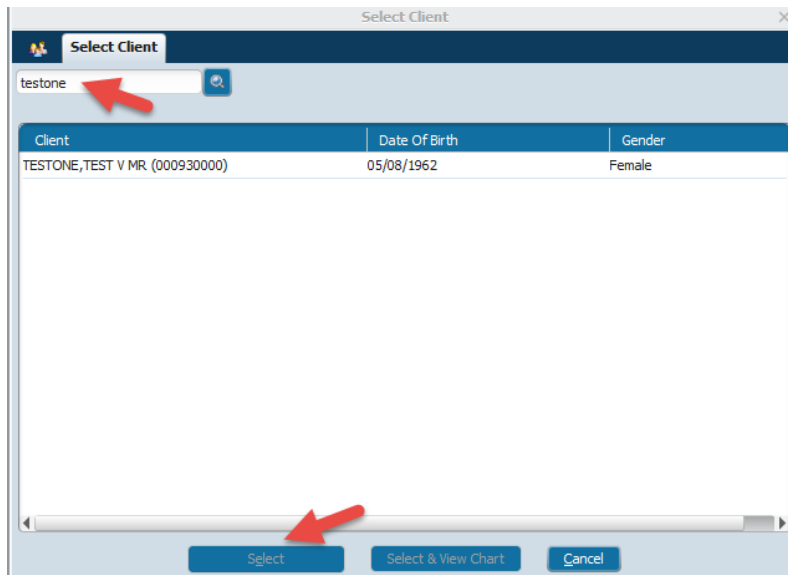
Release Available?: Yes (Full)
Release Start Date: 10/11/2012
Release End Date: 11/10/2012
Legal Guardian?: Yes No Unknown
Emergency Contact?: Yes No
Next of Kin?: Yes No

Notes (Record any limitation to the release of information in this Notes field.)

Red=Required fields



Select **BHRS Client Relationship** form from your list of forms, the **Select Client** box should appear



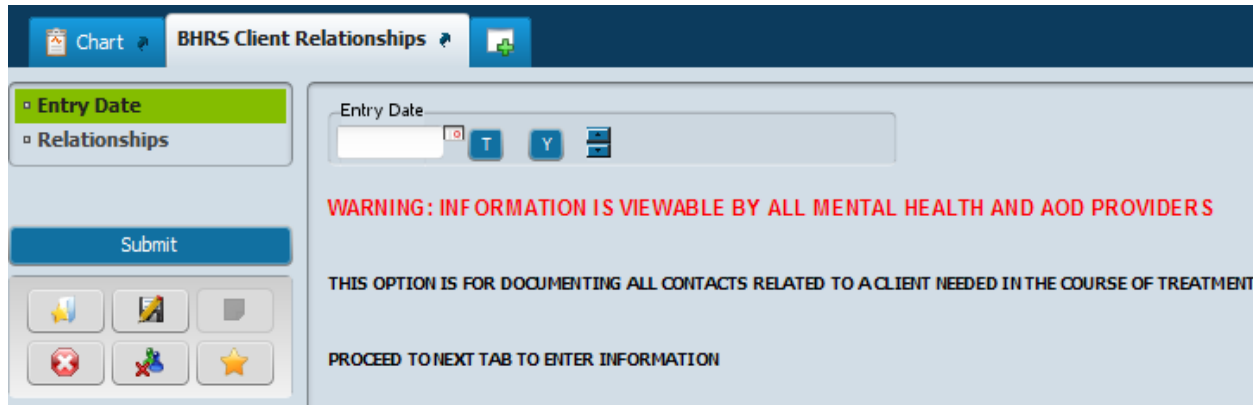
Enter Client ID or Type in last name, first name

Select the Client

Avatar BHRIS Client Relationship

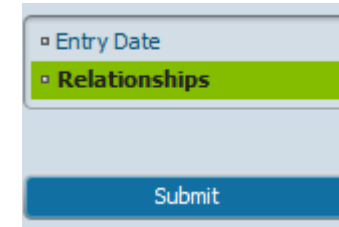
The BHRIS Client Relationship form has 2 sections

1. Entry Date



The screenshot shows the 'BHRIS Client Relationships' form. The 'Entry Date' tab is selected and highlighted in green. The form contains an 'Entry Date' input field with a calendar icon and a 'Submit' button. Below the input field, there is a red warning message: 'WARNING: INFORMATION IS VIEWABLE BY ALL MENTAL HEALTH AND AOD PROVIDERS'. Below the warning, there is a note: 'THIS OPTION IS FOR DOCUMENTING ALL CONTACTS RELATED TO A CLIENT NEEDED IN THE COURSE OF TREATMENT'. At the bottom, there is a instruction: 'PROCEED TO NEXT TAB TO ENTER INFORMATION'. The left sidebar contains a 'Submit' button and several icons for navigation and actions.

2. Relationships



The screenshot shows the 'BHRIS Client Relationships' form with the 'Relationships' tab selected and highlighted in green. The 'Entry Date' tab is also visible and highlighted in blue. Below the tabs, there is a 'Submit' button.

Warning: Information is viewable by all Mental Health and AOD Providers

Type of Relationship	Last Name / Agency Name	First N...	Home Ph...	Cell Ph...	Release Available?	Release Start Date
Attorney / Lawyer	Resa	Alexis	5555555...		Yes (Full)	10/11/2012
Mother	TEST	MARY	6505551...		No	

a new line (green) is added

To add a new contact, click **"Add New Item"**

1 Type of Relationship: Aunt

2 Last Name / Agency Name: Testing

3 Other Relationship: [Empty]

4 First Name: Tester

5 Address - Street: 2000 Alameda

6 City: San Mateo

7 State: CALIFORNIA

8 Zip Code: 94403

1. Type of Relationship
2. Last Name/Agency Name
3. Other Relationship
4. First Name
5. Address – St.
6. City
7. State
8. Zip Code

Home Phone **9**

Cell Phone **10**

Work Phone **11**

Email Address **12**

Best Number/Time to Contact **13**

- 9. Home Phone
- 10. Cell Phone
- 11. Work Phone
- 12. Email Address
- 13. Best #/Time to Contact

Release Available? **14**

Release Start Date **15**

Release End Date **16**

Notes (Record any limitation to the release of information in this Notes field.) **20**

Legal Guardian? **17**

Emergency Contact? **18**

Next of Kin? **19**

- 14. Release Available
(3 Choices-Full, Limited, Verbal)
- 15. Release Start Date
- 16. Release End Date
- 17. Legal Guardian
- 18. Emergency Contact
- 19. Next of Kin
- 20. Notes: **(if Limited or Verbal field becomes required)**

Entry Date

Relationships

Submit

Click **“Submit”** to save form

Avatar Updating Client Demographics –Admission (Outpatient)

Client demographics updates are done utilizing the Admission Outpatient Form – (Demographics section)

The screenshot shows the Avatar Admission Outpatient Form (Demographics section) with 26 numbered red circles highlighting specific fields. The fields are:

- Client Last Name (TESTONE)
- Client First Name (TEST)
- Client's Middle Initial
- Suffix (V)
- Client's Address - Street (NOT a PO Box) (1235 APPLE ST APT 12)
- Client's Address - Zipcode (94403)
- Client's Address - City (SAN MATEO)
- Client's Address - County (SAN MATEO)
- Client's Address - State (CALIFORNIA)
- Client's Home Phone (650-573-0000 X - 1234)
- OK to contact/leave message (Home Phone) (Yes)
- Client's Work Phone (650-573-2525)
- OK to contact/leave message (Work Phone) (No)
- Client Declined To Provide Information On The Following (Ethnic Origin checked)
- Client's Cell Phone (650-573-3400)
- OK to contact/leave message (Cell Phone) (Yes)
- Primary Phone (Home Phone selected)
- Maiden Name (TESTSINGLE)
- Marital Status (Married)
- Occupation (Machine Operators And Tenders)
- Employment Status (Part time <35hrs per wk (nonco...))
- Education (20+ Years)
- Client's Email Address (testonetest@gmail.com)
- Client Admission Packet Preference (E-mail selected)
- Date Admission Packet Distributed (01/01/2001)
- Smoker (Unknown If Ever Smoked)
- Smoking Status Assessment Date - Enter 01/01/2001 (01/01/2001)
- Alias (TESTING)

1. Client Last Name (**auto populated**)
2. Client First Name (**auto populated**)
3. Client Middle Initial
4. Suffix (**if applicable**)
5. Client's Address
6. Client's Zipcode
7. Client's City
8. Client's County
9. Client's State
10. Client's Home Phone
11. Ok to contact
12. Client's Work Phone
13. Ok to contact
14. Client's Cell Phone
15. Ok to contact
16. Primary Phone
17. Maiden Name (**if applicable**)
18. Marital Status
19. Occupation
20. Employment Status
21. Education
22. Email
23. Client Admission Packet Preference
24. Date Admission Packet Distributed
25. Smoking Status
26. Smoking Status Assessment Date (enter 01/01/2001)
27. Alias (**8 available**)

Use this field to enter ALIAS information only



Avatar

Episode Closing

Episode Closing - Discharge (Outpatient)

Chart | Discharge (Outpatient) | +

Discharge
Demographics

Submit

📄 🗑️ 🗨️
❌ 🌐 ⭐

Online Documentation

Episode Number: 82

Date Of Discharge: 08/09/2018 * T Y

Discharge Time: 09:54 AM Current H M AM/PM

Discharge Day Of Week: THURSDAY

Length Of Stay: 418

Type Of Discharge: Administrative Discharge

Discharge Practitioner:

Discharge Remarks/Comments

Hospital Discharge Instructions

Discharge Client Living Arrangement

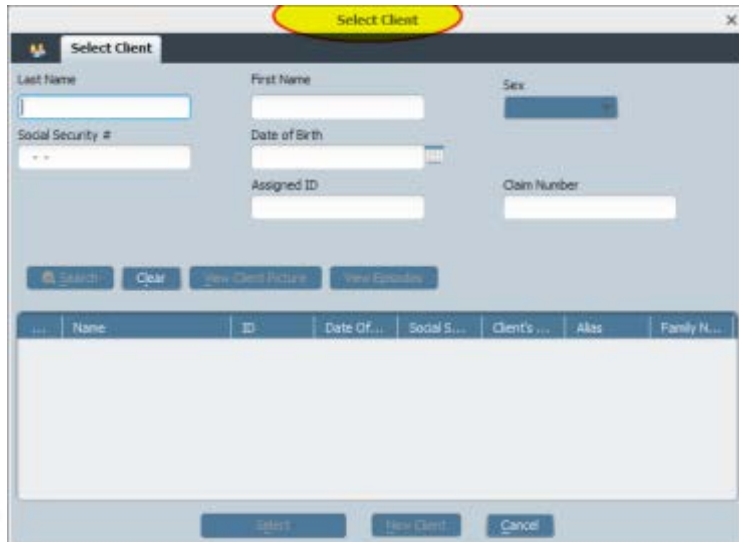


Red=Required fields

Avatar Episode Closing - Discharge (Outpatient)



Select **Discharge (Outpatient)** form Forms & Data

A screenshot of a "Select Client" dialog box. The title bar "Select Client" is highlighted with a yellow oval. The dialog contains several input fields: "Last Name", "First Name", "Sex" (a dropdown menu), "Social Security #", "Date of Birth", "Assigned ID", and "Claim Number". Below the fields are buttons for "Search", "Clear", "View Client Picture", and "View Episodes". At the bottom, there is a table with columns: "Name", "ID", "Date Of...", "Social S...", "Client's ...", "Alias", and "Family R...". Below the table are buttons for "Select", "New Client", and "Cancel".

In the Select Client screen, enter the client name or ID, and **select**. Click **Select**.

Avatar Episode Closing - Discharge (Outpatient)

The screenshot shows the 'Discharge (Outpatient)' form in the Avatar system. The form is divided into several sections:

- Demographics:** Includes a 'Submit' button and a red arrow pointing to it.
- Discharge Information:**
 - Episode Number:** 82
 - Date Of Discharge:** 08/09/2018 (1)
 - Discharge Time:** 09:54 AM, Current (2)
 - Discharge Day Of Week:** THURSDAY (3)
 - Length Of Stay:** 418 (4)
 - Type Of Discharge:** Administrative Discharge (5)
 - Discharge Practitioner:** (6)
- Discharge Remarks/Comments:**
 - Discharge Remarks/Comments:** (7)
 - Hospital Discharge Instructions:** (8)
 - Discharge Client Living Arrangement:** (9)

1. In the Date Of Discharge field, enter the date the client will be discharged.
2. In the Discharge Time field, enter the discharge time. Use Current if specific time is not required
3. The Discharge Day Of Week field shows the discharge day **(will pre-populate)**
4. The Length Of Stay field shows the episode length in days **(will pre-populate)**.
5. In the **Type of Discharge** field, select the discharge type. **(Required)**
6. In the **Discharge Practitioner** field, enter the practitioner name or ID, and select. **(Required)**
7. In the Discharge Remarks/Comments field, enter discharge comments or observations **(if applicable)**.
8. In the Hospital Discharge Instructions, enter any comments **(if applicable)**.
9. Select, Discharge Client Living Arrangement
10. Update Client Demographics if at discharge they have changed.

When finished, click **Submit**.