

## Avatar NX Updates and Tips

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## Section 1

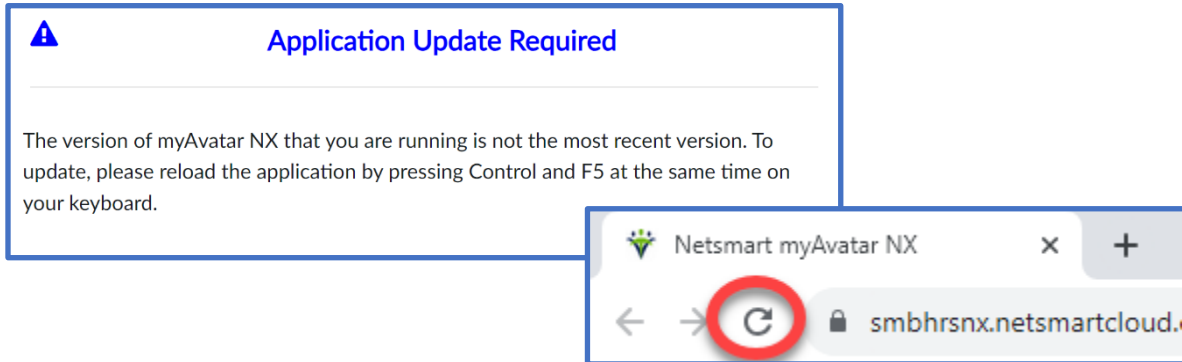
# Avatar NX: The Basics

- [Accessing Avatar](#)
- [Menus and Task Bars](#)
- [Customizing Your Views  
\(including Widgets\)](#)
- [Appointment Calendars](#)
- [Notes Features in NX](#)
- [Frequently Used Forms](#)

# Accessing Avatar NX

## 1. “Application Update Required” Notice

If you see this pop up and pressing the “Control” and “F5” button does not work, simply click the refresh button on your internet browser and Avatar NX should now be accessible.



## 2. Logging In To Avatar NX

We have received a number of requests for support in logging-in where it turned out that the “fix” was very simple!

Please make sure that your log-in screen contains all of the information shown in the screen shot to the right.

- Please make sure that **System Code** field is set to the System Code you were assigned (e.g., LIVE, LIVESMMH, LIVEEC, etc.). If you are unsure of what code you were assigned, contact BHRS IT.

If you still have trouble logging in, please contact BHRS IT for support.

The screenshot shows the login interface for 'Netsmart myAvatar NX'. It features a dropdown menu for 'System' set to 'SMBHRS LIVE'. Below it are fields for 'System Code' (containing 'LIVE'), 'Username' (with a placeholder 'Enter Username'), and 'Password' (with a placeholder 'Enter Password'). A blue 'Login' button is at the bottom. The labels 'System Code', 'Username', and 'Password' are highlighted in yellow.

that

# Menus and Task Bars

## 3. What are the different menu bars and tasks bars available to quickly find forms?

View Tab	(1) <a href="#">Search Bar</a>	(2) <a href="#">My Favorites</a>	(3) <a href="#">Forms Menu</a>	(4) <a href="#">Activity Panel</a>
	Available either on top left of middle center of screen, depending on which view you are in.	Left Side of Screen in Forms	Documentation Tab	Activity Panel on right side of window. Can view To Dos, Appointments, List of Open Forms, and Widget menu.

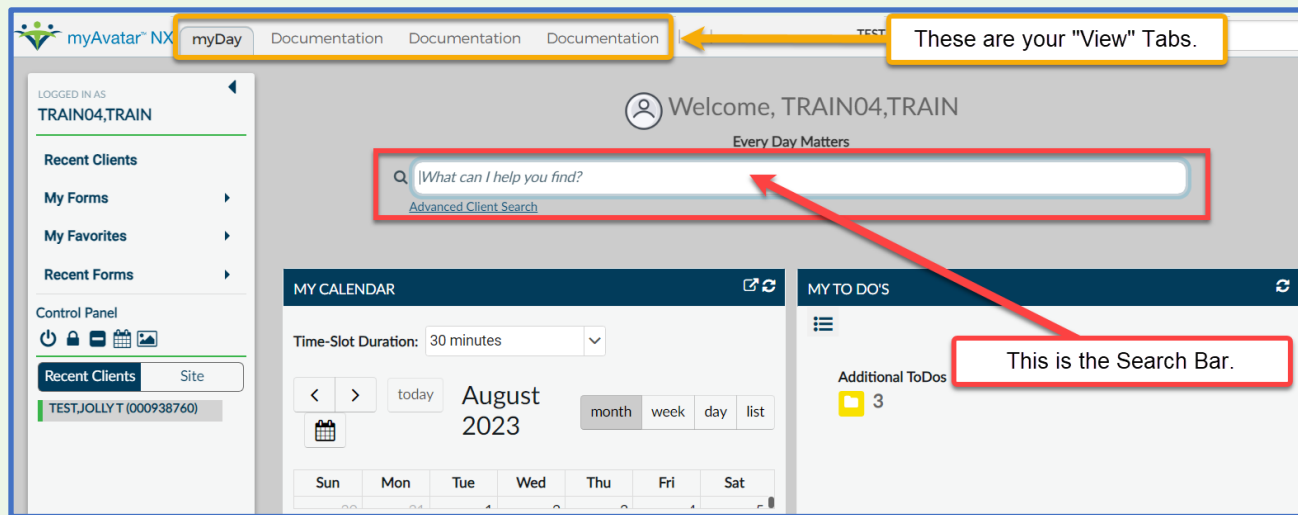
The screenshot displays the myAvatar NX interface for a user named TRAIN04, TRAIN. The interface includes a top navigation bar with tabs for Documentation and Clinical. A central header shows patient information for TEST, JOLLY T (000938760). The main content area is divided into sections for Quality Management and Console Widget Viewer. A table of forms is visible, with columns for Form Description, Episode, Date, Time, Data Entry By, and Workfl Status. The table contains two rows of data:

Form Description	Episode	Date	Time	Data Entry By	Workfl Status
Client Treatment and Recovery Plan	84 (921400 DALY CITY YOUTH HEALTH CTR)	08/14/2	12:55 PM	TRAIN ID4	Draft
Mental Health Progress Note	22 (416800 EAST BAYSHO ADULT)	08/14/2	--	TRAIN ID4	Draft

Red callout boxes highlight the following features:

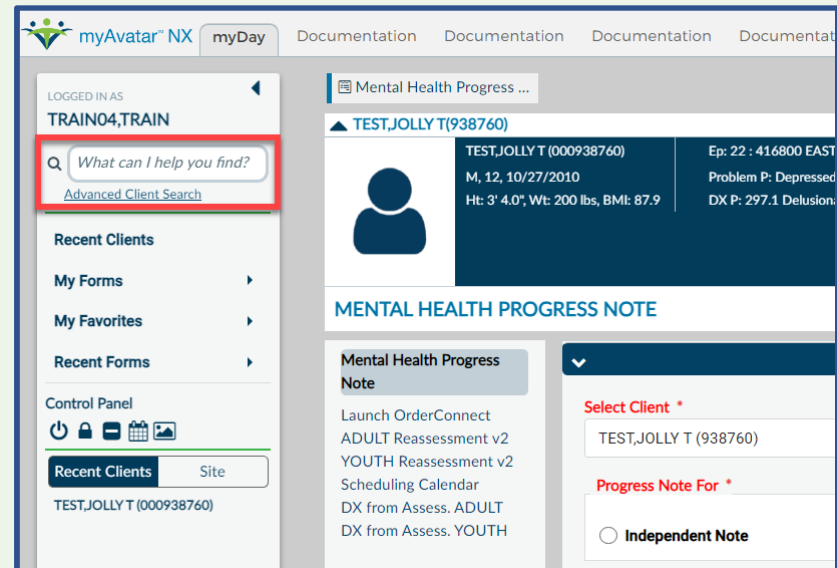
- (1) Search Bar:** Located at the top left of the interface.
- (2) My Favorites:** Located in the left sidebar under the 'Recent Clients' section.
- (3) Forms Menu:** Located in the central forms list, pointing to the 'Forms' tab.
- (4) Activity Panel:** Located on the right side of the window, showing 'TO DOS' and 'Client Treatment and Recovery' items.

## (1) Search Bar



The search bar is located in the center of your screen on your main 'myDay' page when you don't have any forms open.

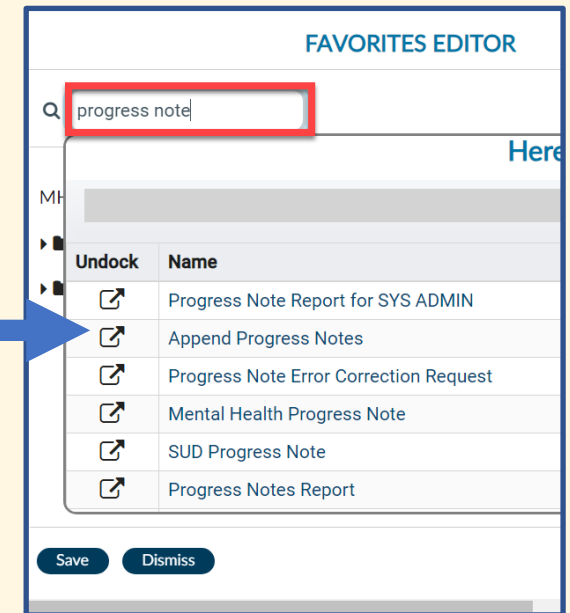
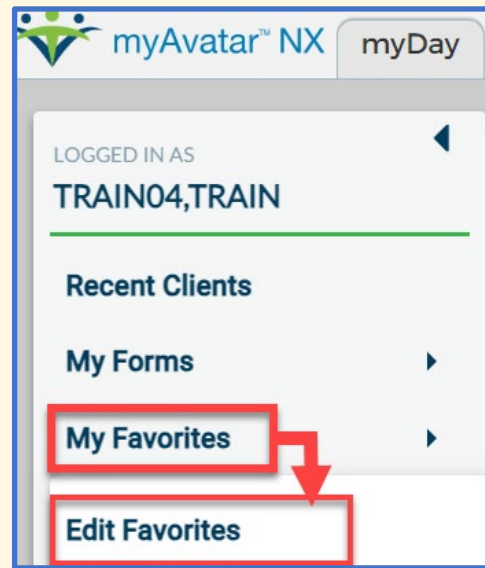
The search bar is on the top left side panel when you are in any of the other view tabs or have a form open.




## (2) My Favorites

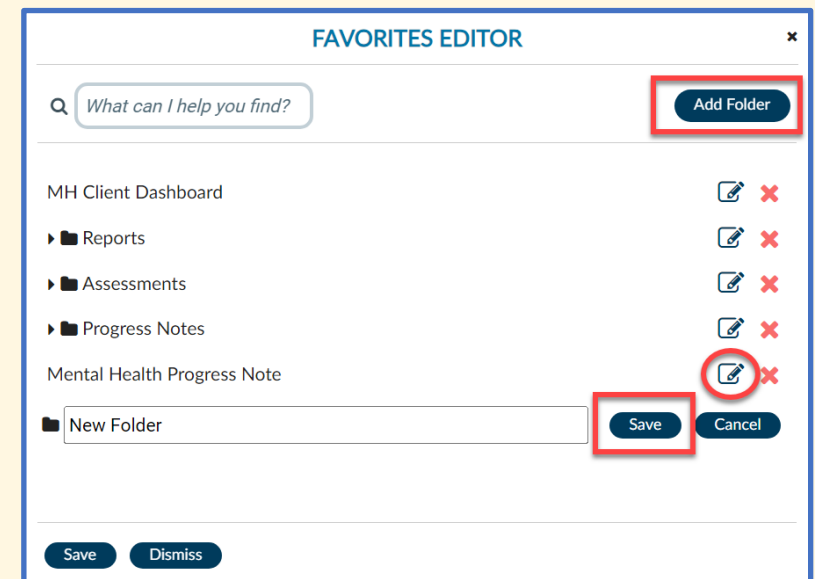
If you would like to save your frequently used forms in one easy place, we recommend using the “My Favorites” feature in your left hand Menu bar.

First, select “My Favorites” and then select “Edit Favorites” from the drop down menu that appears. A pop up window will appear which you can use to find forms/reports you would like added to your Favorites.



You can organize your forms by creating folders using the “Add Folder” feature on the top right of the pop up window. Use the “Edit”  button to rename the folder.

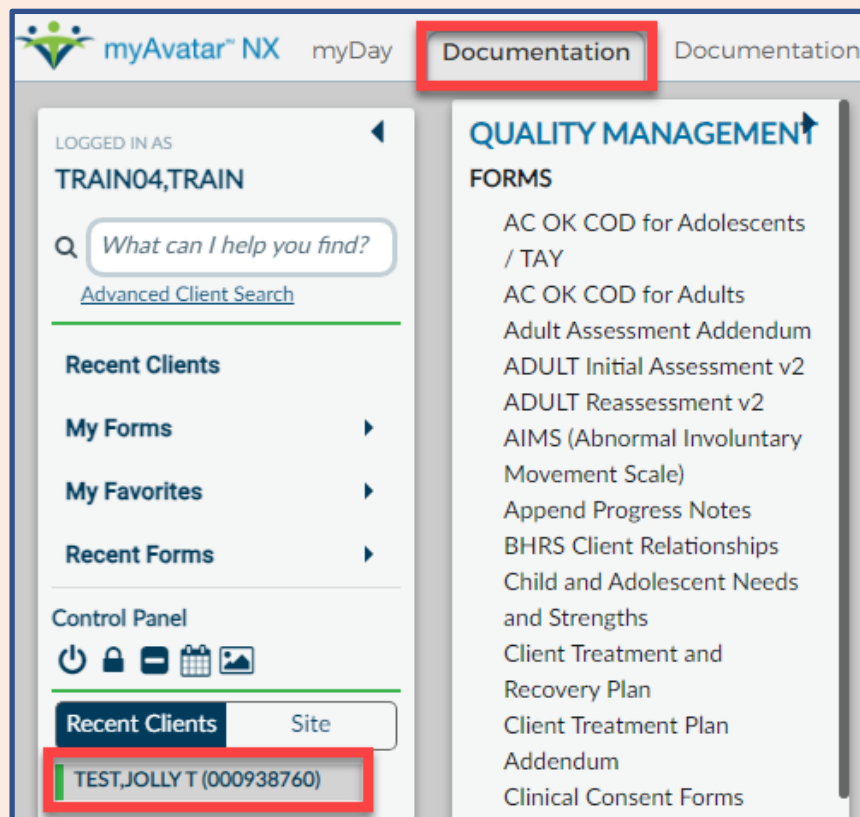
To reorganize items or put items into folders, simply click on the item you want to move and drag and drop to the desired location.



### (3) Forms Menu

In the old Avatar, there was a menu bar that listed all the documents available to view/open was always visible whenever the application was open. With Avatar NX, **the menu bar is still there** but it's only visible after you select a client.

To view the menu bar in Avatar NX, first click on the client, then click on the "Documentation" tab at the top of the screen (see screen shot to the right).



## (4) Activity Panel



Click this icon at the top right of your screen to open up a side bar that displays multiple items. This is your “Activity Pane.” You might or might not have a number circled in red. The number indicates how many forms you currently have opened.

Use these arrows to move the date forward or backward.



This icon opens up a view in your Activity Pane that shows your upcoming appointments by day. Use the arrows to move forward or backwards to view different days.



This icon opens up your To Do List in your Activity Pane. Here you will see items such as Progress Notes that were kicked back to you for editing by your supervisor, Draft items that have not yet been finalized, etc.



This icon that is on the top right of your Activity Pane is what you would click on to view your Current Activities in your Activity Pane. This window lets you see all the forms you currently have open.



## Customizing Your Views (including Widgets!)

### 4. Ways to adjust how Avatar NX looks.

Many staff are reporting that they are having trouble navigating Avatar NX because of how it looks. For instance, widgets are too small to easily view documents, the way the screen looks to them is different from what they saw in webinars and in this Avatar NX Updates Document, etc. Many of these problems can be addressed by adjusting your setting or personalizing your widgets. See the main ways to adjust your view settings below.

	<a href="#">Zooming In/Out</a>	<a href="#">Customizing Your Widgets</a>	<a href="#">Undocking Widgets</a>
Problem	<ul style="list-style-type: none"><li>• Can't see boxes to enter data</li><li>• Putting data in the text box, but it's not showing what I entered</li><li>• Words on form overlap.</li><li>• Form looks messy and disorganized. Text on form doesn't line up or skips to another line for no reason.</li><li>• My screen doesn't show the same button options that I have seen in examples (e.g., "Launch Report" doesn't show up on my console widget when I pull up an assessment form.</li></ul>	<ul style="list-style-type: none"><li>• Takes too much scrolling to get to the widget I need</li><li>• Too many widgets I don't need are on my screen</li><li>• Missing a widget that I should have</li></ul>	<ul style="list-style-type: none"><li>• Widget box is too small</li><li>• Want to view contents in widget while simultaneously exploring other information in client's chart.</li></ul>

## Zooming In/Out

Can't input date or time into date/time fields? Text overlapping in the window? Before submitting a support request to IT/QM, see if magnifying or reducing the size of the window/text solves the issue. For example:

The image shows a web browser window with a red circle around the maximize button. A red arrow points from this button to a text box that says "Click this square to make window bigger". Below the browser window, a text box reads: "Ah! 'Time' is not showing up and all the text is overlapping! It's hard to read! WHAT DO I DO?". A red arrow points from this text box to a zoomed-in view of a form field. In this zoomed view, the "Preadmit/Admission Date" field contains "07/13/2023" and the "Preadmit/Admission Time" field contains "02:51 PM". A red arrow points from the "Time" field in the zoomed view to a text box that says "After Re-Sizing!". To the right of the browser window, there are two text boxes. The first says: "Hold down **Ctrl** on your keyboard while rolling your **scroll button** on your mouse (see where arrow is pointing on image below). Scroll forward to make bigger and scroll back to make smaller." Below this text is an image of a mouse scroll button with a red arrow pointing to it and a "Ctrl" key. The second text box says: "OR... Hold down **Ctrl** while clicking the **+** or **-** keys on your keyboard." Below this text is an image of a "CTRL + +" key combination and a "CTRL + -" key combination.

Click this square to make window bigger

Ah! "Time" is not showing up and all the text is overlapping! It's hard to read! WHAT DO I DO?

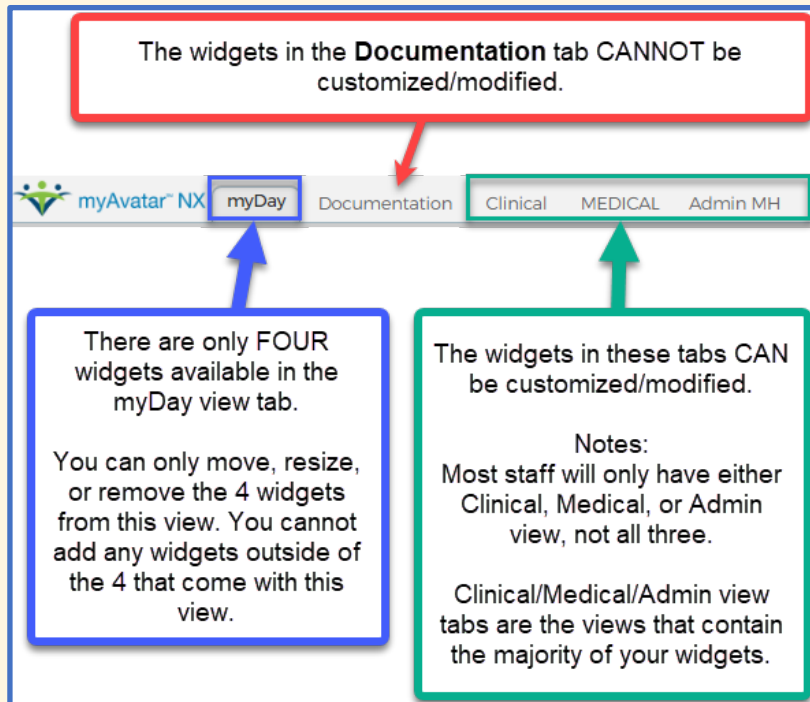
Hold down **Ctrl** on your keyboard while rolling your **scroll button** on your mouse (see where arrow is pointing on image below). Scroll forward to make bigger and scroll back to make smaller.

OR... Hold down **Ctrl** while clicking the **+** or **-** keys on your keyboard.

After Re-Sizing!

## Customizing Widgets

Good news! You can actually customize how the widgets are displayed on your screen on most of your Avatar NX view tabs. In order to ensure you are set to edit your widgets, click the “Customize” button on the top right of your NX window to “On.”

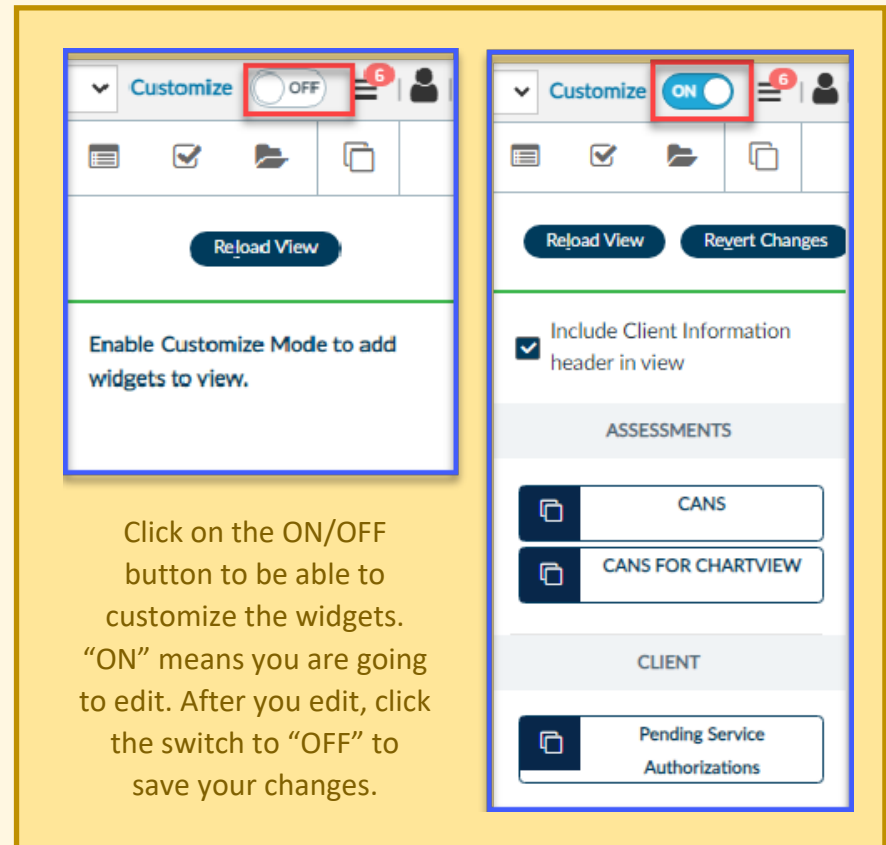


The widgets in the **Documentation** tab CANNOT be customized/modified.

There are only **FOUR** widgets available in the myDay view tab. You can only move, resize, or remove the 4 widgets from this view. You cannot add any widgets outside of the 4 that come with this view.

The widgets in these tabs **CAN** be customized/modified.

Notes:  
Most staff will only have either Clinical, Medical, or Admin view, not all three.  
Clinical/Medical/Admin view tabs are the views that contain the majority of your widgets.



Click on the ON/OFF button to be able to customize the widgets. “ON” means you are going to edit. After you edit, click the switch to “OFF” to save your changes.

You can now resize/move/add/delete widgets based on your preference! (See example on next page.)

To add a widget, simply click on the widget in the Activity Panel that you want and **drag and drop** it to your main view tab screen (Clinical/Admin/Medical/SUD) that contains all your widgets.

Sample Customization of Widgets: You can see that some were extended to be larger, and for those widgets that I would prefer to just expand into a separate window, I've made them small enough to just show the widget name and icons that allow me to refresh/delete/open in a separate window. [Once you're satisfied with the changes you have made, click the "Customize" switch to the "Off" position to save your changes.](#)


The screenshot displays a dashboard with several widgets. The 'PROGRESS NOTES' widget is the largest, showing filters for 'Previous days' (30) and 'Selection' (All Notes), with a message 'No information found.' Below it are 'UPCOMING APPOINTMENTS' and 'PAST APPOINTMENTS' widgets. The 'PAST APPOINTMENTS' widget contains a table with the following data:

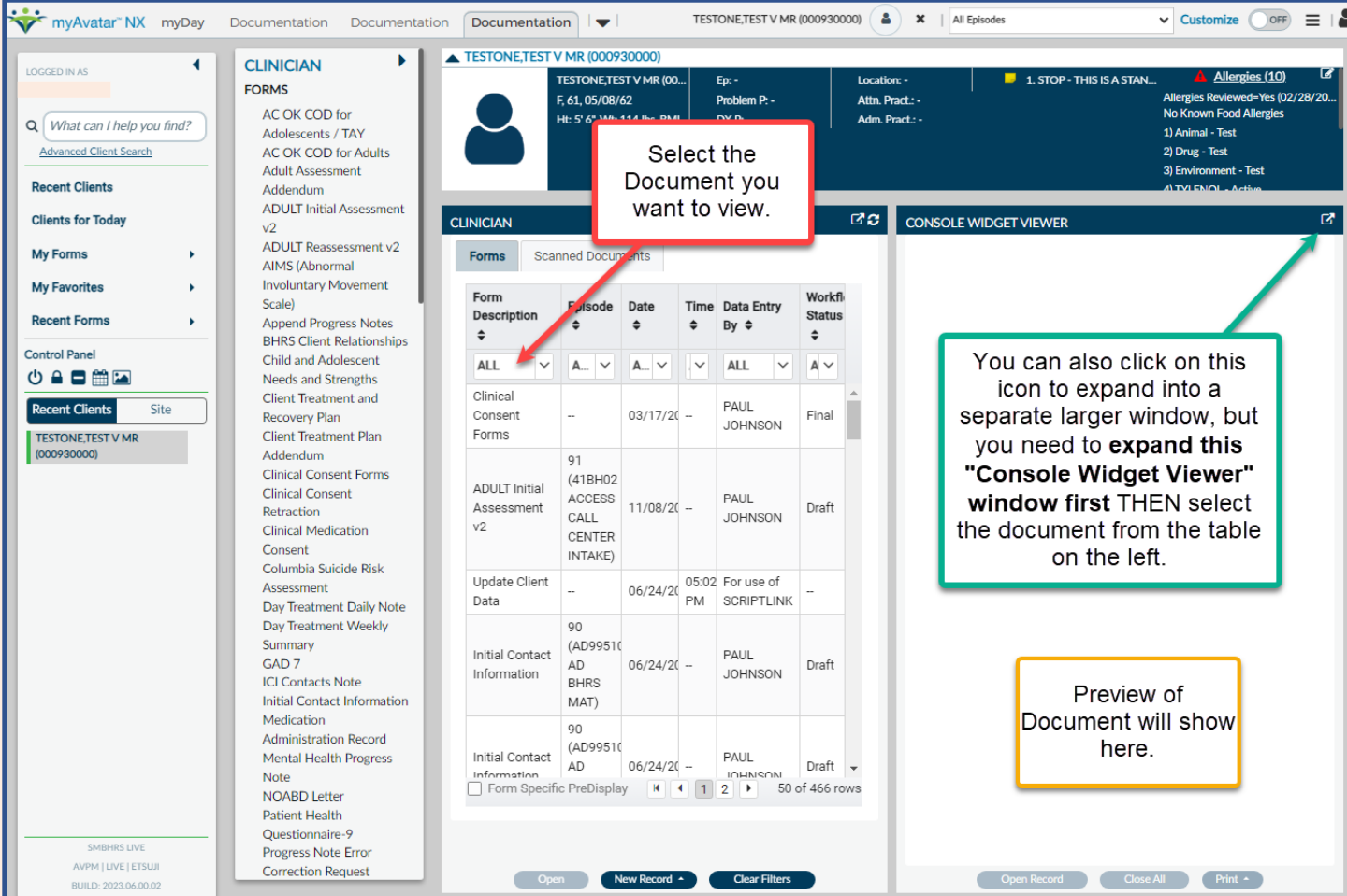
Date	Time	Service	Status	Site	Staff
2023-03-03	01:00 PM	REHABILITATION GROUP		SOUTH COUNTY ADULT	BLADE,MICHELLE NAKANO
2023-02-24	01:00 PM	REHABILITATION GROUP		SOUTH COUNTY ADULT	BLADE,MICHELLE NAKANO
2023-02-17	01:00 PM	REHABILITATION GROUP		SOUTH COUNTY ADULT	BLADE,MICHELLE NAKANO
2023-02-10	01:00 PM	REHABILITATION GROUP		SOUTH COUNTY ADULT	BLADE,MICHELLE NAKANO
2022-12-16	01:00 PM	REHABILITATION GROUP		SOUTH COUNTY ADULT	BLADE,MICHELLE NAKANO
2022-12-16	01:00 PM	REHABILITATION GROUP		SOUTH COUNTY ADULT	BLADE,MICHELLE NAKANO

At the bottom, there are several smaller widgets: 'ADMIN PAPER CONSENT TRACKING', 'CLINICAL CONSENT FORMS TRACKING', 'DX FOR CURRENT ASSESSMENT V2', 'MEDICATIONS', 'TREATMENT PLAN DUE CHARTVIEW', and 'SERVICES - LAST 7 DAYS'. Each widget has a 'Customize' icon (a square with a refresh, delete, and open symbol) in its top right corner.

For a video demo of how to customize widgets, view the "Customizing Widgets" module in the Avatar NX training curriculum in the LMS.

## Undocking Widgets

If you want to view a form in the undocked / expanded Console Widget Viewer, **undock it first** by clicking on the undocking icon  located on the top right corner of the widget, **THEN select the form**. See screenshot below.



The screenshot displays the myAvatar NX interface. On the left is a sidebar with navigation options like 'Recent Clients' and 'My Forms'. The main area shows a 'CLINICIAN' widget with a list of forms. A red box highlights a form in the list, with an arrow pointing to it and the text 'Select the Document you want to view.' To the right, the 'CONSOLE WIDGET VIEWER' is shown in an undocked state. A green box points to the undocking icon in the top right corner of the widget, with the text 'You can also click on this icon to expand into a separate larger window, but you need to **expand this "Console Widget Viewer" window first** THEN select the document from the table on the left.' Below this, a yellow box indicates 'Preview of Document will show here.' The table in the widget viewer has columns for Form Description, Episode, Date, Time, Data Entry By, and Workfl Status. The table contains several rows of form data.

Form Description	Episode	Date	Time	Data Entry By	Workfl Status
Clinical Consent Forms	--	03/17/20	--	PAUL JOHNSON	Final
ADULT Initial Assessment v2	91 (41BH02 ACCESS CALL CENTER INTAKE)	11/08/20	--	PAUL JOHNSON	Draft
Update Client Data	--	06/24/20	05:02 PM	For use of SCRIPTLINK	--
Initial Contact Information	90 (AD99510 AD BHRS MAT)	06/24/20	--	PAUL JOHNSON	Draft
Initial Contact Information	90 (AD99510 AD BHRS MAT)	06/24/20	--	PAUL JOHNSON	Draft

You can undock other widgets, not just the Console Widget Viewer, as long as it has the undock icon at the top right corner of the widget.

You can even undock multiple widgets at the same time. Skip to [here](#) for an example of how to do this

## Trouble Shooting: Document Does Not Show in Undocked Console Widget

If you get a blank window noting that “Only new documents will be displayed in this console viewer” don’t worry! It just means you need to click the document in the Forms table.

The screenshot displays the myAvatar NX interface for a user named TRAIN04, TRAIN. The main area shows a list of documents for client TEST, JOLLY T (000938760). A document titled "Mental Health Progress Note" is highlighted in blue. A green callout box with the text "SOLUTION: Click on the document in the Forms list that you want to view AFTER you undock the console widget. Your document should now show up in the undocked console widget viewer," has a green arrow pointing to the highlighted document. To the right, a "CONSOLE WIDGET VIEWER" window is open, showing a blank page with the text "Oh no! The document isn't showing in the Console Widget window when I undock it!" in a red box. The console viewer also displays the document's metadata: "Date Created: 09/28/2023 at 11:23 AM PDT", "Form Name: Mental Health Progress Note", "Client's Name: TEST, JOLLY T (000938760)", and "Client's DOB: 10/27/2010". The interface includes a top navigation bar with "Documentation" and "MEDICAL" tabs, and a right sidebar with "Allergies (17)" and "Alerts".

**SOLUTION:**

Click on the document in the Forms list that you want to view **AFTER you undock the console widget.**

Your document should now show up in the undocked console widget viewer,

**PROBLEM:**

Oh no! The document isn't showing in the Console Widget window when I undock it!

# Appointments / Calendars

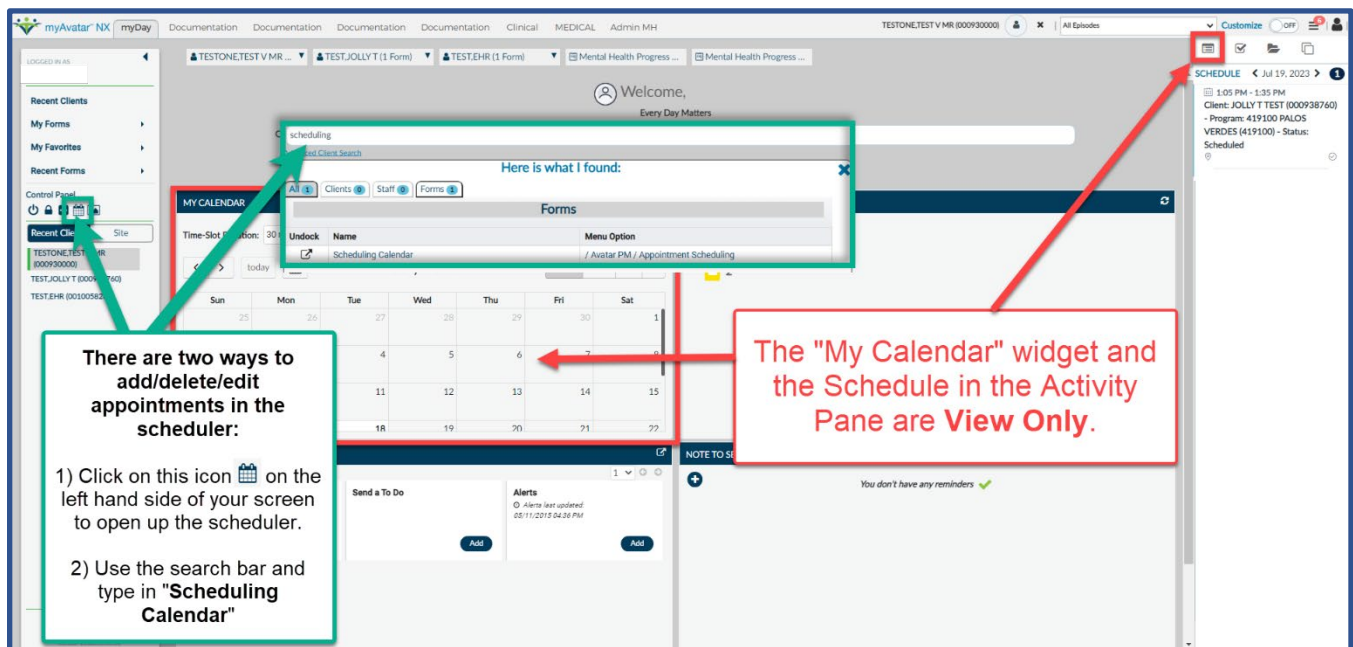
## 5. How do I link Outlook to my Avatar Calendar? I thought this was possible.

The Outlook Calendar cannot be linked to the Avatar Scheduling Calendar. This is something outside of QM and IT's hands as the vendor reported to us that this is not a feature that is available for use in NX.

## 6. I can't get my calendar widget to work! It won't let me enter any appointments!

The "My Calendar" widget on your myDay view tab only pulls information from the Scheduling Calendar so that you can view it. The actual Scheduling Calendar that you use to add/edit/delete appointments can be accessed 2 ways (see green boxes in screen shot below).

- 1) By searching for "Scheduling Calendar" in your search bar.
- 2) Clicking on the calendar icon on the left bar of your NX screen.



## 7. I can't schedule an appointment in my calendar for longer than 15 minutes!

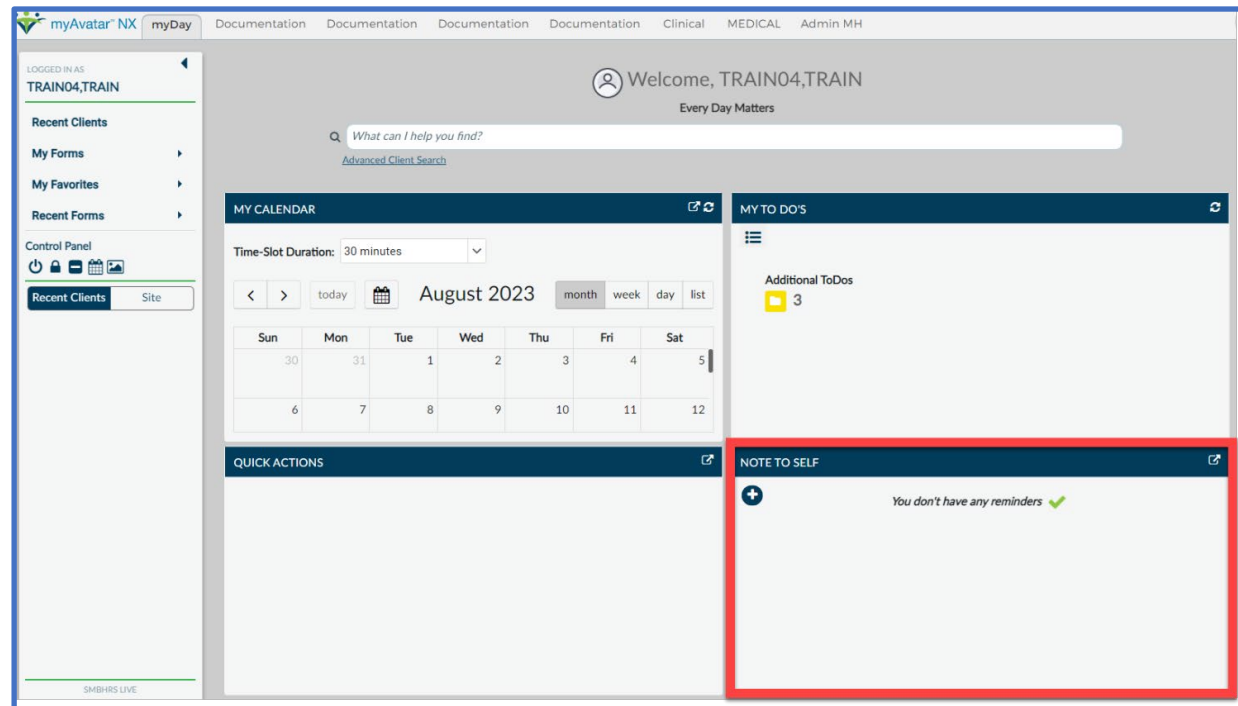
QM, IT, and MIS are aware of this issue and are working to address this issue as quickly as possible. Thank you to staff for alerting us of this! We will update staff as soon as a "fix" is available.

# Notes Features in NX

## 8. MyDay “Note to Self” versus embedded “Notes” in forms.

There are two types of “Notes” available in Avatar NX.

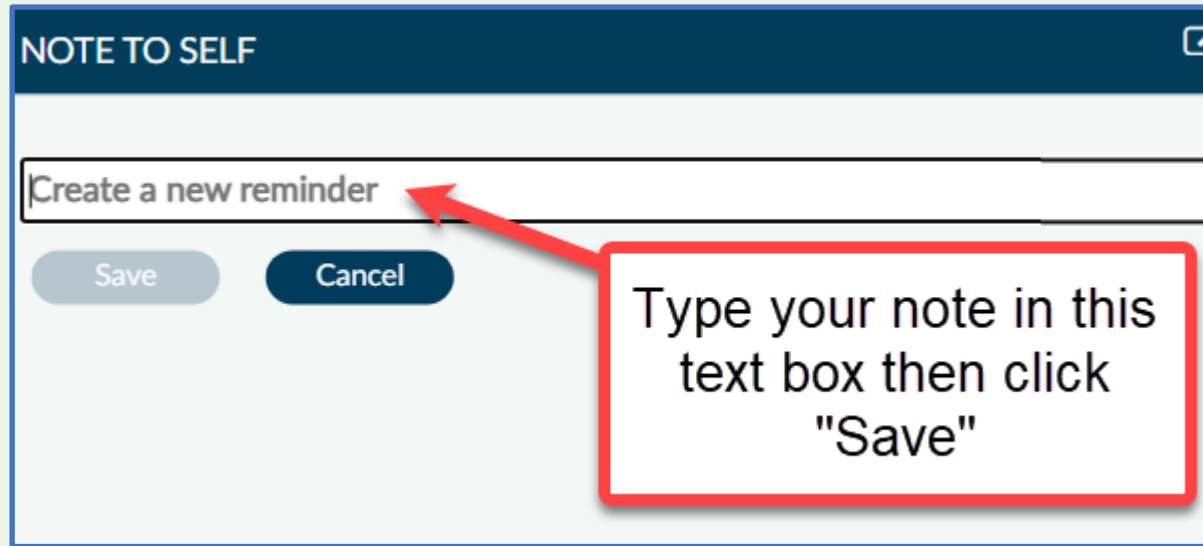
	“Note to Self”	“Notes” in Forms
<b>Location</b>	MyDay Tab	Available on some forms but not all
<b>Description</b>	Functions like a “post it note” in Avatar that only you can see.	Can be seen by all staff who have access to the form. Does not print out as part of the formal reports, but can be seen by anyone who has direct access to the form in Avatar (which in some cases can include auditors, etc.) These types of notes CANNOT be deleted.



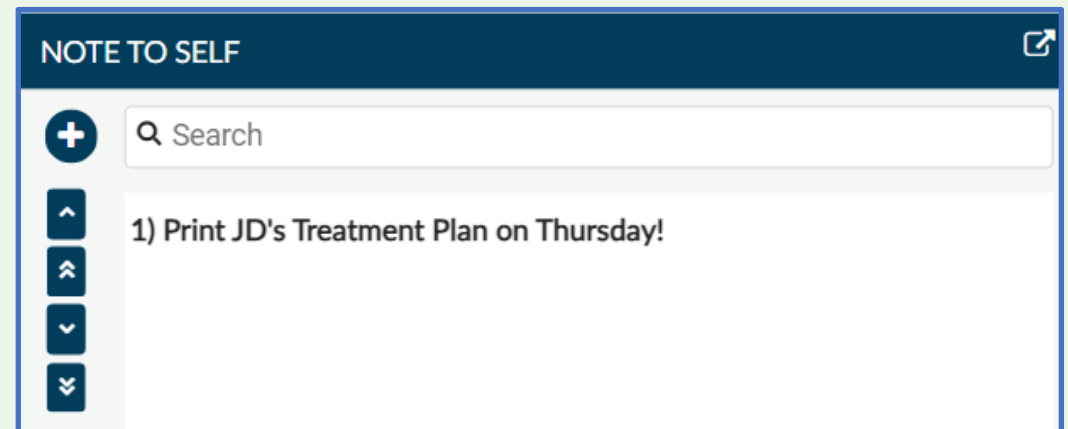


## Note to Self

The “Note to Self” widget in the MyDay tab is available for you to write a note to yourself. Only you are able to see this note and you can add, edit, or remove the item yourself.



A screenshot of the 'NOTE TO SELF' widget in edit mode. The title bar is dark blue with the text 'NOTE TO SELF' and a share icon. Below the title bar is a text input field containing the placeholder text 'Create a new reminder'. Below the text field are two buttons: 'Save' (light blue) and 'Cancel' (dark blue). A red arrow points from a red-bordered callout box to the text input field. The callout box contains the text: 'Type your note in this text box then click "Save"'. There is also a small share icon in the top right corner of the widget.



A screenshot of the 'NOTE TO SELF' widget in view mode. The title bar is dark blue with the text 'NOTE TO SELF' and a share icon. Below the title bar is a search bar with a magnifying glass icon and the text 'Search'. Below the search bar is a list of notes. The first note is '1) Print JD's Treatment Plan on Thursday!'. To the left of the list are five navigation icons: a plus sign, an up arrow, a double up arrow, a down arrow, and a double down arrow. There is also a small share icon in the top right corner of the widget.

## “Notes” in Forms

“Notes” feature is available in some forms, but it is different from the “Note to Self.” While the “Note to Self” can only be viewed by you, the “Notes” feature in forms can be seen by anyone who has access to form.

The screenshot displays a patient profile for TEST, JOLLY T (000938760) with details such as birth date (10/27/2010), height (3' 4.0"), weight (200 lbs), and BMI (87.9). The interface includes a 'CLINICAL CONSENT FORMS' section with buttons for 'Submit', 'Backup', 'Notes', 'Discard', and 'Add to Favorites'. A modal window titled 'Notes' is open, showing a list of notes: a new note from TRAIN04, TRAIN on 08/22/2023 at 08:57 AM, and an existing note from TRAIN04, TRAIN on 08/16/2023 at 09:06 AM. The modal contains a text area with the placeholder text 'Testing Where this Consent Form Note goes.' and buttons for 'File Note' and 'Cancel'. A red arrow points from the 'Notes' button in the main interface to the modal window.

**Important:**  
While the “Note to Self” in MyDay can be deleted, **these “Notes” in forms CANNOT be deleted!**

## Frequently Used Forms for MH Clinical Staff

### 9. Which form do I use?

In both the old Avatar and Avatar NX, forms that have been retired still show up on searches. These forms need to remain in the system due to the need to access historical information. However, the new format of NX has increased the confusion regarding which version of the forms to use.

Below is a list of CURRENT forms that should be used by staff when completing paperwork for current clients. Please search for the forms with the names below when completing common paperwork for clients.

Assessment Forms	Documentation Reports
ADULT Initial Assessment v2	All Adult Assessments V2
ADULT Reassessment v2	All Youth Assessments V2
Adult Assessment Addendum	Client Treatment Plan V2
YOUTH Initial Assessment v2	Progress Notes Report
YOUTH Reassessment v2	DX from Assess. ADULT
Youth Assessment Addendum	DX from Assess. YOUTH

Progress Note Forms	Treatment Plan Forms
Mental Health Progress Note	Client Treatment and Recovery Plan
Append Progress Note	Client Treatment Plan Addendum
Progress Note Error Correction Request	
Medication Administration Record	

Consent Forms	Assessment/Screening Tools
Clinical Consent Forms	Child and Adolescent Needs and Strengths
Clinical Medication Consent	PSC-35 ( <i>available with Generic Access widget</i> )
Clinical Consent Retraction	GAD 7
	Columbia Suicide Risk Assessment

Miscellaneous Forms	
CSI Assessment	Transfer/Discharge Request
NOAB Letter	
Contact Log	

Updated: 2/13/2024

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## Section 2


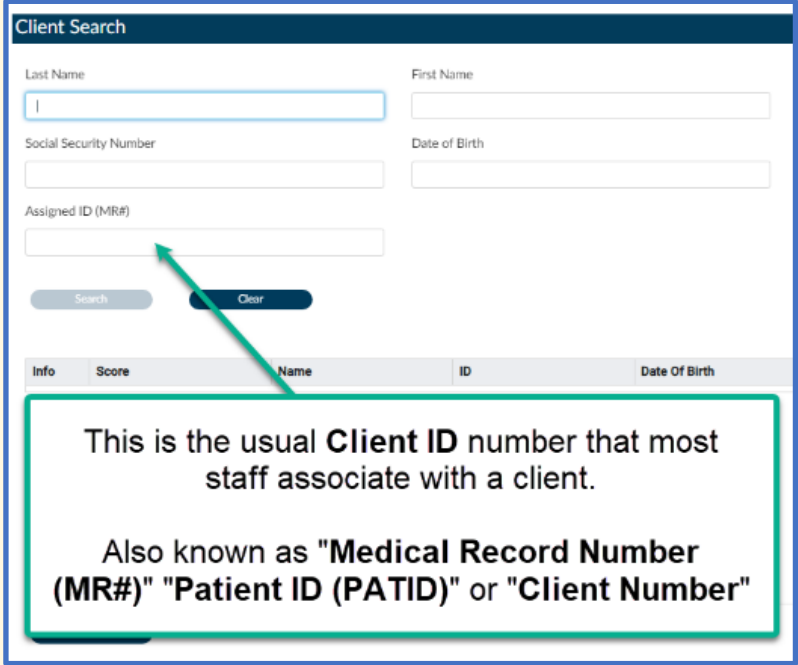
# Client's Charts

- [Finding Clients in NX](#)
- [Navigating Multiple Open Charts / Forms](#)
- [Consent Forms](#)
- [Signature Pads](#)
- [PSC-35](#)
- [Progress Notes](#)
- [Deleting Forms in Avatar](#)

# Finding Clients in NX

## 10. Finding Clients in NX

There are two main ways to search for clients in Avatar NX.

Basic Search Using Search Bar	Advanced Search
<ul style="list-style-type: none"> <li>Center of MyDay View Tab screen</li> <li>Left hand side panel of NX</li> </ul>	<ul style="list-style-type: none"> <li>Available on some forms but not all</li> </ul>
<p>Type your client's name or MR# in the search bar to pull up your client's name. Double click on their name and you will be able to view your client's chart.</p> <p>See <a href="#">Search Bar</a> section for information on where to find the search bar.</p>	<p>If you click on the "Advanced Client Search" link underneath the search bar, you will be able to search for clients using multiple criteria.</p> <p>When using the "Advanced Client Search" feature in Avatar NX, you'll see a field called "Assigned Client ID." This is the Medical Record number that staff associate with clients (MR#).</p>
	 <p>This is the usual <b>Client ID</b> number that most staff associate with a client.</p> <p>Also known as "<b>Medical Record Number (MR#)</b>" "<b>Patient ID (PATID)</b>" or "<b>Client Number</b>"</p>

# Opening Forms for Clients in Avatar NX

## 11. How do I open existing forms for clients in NX?

There are several ways to quickly view existing forms (both draft and finalized) through NX depending on if you're searching for scanned documents or forms created directly in Avatar. One is with the Forms Widget/Console Viewer and the other is via the Clinical Document Viewer.

### Viewing Forms/Documents via Console Widget Viewer

Forms widget and Console Widget Viewer which are both located in the **Documentation** view tab.

The screenshot shows the Avatar NX interface. On the left is the 'FORMS' widget with a list of form names. On the right is the 'Console Widget Viewer' showing a table of forms. A callout box with an orange border contains the following text:

You can narrow down the list that shows up in the Forms Widget by either:

- 1) Clicking on the form name in the menu on the left or
- 2) Selecting the form name from the drop down menu in the "Form Description Column" in the Forms widget.

This method allows you to view either

- **Scanned forms OR**
- **Forms that were created directly in Avatar.**

First, select either the "Forms" or "Scanned Documents" tab depending on the type of document you want to view.

Once you select the tab you want, you can further filter by clicking on the desired document on the forms menu or using the drop down menu in the "Form Description" column.

When you find your document on the list, double click it and it will show up in the Console Viewer to the right of the Forms Widget.

## Clinical Document Viewer

To view scanned documents, you can either use the Scanned Documents Tab in the Forms Widget described in the previous page, or you can use the Clinical Document Viewer. To access the Clinical Document Viewer, search for “Clinical Document Viewer” using the search field and complete the form.

Here is what I found:

All 2
Clients 0
Staff 0
Forms 2

	Forms	
Undo	Name	Menu Option
	Clinical Document Viewer	/ Avatar PM / RADplus Utilities / Document Management
	Clinical Document Viewer	/ Avatar CWS / Document Management

### CLINICAL DOCUMENT VIEWER

Search

Results

Select Search Criteria

**Select Type:**

**Select All or Individual Client:**  All  Individual

**Select Client:**

**User:**

**Document Status:**

Final  
 Void

**Program:**

ZNON-CONTRACT FFS HOSPITAL  
 ZWOMEN'S RECOVERY ASSOC end 4/30/14

**Episode:**

**Document Source:**

Batch Scanning Module  
 Document Routing  
 POS Scan / Import

Document Origination Date

Start:

End:

**Form Selection**

Entire Chart

Legal Medical Record

By Categories / Forms Select

**Form Restrictions**

Do Not Print

Do Not Release

Archived Documents

**Include**

**Exclude**

Process
Close

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CLINICAL DOCUMENT VIEWER

Search Results

View	Print	Client ID	Client Name	Episode	Linked Record	Document Description	Document Date	Document Status	Form Name	User	Do Not Release	Service Date
<input type="checkbox"/>	<input type="checkbox"/>	938760	TEST,JOLLY T	1		26.5 Consent to Assessmnt Plan (PV Only)	01/30/2018	Final	26.5 Consent to Assessmnt Plan (PV Only)	ALVIN AQUINO		
<input checked="" type="checkbox"/>	<input checked="" type="checkbox"/>	938760	TEST,JOLLY T	1		Client/Treatment Recovery Plan	02/18/2015	Final	Client/Treatment Recovery Plan	ALYS HERRING		
<input type="checkbox"/>	<input type="checkbox"/>	938760	TEST,JOLLY T	1		Client/Treatment Recovery Plan	02/18/2015	Final	Client/Treatment Recovery Plan	ALYS HERRING		

1 - 25 of 118

Document List

View Print Selected Void Close All Documents

Click on these boxes will activate the "View" and "Print Selected" buttons at the bottom of the screen.

CLINICAL DOCUMENT VIEWER

Search Results

Client/Treatment Recovery Plan

PDF 1.pdf

San Mateo County Behavioral Health & Recovery Services  
 BHRS MH Contractor Credentialing Form 2013-10  
 APPLICANT & AGENCY INFORMATION  
 Email to Alys Herring at aherring@smcgov.org  
 Information must be completed by applicant agency

<b>Direct Service Provider- Required:</b>	<b>Avatar Use - Required:</b>
Is this person a direct service provider?	Will this person use Avatar?
<input type="checkbox"/> No	<input type="checkbox"/> No
<input type="checkbox"/> Yes- New Biller/ Therapist # Needed	<input type="checkbox"/> Yes
<b>If Yes, complete this section, check both if both apply:</b>	
<input type="checkbox"/> UPDATE to current direct service	<input type="checkbox"/> New User-Full Avatar, Clinical role: write progress notes, treatment plans, other clinical documents

Document List TEST,JOLLY T (938760) - Client/Treatment Recovery Plan

View Print Void Close All Documents



## 12. How do I open new forms for a client?

For client specific forms, such as Progress Notes, Assessments, etc., you **must** first select a client. Then you can either search forms using the search box or use the “New Record” button in the forms widget in Avatar.

The screenshot displays the myAvatar NX interface. On the left, the 'Recent Clients' list includes 'TEST,JOLLY T (000938760)', which is highlighted with a red box. A red arrow points from this box to the 'Documentation' tab at the top of the main content area. Below the 'Documentation' tab, a list of forms is shown, with 'Mental Health Progress Note' selected. A green box highlights the 'New Record' button at the bottom of the form list. A red box highlights the 'New Record' button at the bottom of the page. A text box with a red border contains the following text: 'Make sure you select a client first, then go to the "Documentations" tab. Forms will not show if you do not have a client selected.'

LOGGED IN AS  
ERI TSUJII

What can I help you find?  
Advanced Client Search

Recent Clients

My Forms

My Favorites

Recent Forms

Control Panel

Recent Clients Site

TEST,JOLLY T (000938760)

CLINICIAN

FORMS

- AC OK COD for Adolescents / TA
- AC OK COD for Adults
- Adult Assessment Addendum
- ADULT Initial Assessment v2
- ADULT Reassessment v2
- AIMS (Abnormal Involuntary Movement Scale)
- Append Progress Note
- BHRS Client Relationships
- Child and Adolescent Needs and Strengths
- Client Treatment and Recovery Plan
- Client Treatment Plan Addendum
- Clinical Consent Forms
- Clinical Consent Retraction
- Clinical Medication Consent
- Columbia Suicide Risk Assessment
- Day Treatment Daily Note
- Day Treatment Weekly Summary
- GA07
- IGI Contacts Note
- Medication Administration Record

TEST,JOLLY T (000938760)

TEST,JOLLY T (000938760)  
M, 12, 10/27/2010  
Ht: 3' 4.0", Wt: 200 lbs, BMI: 87.9

Ep: -  
Problem P: -  
DX P: -

Location: -  
Attn. Prac: -  
Adm. Prac: -

CLINICIAN

Forms Scanned Documents

Form Description	Episode	Date	Time	Data Entry By	Workflow Status
Mental Health Progress Note	85 (Z41DT00)				
Mental Health Progress Note	57 (41011 NORTH COUNTY ADULT)	07/03/2023		TRAIN ID9	Draft

Open New Record Clear Filters

Open New Record Clear Filters

Make sure you select a client first, then go to the "Documentations" tab. Forms will not show if you do not have a client selected.

For additional information on how to better utilize widgets to view forms, please click [here](#) to see how to edit your widgets.

# Navigating Multiple Open Charts / Forms in NX

## 13. How to Open Multiple Forms for the Same Client

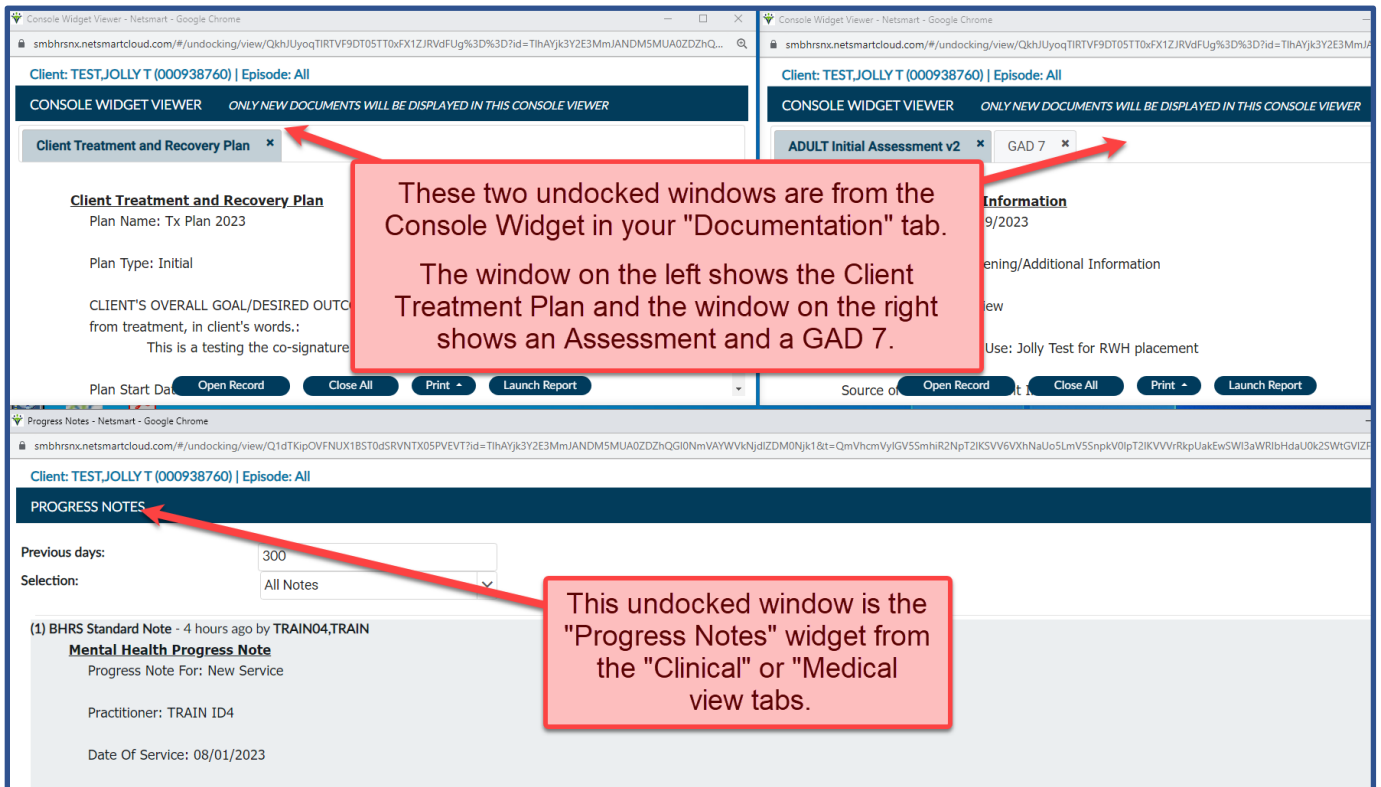
Sometimes you might be working on a client's chart and would like to view multiple documents for the same client simultaneously (e.g., while you are working on an assessment, you want to view the latest treatment plan, last assessment, and progress notes).

If you want to view multiple documents from the Console Widget, simply undock multiple Console Windows from the widget and then select the documents you want to view in the Console Widget using the forms widget.

For other documents, if they are available through your widgets you can undock each widget you need.

See [Undocking Widget section](#) for information on how to undock the widget.

Once you have your windows open, you can position and resize as you like. Screen shot below shows example of how 3 undocked widgets can be positioned on one screen.

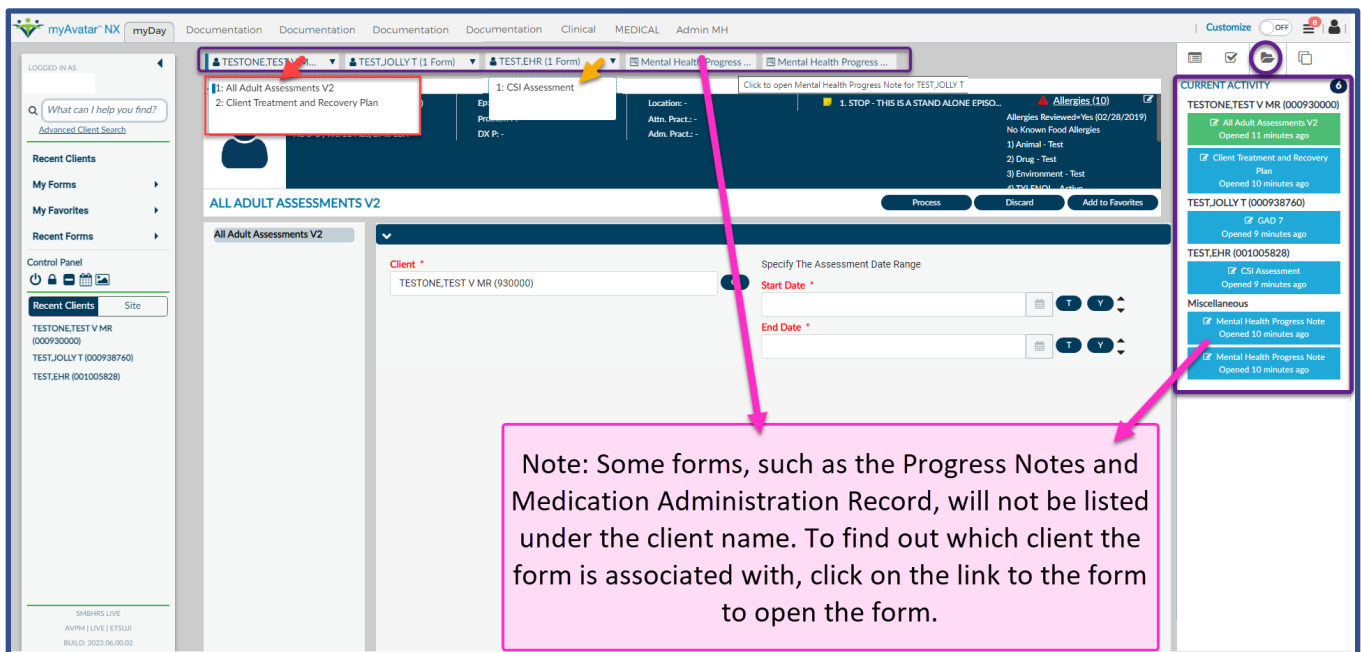


## 14. How to Open Multiple Charts/Forms for Multiple Clients in Avatar NX.

You have multiple ways to toggle between forms for different clients. However, we will show below the two easiest ways to do so.

You will see two areas of the Avatar NX screenshot below highlighted in purple boxes – one at the top of the screen and the other to the right of the screen. You can either click the box with the client name at the top of the NX window to see a drop down list of currently open forms for that client, or you can click on the open form using the Activity Pane to the right of your NX window.

Please note that some forms, such as the Progress Notes and Medication Administration Record, will not be listed in either the client drop down at the top or the under the client name in the Activity Pane. You will only be able to see which client each of those forms is for by opening the form (clicking on either the form link at the top or the form link in the Activity Pane).



The screenshot displays the Avatar NX software interface. At the top, a navigation bar includes 'myAvatar NX', 'myDay', and various menu options like 'Documentation', 'Clinical', 'MEDICAL', and 'Admin MH'. Below this, a client selection bar shows three active clients: 'TESTONE,TEST V MR (030000)', 'TEST,JOLLY T (1 Form)', and 'TEST,EHR (1 Form)'. A red box highlights the first client's name, and a yellow arrow points to the second client's name. The main content area shows a form titled 'ALL ADULT ASSESSMENTS V2' with a search bar and date range filters. On the right side, an 'ACTIVITY PANE' lists recent activities for each client, including 'All Adult Assessments V2', 'Client Treatment and Recovery Plan', 'GAD 7', 'CSI Assessment', and 'Mental Health Progress Note'. A pink box at the bottom contains a note: 'Note: Some forms, such as the Progress Notes and Medication Administration Record, will not be listed under the client name. To find out which client the form is associated with, click on the link to the form to open the form.'

# Consent Forms

## 15. Where can I find consent forms for clients?

Consent forms come in either two forms – as hard copies scanned into Avatar or as electronic versions that are entered directly into an Avatar form.

To the right are the names of the current forms in Avatar that staff should use to record client’s consents in an electronic format. The “Clinical Consent Retraction” form should be used when an existing consent needs to be retracted.

- Clinical Consent Forms
- Clinical Medication Consent
- Clinical Consent Retraction

Please note that it is not required for consent forms to be completed via the Clinical Consent forms. PDF versions of the forms may continue to be printed out and scanned into Avatar.

To view already completed consent tracking widgets in Avatar, use the consent widgets that are available in your Clinical/Medical/Admin view tabs.

The **Admin Paper Consent Tracking** widget includes the consent forms that have been scanned into Avatar.

The **Clinical Consent Forms Tracking** widget includes the consent forms that were completed directly in Avatar using the Clinical Consent forms.

ADMIN PAPER CONSENT TRACKING							
Patient Name	Consent_Type	Retracted Date	Release for Name/Agency	Release for	Initial Date of Consent	Restricted Status	Consent Exp Date
TEST, JOLLY T	Consent to Release Information		Edgewood	AOD programs	04/22/2021		04/21/2024
TEST, JOLLY T	Treatment Consent				08/23/2018		
TEST, JOLLY T	Medication Consent				08/24/2018		
TEST, JOLLY T	Cell Phone Agreement				02/09/2022		02/01/2033
TEST, JOLLY T	Consent to Electronic Communications				03/18/2023	Yes	
TEST, JOLLY T	Medication Consent				07/25/2019		

CLINICAL CONSENT FORMS TRACKING							
Patient Name	Consent_Type	Retracted Date	Release for Name/Agency	Release for	Initial Date of Consent	Restricted Status	Consent Exp Date
RUSSELL, CHARLENE L	Release of Information		Anthony IHSS Staff	Coordinating Services/Referrals	10/19/2022		10/19/2025
WAN, KELLY	Release of Information		Ashley Burns / Brilliant Corners	Coordinating Services/Referrals	08/14/2023		08/14/2026
TEST, JOLLY T	Consent to Treatment				12/20/2022		
TEST, JOLLY T	Cell Phone Agreement				12/16/2022		

Alternatively, you can use the Forms widget and Console Widget Viewer which are both located in the Documentation view tab to scroll through individual Clinical Consent Forms. You can filter by clicking on the desired document on the forms menu or using the drop down menu in the “Form Description” column.

The screenshot displays a clinical information system interface. On the left, a sidebar lists various forms under the heading "FORMS". The "Clinical Consent Forms" option is highlighted with a red box. The main area shows a patient profile for "TEST, JOLLY T (000938760)" with personal and medical details. Below this, a table lists "Clinical Consent Forms" with columns for Form Description, Episode, Date, Time, Data Entry By, and Workflow Status. The first row is highlighted. To the right, the "CONSOLE WIDGET VIEWER" displays the details of a selected form, including consent questions and answers.

Form Description	Episode	Date	Time	Data Entry By	Workflow Status
Clinical Cons...	ALL	ALL	A...	ALL	A...
Clinical Consent Forms	-	08/14/2023	-	SAMANTHA ELIZABETH VIGIL	Final
Clinical Consent Forms	-	04/13/2023	-	ANNINA LEE ALTOMARI	Final
Clinical Consent Forms	-	04/13/2023	-	ERI TSUJII	Final
Clinical Consent Forms	-	03/18/2023	-	ANNINA LEE ALTOMARI	Final
Clinical Consent Forms	-	01/12/2023	-	ANNINA LEE ALTOMARI	Final
Clinical Consent Forms	-	01/03/2023	-	ANNINA LEE ALTOMARI	Final
Clinical Consent Forms	-	12/20/2022	-	ANNINA LEE ALTOMARI	Final
Clinical Consent	-	12/16/2022	-	ANNINA LEE	Final

**Consents**

Is this a Release of Information?: Yes

Consent Form(s): Release of Information

Was this contact in English?: Yes

Language for Printed Version (If language is not available for selected consent type, select English) : English

This provider reviewed this consent form with the Client or Parent/Guardian/Representative : by phone

Person authorizing consent: Client

Date of Client or Parent/ Guardian/ Representative Consent: 08/14/2023

The Client or Parent/ Guardian/ Representative authorized/approved this consent by? (If verbal consent ? include reason in General Comment box) : Verbal consent

The Client/Parent or Guardian was offered copy of this form: Declined copy

# Signature Pads

## 16.ISSUE RESOLVED: Signature Pad was not working in Avatar NX

**Issue Reported:** Staff were not able to use the Signature Pad when using Avatar NX.

**Solution:** A software updated was needed to resolve this issue. The Signature Pad should now work in Avatar NX. *If you are still experiencing issues, please submit a ticket through Service Now by following the instructions below:*

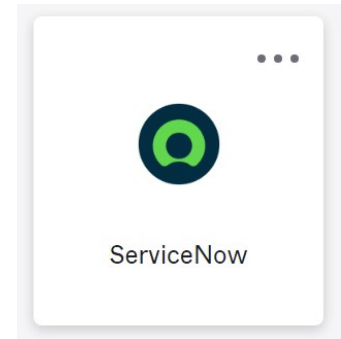
There are two steps to getting a signature pad to work with AVATAR NX.

- Step 1)** Open a **Service Now** ticket in OKTA. Go to **“Request Services”** and then **“Applications & Software”** and then **“Application Access.”**

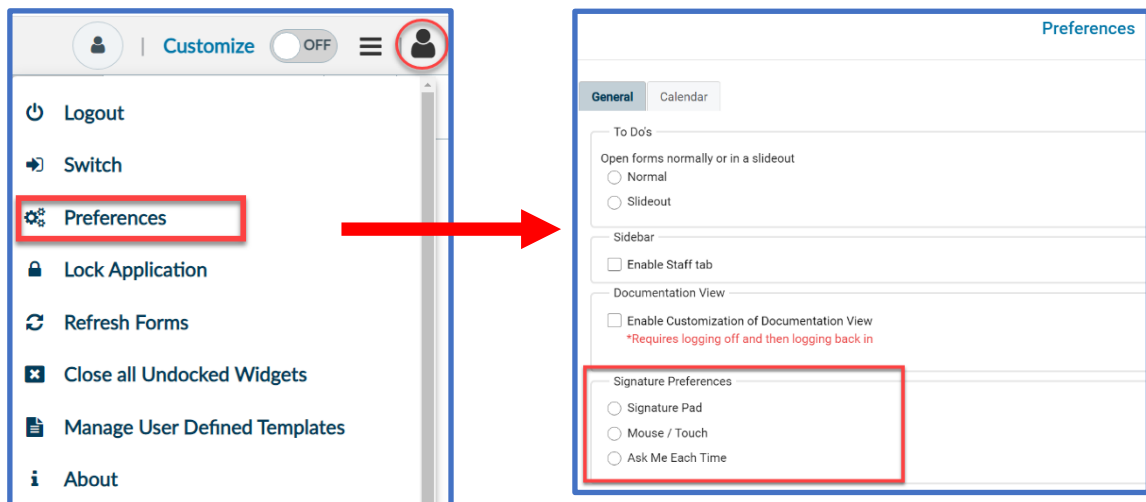
Enter the requested information. The Application Name is **“other application”** and the description is something such as **“Please install the new file (.exe) for the Topaz signature pad driver.”**

IT will contact you in the next day or so and set up a time to install. It is estimated to take about 15 minutes and they will need the signature pad model number.

You may need to reboot your computer after the installation.



- Step 2)** Set your AVATAR NX preferences. Go to the User Menu, select preferences. Under general preferences there is signature preferences. Select what works best for you signature pad; mouse/touch; or ask me each time. Images below.



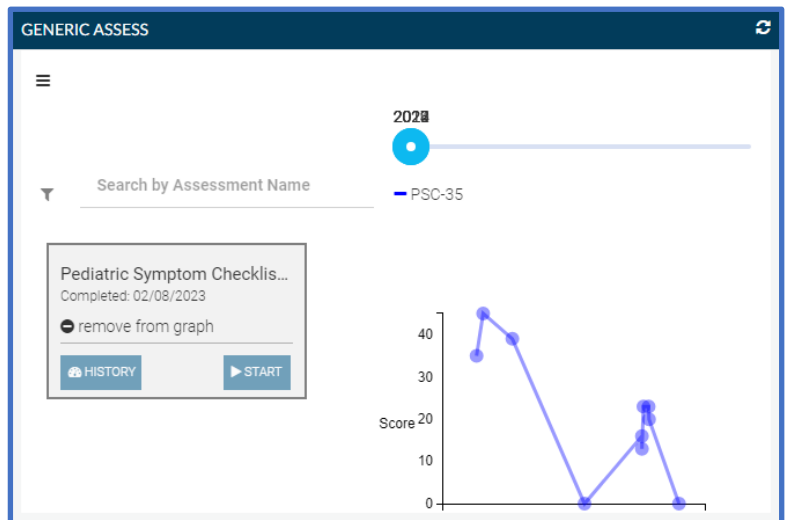
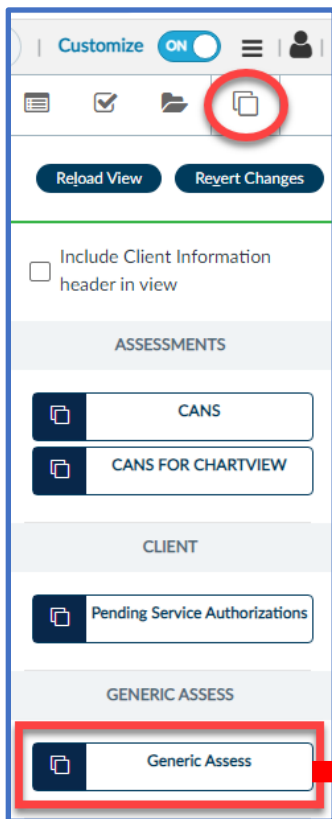
Once you have completed these two steps – the signature pad should work once again!

## 17. How do I find the PSC-35?



For both the old Avatar and Avatar NX, you would use the Generic Access feature to locate the PSC-35. The difference is that in NX you would find the Generic Access function through your Widgets in your Activity Panel (see screenshot below).

\*Note that if you do not have a client selected when you open the Generic Access widget, the widget will be blank.



Drag and drop into your main widgets view tab screen (Clinical/Medical) and you should now be able to see the PSC-35 through this "Generic Access" widget!

If you do not know how to add a widget, please see [the Customizing Your Views](#) section of this document.

# Progress Notes

## \*NEW\* 20. Same Day Same Service Progress Notes

BHRS continues to experience issues with getting reimbursed for services that are provided on the same day for the same client using the same service code because they are not being documented in the same progress note. As a reminder...

Under Payment Reform, all claims for the **same client** that are provided under **the same service code** by the **same provider** on the **same day** MUST be combined into **one progress note**.

Staff should leave notes in DRAFT and wait to finalize until the end of the day. Notes should be finalized within 3 days of the service.

If you finalized a note and realize you provided an additional service after finalizing the note, you will need to complete TWO forms in Avatar to correct this error:

- 1) **Append Progress Note:** Use this to add the narrative content to the note documenting the additional service you provided.
- 2) **Progress Note Error Correction Request:** Use this to add the minutes and/or any additional add on or prolonged service codes that will need to be added. Please see image below for how to fill out the form.

Please be advised that staff should get into the practice of leaving notes in draft to finalize later (within 3 business days) because of the burden it places on staff to fill out two forms to correct the error. Additionally, the correction process requires our billing department to stretch their resources to process these progress note error corrections.

The screenshot shows the 'PROGRESS NOTE ERROR CORRECTION REQUEST' form. At the top, there are buttons for 'Submit', 'Discard', and 'Add to Favorites'. Below that, the 'Original Note Information' section includes a search field with the text 'Jul 13 2023 -17CA-MEDICATION SUPPORT - LOC-OFFICE -67 mins by' and a 'NOTE ID' field with the value 'NOT66668.004, Jul'. A red box with an arrow points to the 'NOTE ID' field, containing the text 'Select This When Requesting Change to Add-On Code'. The 'Select Items to Change' section has two columns of checkboxes. The first column includes 'Location', '# of Clients in Group', 'Other Billable Service Time', 'Wrong Client', 'Wrong Episode', and 'Duplicate Entry'. The second column includes 'Service Code', 'Service Time Client Present in Person', 'Date of Service', 'Other Client's PHI Disclosure', 'Wrong Co-Practitioner', and 'Other'. A red box with an arrow points to the 'Service Code' checkbox, containing the text 'Select This When Requesting Change to Documentation Time or Travel Time (for services on or after 7/1/2023)'. Below the checkboxes are several input fields: 'NEW Date of Service', 'CORRECT Episode', 'NEW Location Code', 'NEW Service Time Client Present in Person (Min)', and 'CORRECT Client'. A green box with an arrow points to the 'Change Comments/Reason' field, containing the text 'For Progress Notes created on or after 7/1/2023, be sure to include details in the comments about the change you need to ensure that the changes that are made are accurate!'. Another green box with an arrow points to the 'Change Comments/Reason' field, containing the text 'For services that need an add-on code added/removed/modified, OR if you need to change the primary service code but don't need to change the add-on code -- specify what the primary service code should be including the time for that service, and specify what the add-on code should be, including the time.'. A third green box with an arrow points to the 'Change Comments/Reason' field, containing the text 'For services that need adjustments made to the documentation time or travel time -- include what each time should actually reflect, even if you're only editing one or the other.'

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## 21. Location Code keeps defaulting to OFFICE!

It seems that the location code is **defaulting back to OFFICE** if the location code is filled out **before** other fields in the progress note are filled out.

We understand how this negatively impacts staff workload and the accuracy of the client's progress note information, so we continue to work with IT to see if we can find a solution for this issue.

Staff do not need to comb through ALL of their previous notes to check the location code. However, if staff notice that a finalized note has the incorrect location code, please go ahead and submit a **Progress Note Error Correction Request** form in Avatar to correct the location code. Or if you receive a message from the Billing Department (a.k.a. MIS) because they caught an error in the location code, please review the note and make the correction if upon your review you determine that the wrong location code was saved.

The screenshot shows the Avatar system's progress note form. A red callout box with a red border and a red arrow pointing to the 'Location' dropdown menu contains the text: "Fill the 'Location Code' AFTER you have completed all other items in this section of the progress note." The form includes fields for 'Progress Note For' (Independent Note or New Service), 'Type of Progress' (Standard Pro, Treatment Pl, or Treatment Pl), 'Did client participate?' (Yes or No), 'Did caregiver participate in appointment?' (Yes, No, or Client is not dependent adult or minor), 'Practitioner' (ID4, TRAIN (000066)), 'Date Of Service', 'Service Charge Code', 'Select Draft Note To Edit', 'Service Program', 'Location', 'Service Time', 'Documentation Time', 'Travel Time', 'Other Billable Time', 'Service Duration', and 'Other Non-Billable Time'.

While we continue to work on a fix to this issue, we recommend that you fill out the "Location Code" **after** you have filled out all of the other parts of the top section of the progress note.

In our testing, it seems this workaround works, but if you are still experiencing issues even after this workaround, please let us know by emailing [HS\\_BHRS\\_ASK\\_QM@smcgov.org](mailto:HS_BHRS_ASK_QM@smcgov.org).

## 22.Co-Practitioner Section in Progress Note

Due to technical issues with being able to add add-on codes to co-practitioners using the co-practitioner fields, we discontinued the use of the co-practitioner section of progress notes with the introduction of Payment Reform on 7/1/2023. For service on or after July 1, 2023, in order to successfully bill services staff need to complete separate progress notes when more than one provider will be billing for the same appointment for any service type (including group). This Co-Signature section of progress notes will disappear as of October 13, 2023.

The screenshot shows the 'MENTAL HEALTH PROGRESS NOTE' form in a 'Draft' state. A red box highlights the 'Co-Practitioner' section, which includes fields for 'Co-Practitioner', 'Co-Practitioner Service Time', 'Co-Practitioner Documentation Time', 'Co-Practitioner Travel Time', 'Co-Practitioner Other Billable Time', 'Co-Practitioner Duration', and 'Co-Practitioner Non-Billable Time'. A text box within the red box states: 'This section should not be used for any services provided on or after July 1, 2023. This section will be removed from the Progress Notes as of 10/13/2023.'

## 23.Selecting the episode for a progress note without scrolling

Staff are reporting that they are struggling to find the correct episode to document a progress note for a client especially when the client has many open and closed episodes.

You can reduce the number of items that show in your drop down by typing in a search term in the episode field. Simply click on the down arrow of the "Select Episode" drop down arrow and a text search bar will appear above the drop-down menu items.


In the example below, the term "east" was used to only show episodes that are from the "East Bayshore" program. You can see that the number of items in the dropdown went from 87 to just 2.

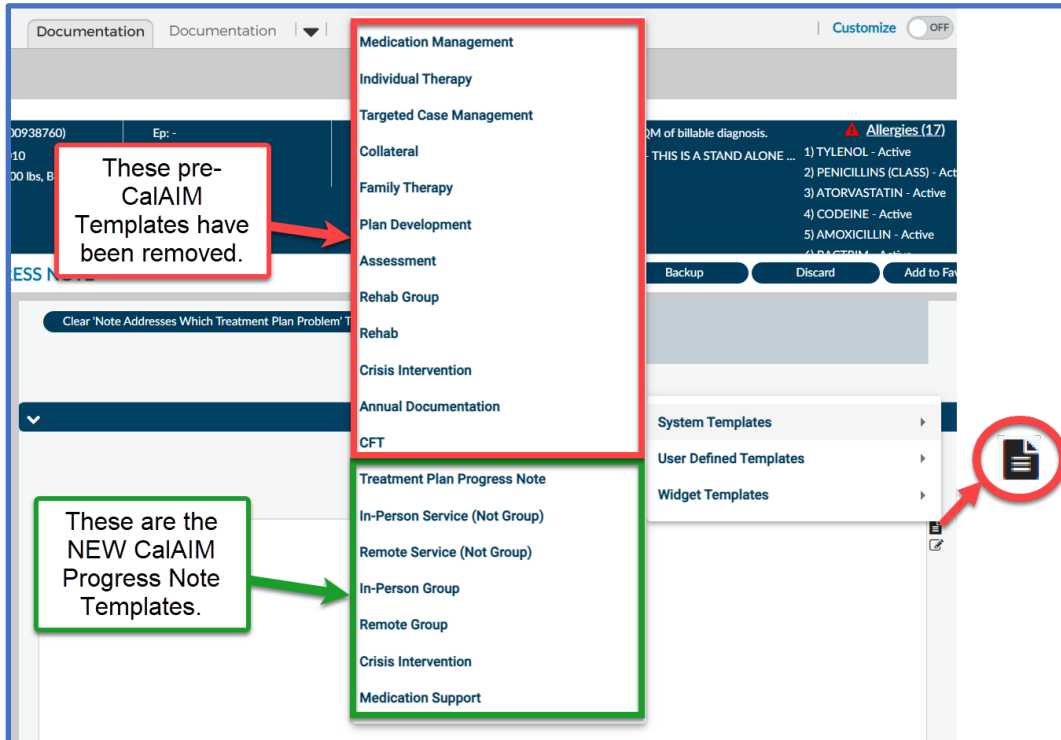
The screenshot shows the 'Select Episode' dropdown menu. A search bar is visible above the list of episodes. A yellow callout box with an arrow pointing to the scrollbar says: 'This client has 87 total episodes in Avatar that you would have to scroll through!'. The list of episodes includes: 'Episode # 1 Admit : 06/02/2012 Discharge : 05/28/2015 Program : Z006600 SIERRA VISTA IMD\_07...', 'Episode # 2 Admit : 11/01/2013 Discharge : 07/21/2015 Program : 416800 EAST BAYSHORE ADULT', and 'Episode # 3 Admit : 12/03/2013 Discharge : 05/12/2014 Program : 410101 NORTH COUNTY ADULT'.

The screenshot shows the 'Select Episode' dropdown menu with the search term 'east' entered in the search bar. Only two episodes are displayed: 'Episode # 2 Admit : 11/01/2013 Discharge : 07/21/2015 Program : 416800 EAST BAYSHORE ADULT' and 'Episode # 22 Admit : 03/28/2017 Discharge : None Program : 416800 EAST BAYSHORE ADULT'. A red arrow points to the search bar.

## 24. Where are the text templates for Progress Notes???



The text templates for progress notes are still there! However, the way to get to them has changed. You can no longer access them by right clicking in the progress notes box. Instead, you should click on this icon  to get to the menu of available templates.



The templates in the **green box** are the templates that have been updated to meet CalAIM requirements. You may use these templates for any services that were provided on or after 7/1/2022 (yes, 2022, but hopefully you don't have any notes from that far back to write!!!).

BHRS has not yet provided guidance on the Treatment Plan Progress Note, so please wait\* until we offer the Treatment Plan Progress Note training before using these templates.

\*Note: Contract Agencies, if you have already been implementing the Treatment Plan Progress Note, please feel free to allow your providers to use the Treatment Plan Progress Note templates.

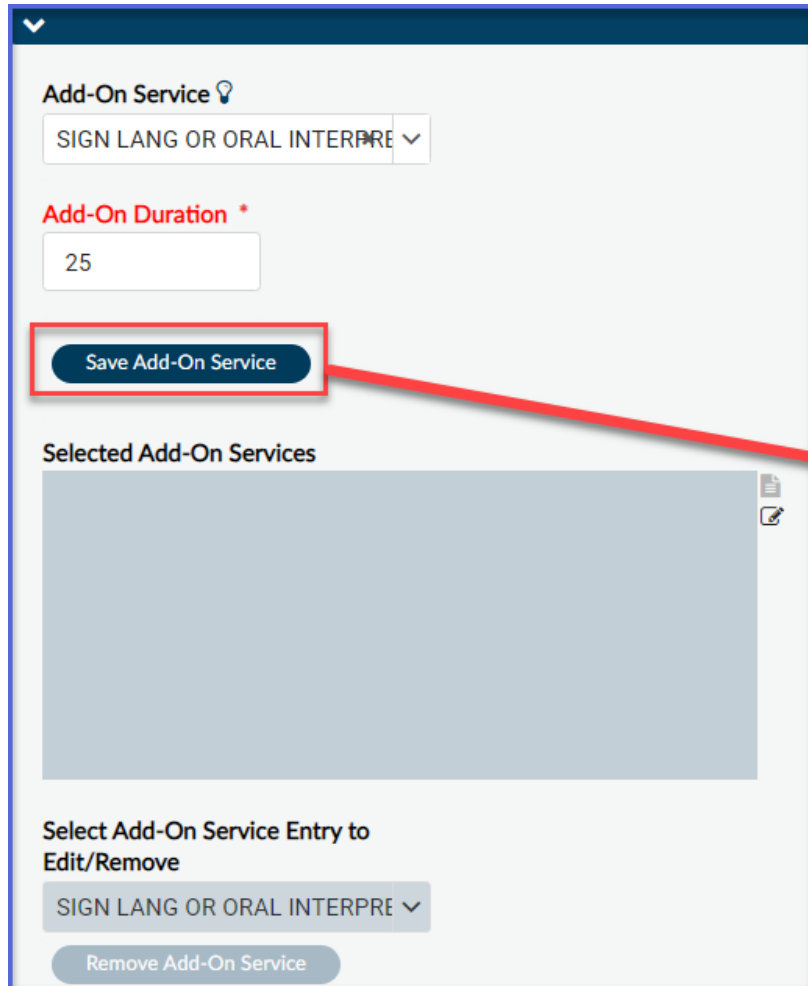
## 25. Where is the button to delete Draft Progress Notes???



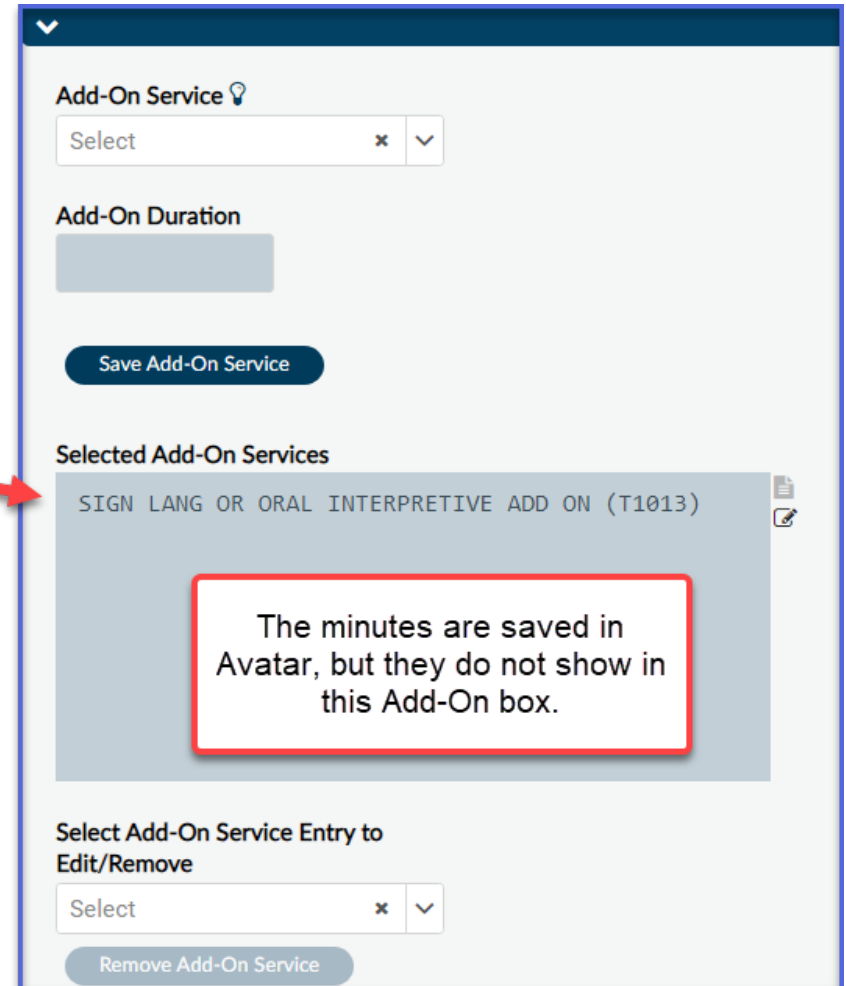
This feature (which was previously named "Delete Draft / Group Default Note") has been added back to the Avatar NX Progress Note (both Mental Health and SUD). Additionally, to reduce confusion, it has been renamed to "**Delete Draft Progress Note.**"

## 26.Add-On Codes Trouble Shooting

Because the Add-On field in Avatar does not show the minutes saved for each add-on, the next few pages describe how to check your Add-On code information and how to correct an error to add-on codes.



This screenshot shows the 'Add-On Service' form in Avatar. The 'Add-On Service' dropdown is set to 'SIGN LANG OR ORAL INTERPRE'. The 'Add-On Duration' field contains the number '25'. A red box highlights the 'Save Add-On Service' button. Below the form is a section for 'Selected Add-On Services' which is currently empty. At the bottom, there is a 'Select Add-On Service Entry to Edit/Remove' dropdown set to 'SIGN LANG OR ORAL INTERPRE' and a 'Remove Add-On Service' button.



This screenshot shows the 'Add-On Service' form after the 'Save Add-On Service' button was clicked. The 'Add-On Service' dropdown is now set to 'Select'. The 'Add-On Duration' field is empty. The 'Selected Add-On Services' section now contains one entry: 'SIGN LANG OR ORAL INTERPRETIVE ADD ON (T1013)'. A red box highlights this entry with the text: 'The minutes are saved in Avatar, but they do not show in this Add-On box.' The 'Remove Add-On Service' button is now disabled.

## Checking Add-On Codes

You can see add-on codes and add-on minutes you added via your “Progress Notes” widget under the “Clinical/Medical” view tab or the Console Widget in your “Documentation” view tab.

The screenshot displays a software interface with two main panels: 'CLINICIAN' and 'CONSOLE WIDGET VIEWER'.

**CLINICIAN Panel:** Contains a table of progress notes. The table has columns for Form Description, Episode, Date, Time, Data Entry By, and Workflow Status. The second row is highlighted in blue.

Form Description	Episode	Date	Time	Data Entry By	Workflow Status
Mental Health Progress Note	84 (921400 DALY CITY YOUTH HEALTH CTR)	07/19/2023	--	TRAIN ID3	Final
Mental Health Progress Note	22 (416800 EAST BAYSHORE ADULT)	07/14/2023	--	ERI TSUJII	Draft
Mental Health Progress Note	84 (921400 DALY CITY YOUTH HEALTH CTR)	07/14/2023	--	PAUL JOHNSON	Draft
Mental Health Progress Note	22 (416800 EAST BAYSHORE ADULT)	07/13/2023	--	PETER ANTONY DELL	Final
Mental Health Progress Note	22 (416800 EAST BAYSHORE ADULT)	07/12/2023	--	PETER ANTONY DELL	Final
Mental Health Progress Note	85 (Z41DT00 AUTISM CENTER OF NC_03-2017)	07/10/2023	--	JOSEPH DELAGUILA	Draft
Mental Health Progress Note	22 (416800 EAST BAYSHORE ADULT)	07/10/2023	--	TRAIN ID15	Final
Mental Health Progress Note	81 (410399 CENTRAL CO. BRIEF TREATMENT)	07/06/2023	--	TRAIN ID15	Final
Mental Health Progress Note	22 (416800 EAST BAYSHORE ADULT)	07/06/2023	--	PETER ANTONY DELL	Final
Mental Health Progress Note	57 (410101 NORTH COUNTY	07/03/2023	--	TRAIN ID9	Draft

**CONSOLE WIDGET VIEWER Panel:** Displays details for a selected 'Mental Health Progress Note'. It includes fields for Note Type, Was this contact in English?, Draft/Final status, Selected Add-On Services (highlighted in red), Duration, Notes, and Type of Progress Note.

**PROGRESS NOTES Panel (Inset):** Shows a detailed view of a note with 'Selected Add-On Services' highlighted in red, including 'GROUP PROLONGED SERVICE (G2212G)' with a duration of 80 minutes.

## Correcting Errors to Add-On Codes

QM, IT, and MIS are still working on updating this form to be more in-line with the CalAIM changes. In the meantime, please follow the instructions below when making corrections for notes with Add-On codes.

**PROGRESS NOTE ERROR CORRECTION REQUEST** [Submit] [Discard] [Add to Favorites]

Original Note Information (Enter Date of Service to Search MM/DD/YYYY) \*

Jul 13 2023 -17CA-MEDICATION SUPPORT - LOC-OFFICE -67 mins by [ ] NOTE ID NOT66668.004, Jul [ ]

Select Items to Change \*

- Location
- # of Clients in Group
- Other Billable Service Time
- Wrong Client
- Wrong Episode
- Duplicate Entry
- Service Code
- Service Time Client Present in Person
- Date of Service
- Other Client's PHI Disclosure
- Wrong Co-Practitioner
- Other

NEW Date of Service [ ] [T] [Y] [ ]

NEW Other Billable Service Time (Min) [ ]

CORRECT Episode [Select] [v]

Number of Client's In Group [ ]

NEW Location Code [Select] [v]

NEW Service Time Client Present in Person (Min) [ ]

CORRECT Client [ ]

Change Comments/Reason \*

**Select This When Requesting Change to Add-On Code**

**Select This When Requesting Change to Documentation Time or Travel Time (for services on or after 7/1/2023)**

**For Progress Notes created on or after 7/1/2023, be sure to include details in the comments about the change you need to ensure that the changes that are made are accurate!**

**For services that need an add-on code added/removed/modified, OR if you need to change the primary service code but don't need to change the add-on code -- specify what the primary service code should be including the time for that service, and specify what the add-on code should be, including the time.**

**For services that need adjustments made to the documentation time or travel time -- include what each time should actually reflect, even if you're only editing one or the other.**

## 27.How do I view old Progress Notes?

There are several different ways to view old progress notes. The table below shows 3 main ways to view progress notes easily through various widgets. Alternatively, you also always have the ability to view progress notes in a clean, formatted, and PDF-able way by running the **“Progress Notes Report.”**

	Console Widget Viewer	Progress Notes Widget	Last 100 Progress Notes Widget
View Tab	Documentation Tab	Clinical/Medical/SUD Tabs	Clinical/Medical Tabs
System	SUD and MH	SUD and MH	MH only (coming soon for SUD)
Description	Viewing individual progress notes. Filterable using the Forms Widget.	Less-filterable but easy way to view previous notes is through the original Progress Notes widget. You can see a larger number of notes, but you won't be able to filter it like you can with the Last 200 Progress Notes widget.	Allows you to preview and filter the last 100 notes for a client. This widget allows you to filter/search by date of service, practitioner, service code, and notes field (you can even search for a specific word via the notes filter!). (Not currently available for SUD staff).

The next 2 pages show what each widget looks like.

## CONSOLE WIDGET VIEWER



**Step 1)** Select a client.

**Step 2)** Under the “Documentation” Tab on the very top left, you’ll see a list of documents you can view. Click on it.

**Step 3)** You’ll see it pop on the widget screen with a list of the following:

- Form Description
- Episode
- Date
- Time
- Data Entry By
- Workflow Status

**Step 4)** You can click on the Progress Note or Form you’d like to look at. It’ll pop up in the widget next to it called “Console Widget Viewer”.

Documentation Admin MH TEST, JOLLY T (000938760) All Episodes Customize OFF

Plan  
Day Treatment  
Daily Note  
Day Treatment  
Weekly Summary  
Diagnosis  
Discharge  
(Outpatient)  
Initial Contact  
Screening (ICI)  
Medication  
Administration  
Record  
**Mental Health Progress Note**  
Update Client Data  
URGENT CARE PLAN  
YOUTH Initial

TEST, JOLLY T (000938760)  
Age: 12, DOB: 10/27/2010, BMI: 87.9, Ht: 3' 4.0", Wt: 200 lbs  
Gender: M

ADMIN MENTAL HEALTH

Forms Scanned Documents

Form Descriptio	Episo	Date	Time	Data Entry By	Work Stat
M...				A...	
Mental Health Progress Note	81 (4103 CENTI CO. BRIEF TREAT	07/06	--	TRAIN ID15	Fina

CONSOLE WIDGET VIEWER

Client Treatment and Recovery Plan ✕

Update Client Data ✕

**Update Client Data**  
Client Name: TEST, JOLLY T  
Client Last Name: TEST

Widget to view Docs

Where you can view it



 Progress Notes

**PROGRESS NOTES**

Previous days:

Selection:

(1) BHRS Standard Note - 07/19/2023 by TRAIN03,TRAI  
**Mental Health Progress Note**  
 Progress Note For: New Service

Practitioner: TRAIN ID3

Date Of Service: 07/19/2023

Service Charge Code: UNCLAIMABLE SERVIC

Service Program: 417000 COASTSIDE ADULT

You can change this number to a larger number if you want to review notes from a longer period of time.  
 (e.g., delete 30 and input 200 instead and it will show more notes!)

 MH Last 100 Progress Notes

**MH LAST 100 PROGRESS NOTES**

Search:

Use these search bars to search specific terms/dates/etc.

Date of Service	Practitioner	Service Code	Note	Ep.
08/01/2023	ID4,TRAIN	51CA	This note was finalized on 8/1/23 at 8:32 a.m.	22
07/31/2023	ID4,TRAIN	7CA	I am submitting this note on 7/31/2023 at 4:50 PM	22
07/31/2023	ID4,TRAIN	51CA	this note was submitted at 5:10 pm on 7/31.	22
07/27/2023	TSUJII,ERI	7CA	dsadsadsadsa	22
07/26/2023	DELAGUILA,JOSEPH	55	test	85
07/19/2023	ID3,TRAIN	55	TEST	84

## Deleting Forms in Avatar

### 28. Oh no! I made a mistake and need to delete a form in Avatar.

In general, most forms in Avatar cannot be deleted, especially if they have been finalized. Below is a general guide of what to do if you want to correct an error in a finalized document in Avatar.

	Progress Note	Assessment	Treatment Plan	Avatar Consent
<b>Grammatical / Minor Errors in Form</b>	Leave as is.	Leave as is.	Leave as is.	Leave as is.
<b>Forgot to include information.</b>	Use “Append Progress Notes” form to add information.	Use “Assessment Addendum” form to add information.	Use “Client Treatment Plan Addendum” form to add information.	Contact QM.
<b>Included information that should not have been included.</b>	Contact QM.	Contact QM.	Contact QM.	Contact QM.
<b>Put in the wrong date.</b>	Use “Progress Note Error Correction Request” form.	Contact QM.	Contact QM.	Contact QM.
<b>Made error in data entered in progress note (not narrative, but one of the time/service code/etc. fields).</b>	Use “Progress Note Error Correction Request” form.	N/A	N/A	N/A
<b>Submitted a form for something that did not happen (e.g., marked wrong consent form).</b>	Contact QM.	Contact QM.	Contact QM.	Contact QM.
<b>Accidentally created extra draft of a form.</b>	Use “Delete Draft Progress Note” button on the note that needs to be deleted.	Leave as is. Note error in progress note.	Leave as is. Note error in progress note.	Leave as is. Note error in progress note.
<b>Wrong client.</b>	Contact QM.	Contact QM.	Contact QM.	Contact QM.
<b>Wrong episode.</b>	Contact QM.	Leave as is. Note error in progress note.	Contact QM.	N/A

\* “Contact QM” does not guarantee that form will be deleted. It means that QM will review your request and determine if the form can or cannot be deleted based on the information provided.

Updated: 2/13/2024

[Return to Table of Contents](#)

## Section 3

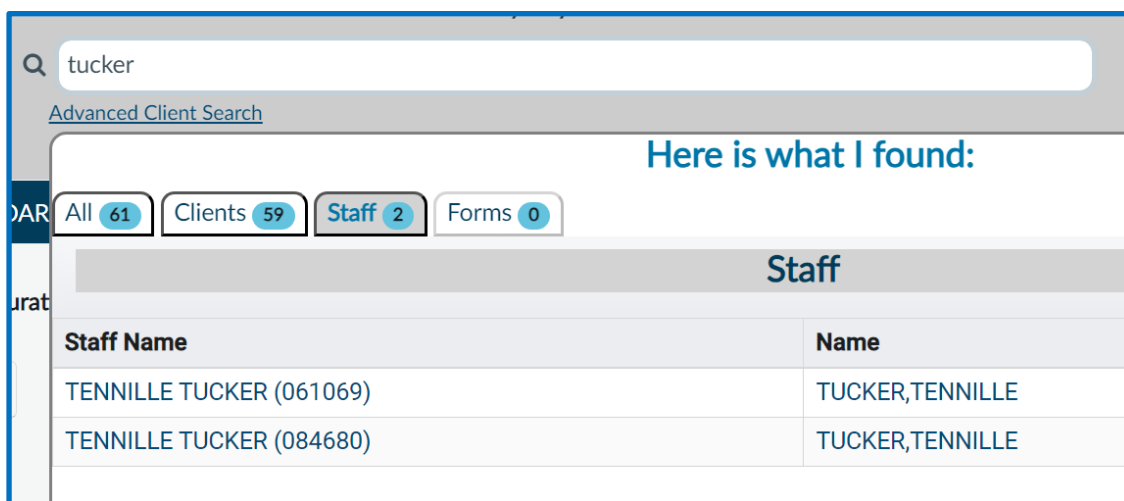
# Supervisor - Supervisee Communication

- [Finding and Selecting the Correct Avatar User ID for Staff](#)
- [Sending To Dos and Notifications](#)
- [Co-Signatures](#)

## Finding and Selecting the Correct Avatar User ID for Staff

### 29. Multiple User IDs show up for my supervisor (or supervisee) when trying to communication via Avatar (Co-signature, etc.)

There are some staff who have multiple User IDs in Avatar, which results in their name coming up more than once when staff search for them. This can be for a variety of reasons (staff person works in both SUD and MD, staff was formerly a contracted provider and is now a BHRS employee, etc.)



The screenshot shows the Avatar search interface. At the top, there is a search bar with the text 'tucker' and a magnifying glass icon. Below the search bar is a link for 'Advanced Client Search'. The main content area is titled 'Here is what I found:'. Below this title are four filter buttons: 'All 61', 'Clients 59', 'Staff 2', and 'Forms 0'. The 'Staff' filter is selected. Below the filters is a table with the heading 'Staff'. The table has two columns: 'Staff Name' and 'Name'. There are two rows of results:

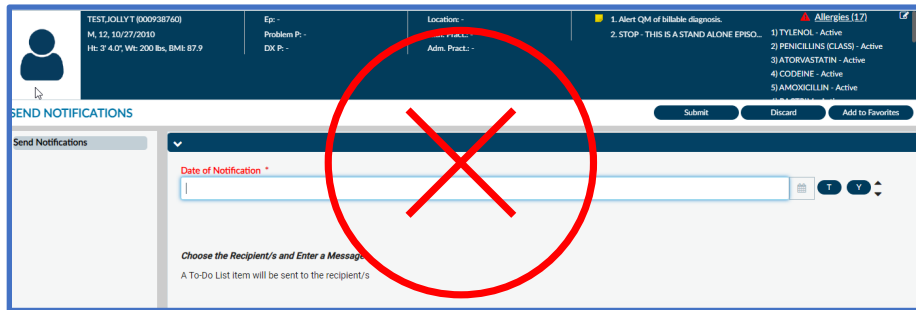
Staff Name	Name
TENNILLE TUCKER (061069)	TUCKER,TENNILLE
TENNILLE TUCKER (084680)	TUCKER,TENNILLE

When this happens, staff should first ask the staff person to whom they are trying to send the notification/co-signature which option to select. If they do not know, please contact Muriel Espera ([MEspera@smcgov.org](mailto:MEspera@smcgov.org)) in the BHRS Billing Department (a.k.a. MIS) to ask about which ID should be used.

## Sending To Dos and Notifications

### 30. “Send Notification” Form is RETIRED

The “**Send Notification Form**” that was available in the old Avatar does not function in NX. If you try to use this “Send Notifications” form in Avatar NX, nothing will happen – it does not work.



### 31. How do I send forms to review to my supervisor or other Avatar users now that the Send Notifications form has been retired?

There are several different ways to send Notification or To Do’s to other Avatar users. The table below shows 3 ways to send To Dos or Notifications.

	“Send To Do” Quick Action	“Send To Do” button on Forms	Document Routing
View Tab	MyDay Tab in the Quick Actions widget	Available on select forms (not available on all forms)	Available on select forms (not available on all forms)
Description	This is limited to sending a To Do notification to one Avatar user. Cannot send to multiple Avatar users.	If this button is embedded in the form, you are able to send To Dos to multiple users.	For use when co-signature is required. Links directly to the form. See “ <a href="#">Co-Signature</a> ” section for more information on Document Routing.
	Does not link directly to a form.	Links directly to the form.	Links directly to the form.

## “Send To Do” through Quick Actions

In NX, users will have to use the **Quick Actions** (on your “myDay” view tab) to send a **To Do** item. This can only be sent 1 at a time to another user, and you **must select a client** before having access to these Quick Actions items. Then, fill out the pop up note, and click “Save.” Your To Do item is now sent.

myAvatar NX myDay Documentation Call Center TESTONE,TEST V MR

LOGGED IN AS  
TRAIN05,TRAIN

Recent Clients  
My Forms  
My Favorites  
Recent Forms

Control Panel  
Recent Clients Site

TESTONE,TEST V MR (000930000)

MY CALENDAR  
Time-Slot Duration: 30 minutes  
July 2023

What can I help you find?  
Advanced Client Search

SEND A TO DO  
TESTONE,TEST V MR (000930000)

Send Notification To\*  
TRAIN04,TRAIN (TRAIN04)

Send Notification Outgoing Comments\*  
Please look at progress note dated 2/5/2023

Cancel Save

First, select the Client that should be associated with the To Do item.

Send a To Do

Alerts  
Alerts last updated:  
05/11/2015 04:36 PM

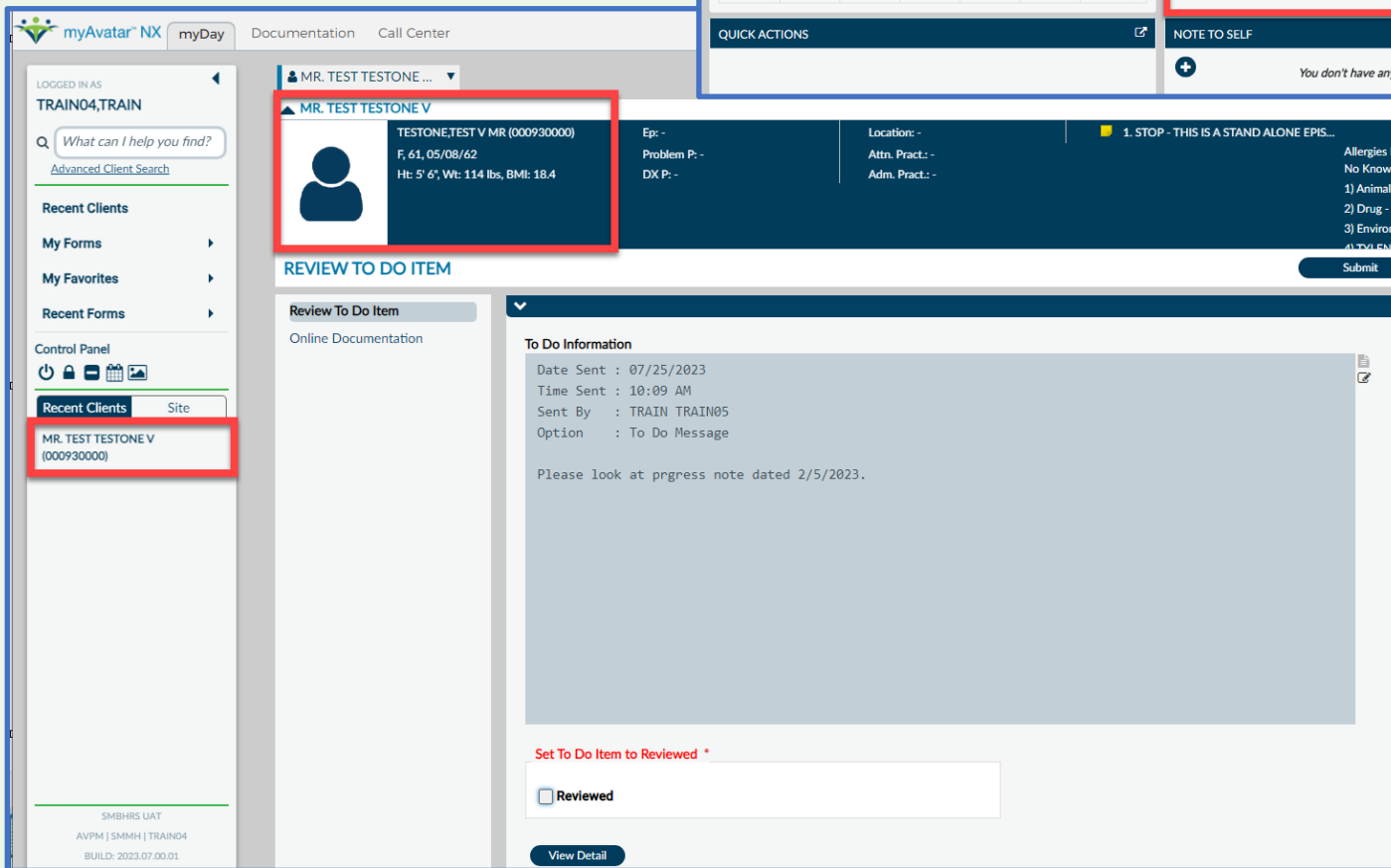
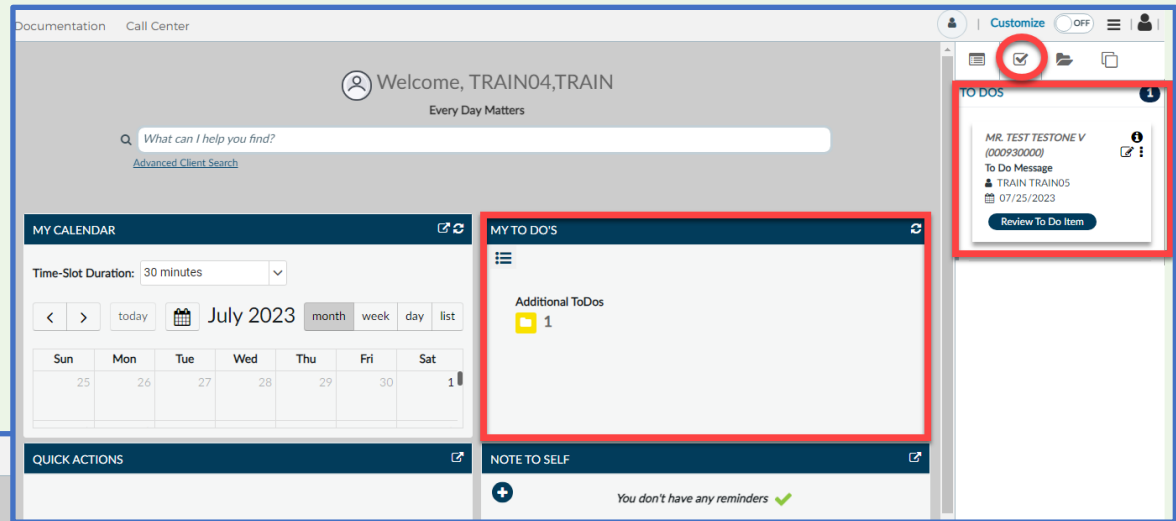
### REMINDER

You cannot send a To Do without first selecting a client.

The receiving Avatar user should be able to view the To Do item in their To Do list (see next page for how the To Do looks to the receiving user).

When the Avatar user receiving the To Do item clicks on the To Do item, a screen will pop up with the content of the note that was sent, and the client will also pop up on the left hand side of their screen.

However, because this type of To Do note is not directly linked to the form, the user will need to search the form to open it.



Therefore... **Staff should specify what form needs to be reviewed in the content of the note.**

Sample Information to Include in To Do Note:

- Form Name
- Date of Form

## Send To Do” button embedded in Forms

For some forms (such as the Transfer/Discharge, AOD 60 day Discharge), users can create a To Do directly from the form and send to multiple users (see screen shot below).

Unfortunately, this is not able to be added to all forms, so if you do not see the “Send To Do” button (see screen shot below) when you open the form, you will need to send a separate “To Do” through the **Quick Actions** process described above.

The image shows a software interface for a 'TRANSFER/DISCHARGE REQUEST' form. At the top, a toolbar contains buttons for 'Submit', 'Backup', 'Discard', 'Send To Do', and 'Add to Favorites'. The 'Send To Do' button is highlighted with a red box, and a red arrow points to a larger, zoomed-in view of the button. Below the toolbar, a 'Create To Do' modal window is open. It features two search fields: 'Select Staff' and 'Select Team', each with a search icon and an 'Add' button. Below these are a 'Send To:' field and a large 'Note:' text area. At the bottom of the modal are buttons for 'Remove', 'Remove All', 'Clear Note', 'Save', and 'Cancel'. A yellow callout box on the left contains the text: 'You can only save if you type content in the “Notes” section.' A red arrow points from this callout box to the 'Note:' text area in the modal.



# Co-Signatures

## \*UPDATED\* 31. Supervisor Co-Signature Instructions (Document Routing)



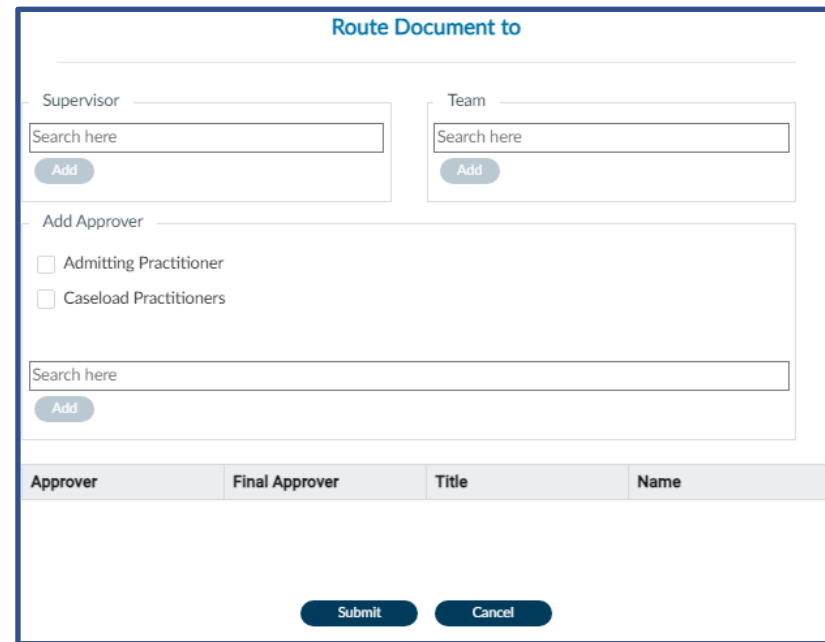
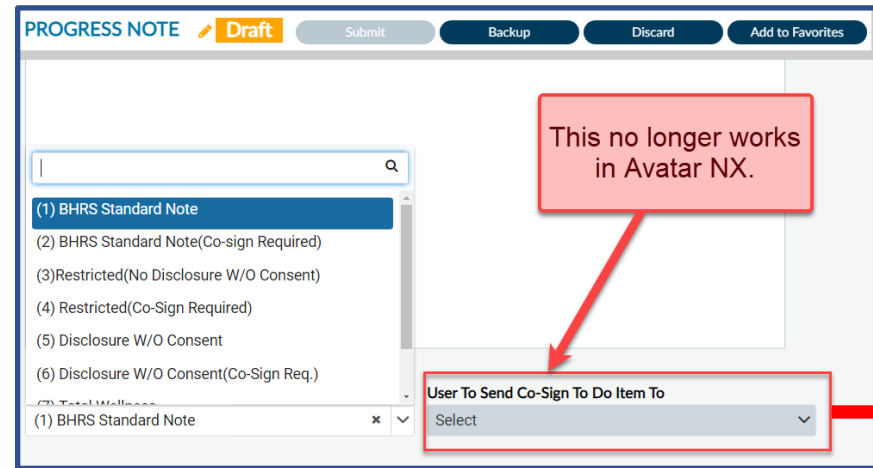
The previous mechanism by which co-signatures were obtained in the old Avatar does not function in Avatar NX. To avoid notes being stuck in limbo and to ensure that staff are able to get the required co-

signatures, the Avatar NX mechanism for co-signature was turned on.

However, the NX mechanism comes with two new functionalities that cannot currently be turned off:

- 1) The Document Routing pop up will show every time a progress note is finalized regardless of if a co-signature is required, and
- 2) It requires the co-signers to input their Avatar password in order to approve documents. Instructions on how to address the document routing pop up if no co-signature is needed are included in the next few pages.

The IT department is continuing to work with the vendor to explore a solution to this that will avoid staff needing to take these extra steps. If a solution is able to be found, we will notify staff as soon as it's available.



## How do I send forms for co-signature in NX?

### Route Document to

**“Document Routing”**: This is a feature in NX that staff can use to route documents to their supervisor. Please note that this window **will pop up for all progress notes that get finalized, regardless of if the note requires a co-signature.** IT is unable to limit this pop up to show only for notes that require co-signature.

	<a href="#">For Staff Who Do NOT require co-signature</a>	<a href="#">For Staff Who Require Co-Signature (Option 1)</a>	<a href="#">For Staff Who Require Co-Signature (Option 2)</a>
For which Staff does this option apply?	All staff, regardless of whether or not co-signature is actually required. (Licensed staff will see this, too).	Some accounts in Avatar are set to require a co-signature. These staff will see the <b>“Supervisor”</b> text as required (red font).	<ol style="list-style-type: none"> <li>1) Those staff who do <u>not</u> have “Supervisor” or “Add Approver” required but their supervisor still requires their co-signature should use this option.</li> <li>2) Some staff will see the <b>“Add Approver”</b> text as required (red font). Use this option if the Add Approver is required.</li> </ol>
Description	Will generate when finalizing all progress notes regardless of if staff requires co-signature, but can be bypassed without sending to supervisor if staff does not require co-signature.	Available on Assessments, Treatment Plan, and Progress Notes.	Available on Assessments, Treatment Plan, and Progress Notes.
Additional Notes		The individual added as a co-signer using the ‘Supervisor’ field will be listed as “Supervisor” on the printout of the final, co-signed version of the document.	The individual added as a co-signer will be listed as “Staff” on the printout of the final, co-signed version of the document.

## For Staff Who Do **NOT** Require Co-Signature:

The Routing pop up box will still show up when you file the note, but the “approver” fields are not required\*. Staff will just need to hit submit without filling anything out.

\*Required fields will be in red font.

*Info specific to progress notes: For staff who do not require a co-signature, be sure to select a note type that does not require a co-signature.*

### **Info specific to progress notes:**

*For staff who do not require a co-signature, be sure to select a note type that does not require a co-signature.*

(1) BHR Standard Note  
(2) BHR Standard Note(Co-sign Required)  
(3) Restricted(No Disclosure W/O Consent)  
(4) Restricted(Co-Sign Required)  
(5) Disclosure W/O Consent  
(6) Disclosure W/O Consent(Co-Sign Req.)  
(7) Total Wellness  
Select

Route Document to

Supervisor Search here Add

Team Search here Add

Add Approver

Admitting Practitioner  
 Caseload Practitioners

Search here Add

Approver	Final Approver	Title	Name
----------	----------------	-------	------

Submit Cancel

IT has checked with the Avatar vendor to see if this pop up can be removed. However, we were informed that this is not something that can currently be removed.

For the time being, please continue to hit submit without adding a supervisor name while IT continues to work with our vendor to resolve this issue.

## For Staff Who DO require co-signature (Option 1):

Follow the instructions on this page if...

1) The “**Supervisor**” text above the top left box is in red font.

When a staff person does require co-signer then the approver field will be marked as required (shown in red font).

Alternatively, on some forms there is a “Pending Approval” option that is active for some users. By selecting “Pending Approval” you will trigger the Document Routing window to pop up, and you will enter your supervisor name and click “add” to send to your supervisor.

Route Document to

Supervisor: Required (red text) | Team: LEAVE BLANK

Add (green callout: Click the "Add" Button and Supervisor will show in the table at the bottom.)

Add Approver

Admitting Practitioner  
 Caseload Practitioner

LEAVE BLANK

Add

Search by Last Name. (red callout)

Approver	Final Approver	Full Name	Phone
Supervisor's information will show here. (green callout)			

Submit (red box) | Cancel

### Info specific to progress notes:

For staff who require a co-signature, be sure to select a note type that does require a co-signature.

(1) BHRS Standard Note

(2) BHRS Standard Note(Co-sign Required) (red box)

(3) Restricted(No Disclosure W/O Consent)

(4) Restricted(Co-Sign Required) (red box)

(5) Disclosure W/O Consent

(6) Disclosure W/O Consent(Co-Sign Req.) (red box)

(7) Total Wellness

Select

Date Created: 08/22/2023 at 01:13 PM PD

Verify Password

Password

Enter Password

Verify | Cancel

SAN MATEO COUNTY BEHAVIORAL HEALTH & D...

**Note for Approvers:** Another change from the old Avatar is that with Avatar NX the approver needs to enter their Avatar password to complete the approval process. Currently, this is not a feature that QM or IT are able to disable, but IT is working with the Avatar vendor to find a solution. For more information on how supervisors can approve/reject notes from staff needing co-signature, move on the [next question](#) in this document.

For Staff Who DO require co-signature (Option 2):

**Follow the instructions on this page if...**

- 1) If nothing is marked as required, but supervisor is requiring co-signature (e.g., if supervisor wants to review new staff's notes for a period of time), OR
- 2) The **"Add Approver"** text in the center of the window is in red font.

Alternatively, on some forms there is a "Pending Approval" option that is active for some users. By selecting "Pending Approval" you will trigger the Document Routing window to pop up, and you will enter your supervisor name in the "Add Approver" field and click "add" to send to your supervisor.

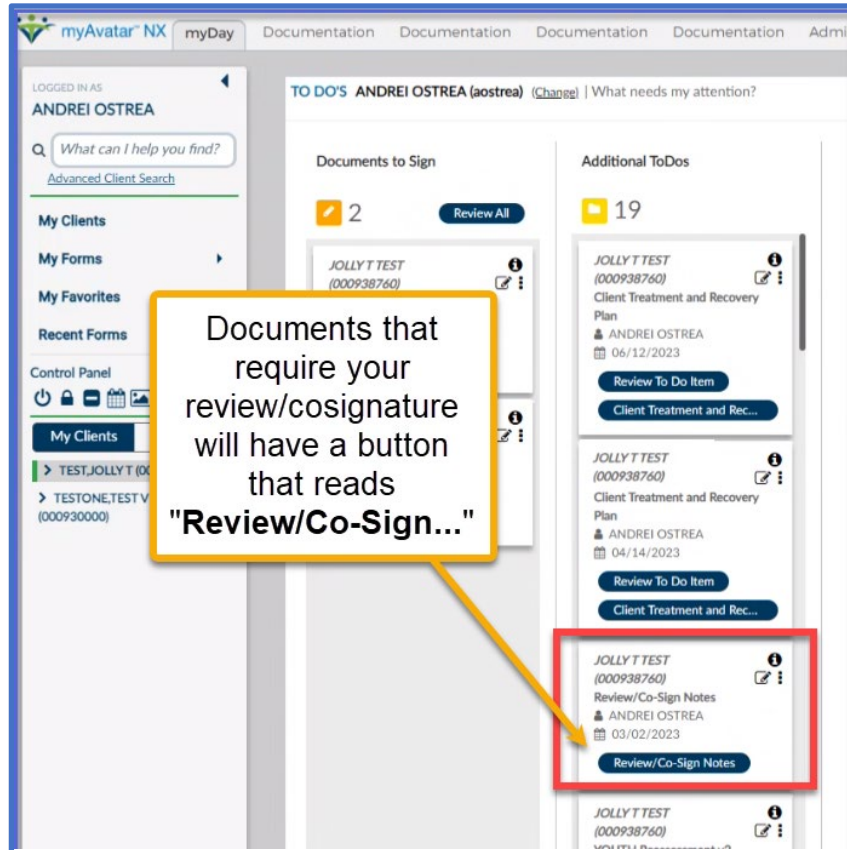
**Info specific to progress notes:**

For staff who require a co-signature, be sure to select a note type that does require a co-signature.

**Note for Approvers:** Another change from the old Avatar is that with Avatar NX the approver needs to enter their Avatar password to complete the approval process. **Currently, this is not a feature that QM or IT are able to disable, but IT is working with the Avatar vendor to find a solution.** For more information on how supervisors can approve/reject notes from staff needing co-signature, move on the [next question](#) in this document.

## 32. Where do supervisors go to review documents for co-signature?

Documents for co-signature should show up in the supervisors' To Do List, which can be found on the **My To Dos** widget in the MyDay view window or on the To Do section of the **Activity Panel** on the right side of the screen. See [Activity Panel](#) section for more information on how to access the Activity Panel. Once you open the To Do List, you should be able to see all your pending To Do items, including ones that require co-signature.



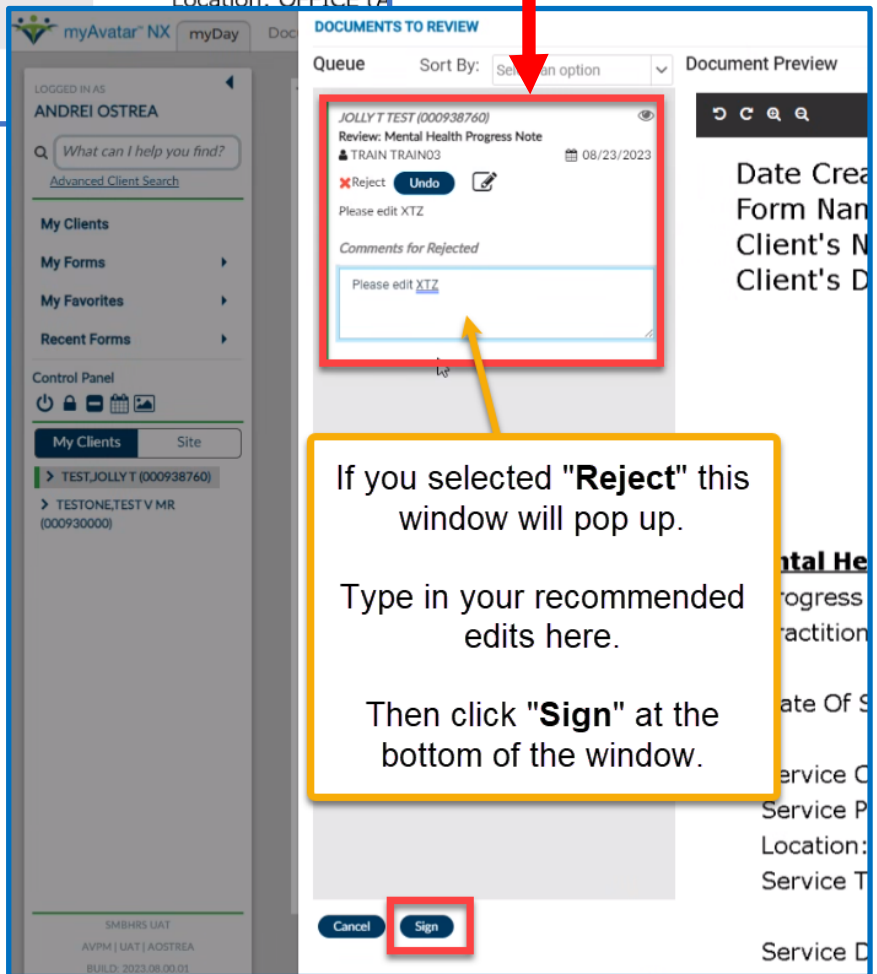
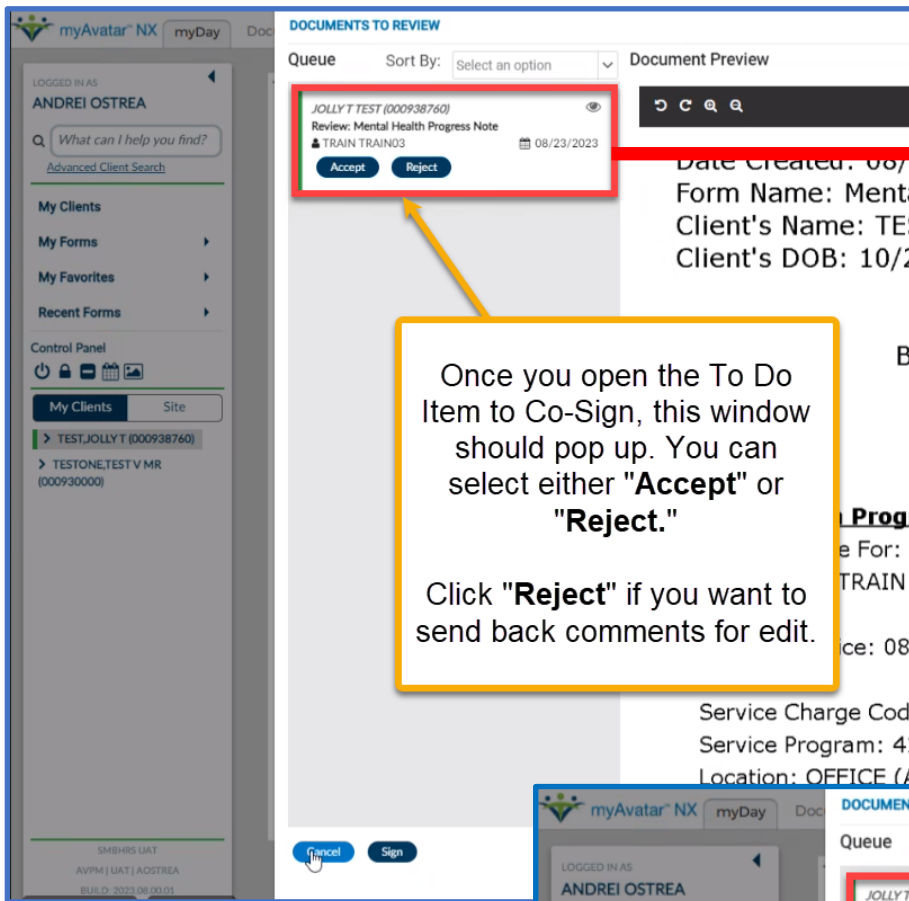
### Troubleshooting

If the supervisor does not see the To Do Item, this could be for several reasons:

- 1) The supervisor has multiple user accounts associated with their name and the inactive/incorrect account was selected. Double check with the supervisor which account should be selected when sending To Dos.
- 2) If there is only one account that pops up and it's still not being received, it may be that the account may have been deactivated.

Accounts may be deactivated for a variety of reasons including, but not limited to: too many failed attempts to log in, not having used Avatar for an extended period of time (e.g., staff was on leave), etc.

If both you and your supervisor have been regularly logging into Avatar successfully, then contact BHRS IT directly to resolve the issue.



**Note for Approvers:** Another change from the old Avatar is that with Avatar NX the approver needs to enter their Avatar password to complete the approval process. Currently, this is not a feature that QM or IT are able to disable, but IT is working with the Avatar vendor to find a solution.

Verify Password

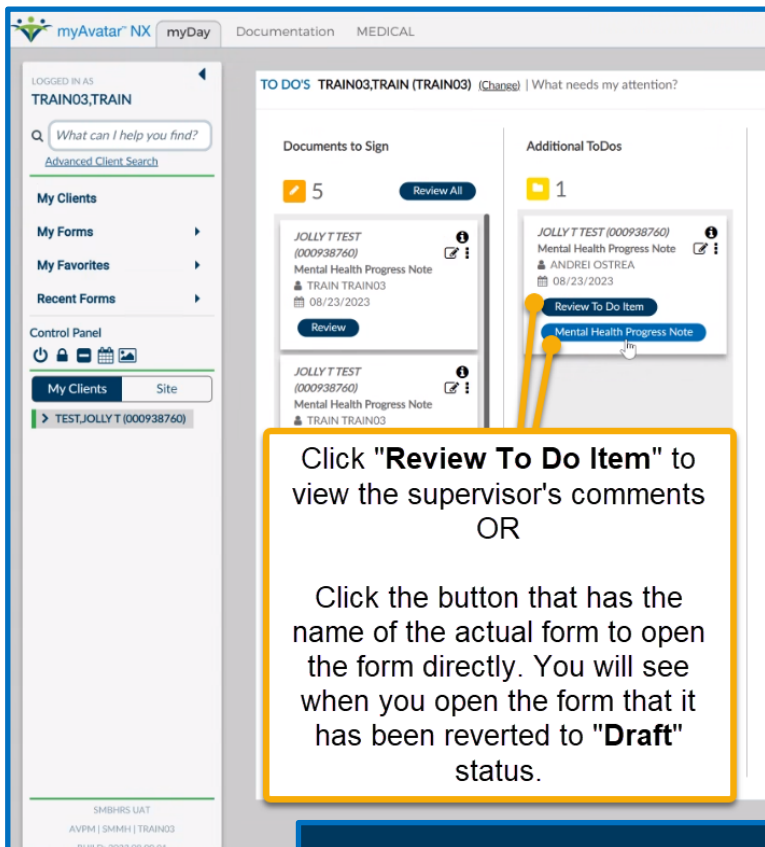
Password

Enter Password

Verify Cancel

### 33. Finding Edited Comments from Supervisors

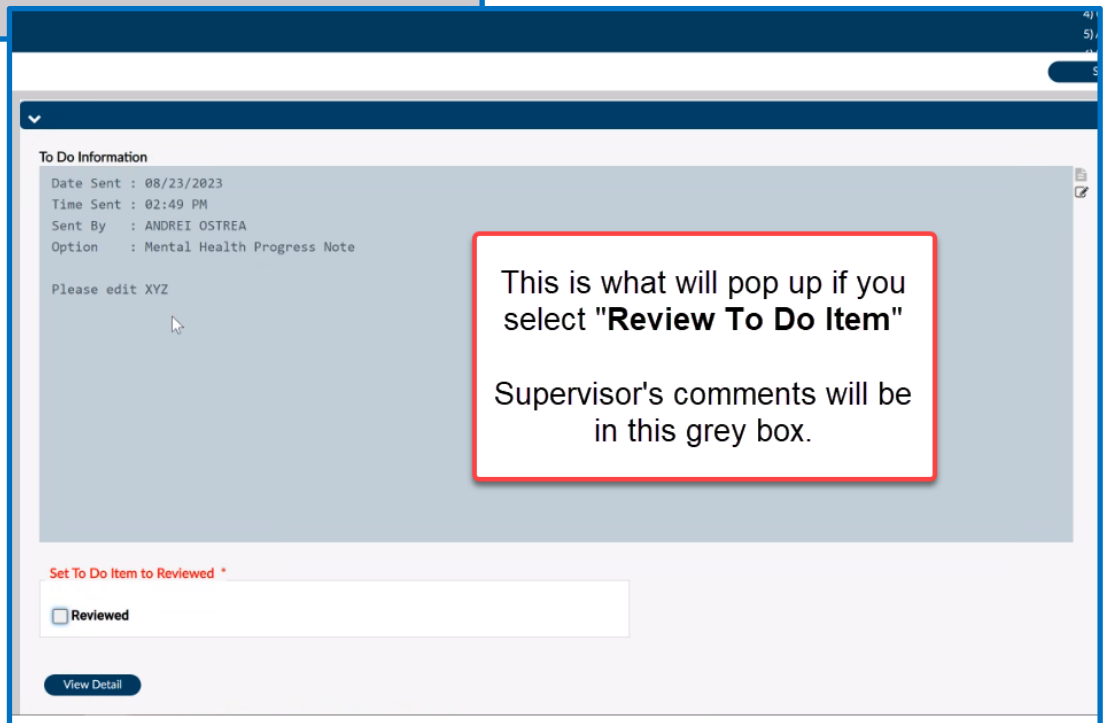
When a supervisor sends a form back to you for edits, you can find the form in your "To Do" section of your Activity Pane. See the ["Menus and Task Bar" section](#) of this document for more information on how to use the Activity Pane. If the form is locked and you are not able to edit, please contact BHRS IT to resolve this issue.



The screenshot shows the myAvatar NX interface. On the left is a navigation pane with sections like 'My Clients', 'My Forms', 'My Favorites', and 'Recent Forms'. The main area is titled 'TO DO'S TRAIN03,TRAIN (TRAIN03) (Change) | What needs my attention?'. It contains two columns: 'Documents to Sign' with 5 items and 'Additional ToDos' with 1 item. The 'Additional ToDos' item is highlighted with a yellow box and a callout box. The callout box contains the following text:

Click "**Review To Do Item**" to view the supervisor's comments  
OR

Click the button that has the name of the actual form to open the form directly. You will see when you open the form that it has been reverted to "**Draft**" status.



The screenshot shows a 'To Do Information' pop-up window. It contains the following text:

**To Do Information**  
Date Sent : 08/23/2023  
Time Sent : 02:49 PM  
Sent By : ANDREI OSTREA  
Option : Mental Health Progress Note

Please edit XYZ

Below the text is a checkbox labeled 'Reviewed' and a 'View Detail' button.

A red-bordered callout box on the right contains the following text:

This is what will pop up if you select "**Review To Do Item**"  
Supervisor's comments will be in this grey box.



## Section 5

# Printing and Scanning

- [Printing Reports / Formatted Versions of Forms](#)
- [Scanned Documents in NX](#)

# Printing Reports / Formatted Versions of Forms

## 34. How do I print formatted versions of forms?

There are several different ways to print formatted / formal versions of client documents/forms in Avatar NX.

	Printing Individual Forms	Printing Multiple Forms	Saving PDF Versions of Forms
View Tab	Documentation Tab	Documentation Tab or Search function	Pop up of Report.
Description	<p>This is limited to sending a To Do notification to one Avatar user. Cannot send to multiple Avatar users.</p> <p>Does not link directly to a form.</p>	<p>If this button is embedded in the form, you are able to send To Dos to multiple users.</p> <p>Links directly to the form.</p>	<p>For use when co-signature is required.</p> <p>Links directly to the form.</p> <p>See “<a href="#">Co-Signature</a>” section for more information on Document Routing.</p>

SAN MATEO COUNTY HEALTH  
**BEHAVIORAL HEALTH & RECOVERY SERVICES**

San Mateo County Behavioral Health and Recovery Services  
Adult Assessments v2 Abstract Report

TESTONE, TEST V MR (930000) DOB: 5/8/1962  
1235 APPLE ST APT 12a  
SAN MATEO, CA 94403

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ADULT Initial Assessment v2

**Assessment Information**

Assessment Type: Initial Assessment (Clinician, Casemgr)  
 Assessment Date: 11/8/2022  
 Completed On: 11/8/2022  
 Completed By: PAUL JOHNSON (020900) Client's Age: 60  
 Source of Information: Mills-Peninsula

**Language Information**

Primary Language of Client: Armenian  
 Client's Preferred Language: Armenian  
 Language Assessment was Conducted In?: Cambodian

**CSI Information**

Education: 10 Years  
 Employment: Employed in competitive job market (Part Conservatorship/Court Status: Juvenile Court, Ward - Juvenile Offender  
 Living Arrangements: Group Home (includes Levels 1-12 for chi  
 Number of children under the age of 18 the client cares for at least 50% of the time: 0  
 Number of dependent adults age 18 or older the client cares for, or is responsible for: 0  
 Service Strategies: Dlv'r'd in Partnership w/ Law Enforcement  
 Integrated Dual Dx Treatment

**Clinical Information**

Description of Current Presenting Problems: (incl. referral reason, symptoms, behaviors, and impairments)  
 INITIAL ASSESSMENT 4/18/2016  
 Mental Health History: (incl. onset, severity, and other changes)  
 INITIAL ASSESSMENT 4/18/2016  
 Client's Strengths / Assets / Positive Coping Skills:  
 INITIAL ASSESSMENT 4/18/2016

**SOGI**

What is your preferred name? testone  
 What is your sexual orientation? Bisexual  
 What is your current gender identity? Male

Electronically Signed By:

Print Date: 8/18/2023
CONFIDENTIAL PATIENT INFORMATION  
See California Welfare and Institutions Code Section 5328
Page 1 of 19

SAN MATEO COUNTY HEALTH  
**BEHAVIORAL HEALTH & RECOVERY SERVICES**

San Mateo County Behavioral Health and Recovery Services  
Adult Assessments v2 Abstract Report

TESTONE, TEST V MR (930000) DOB: 5/8/1962  
1235 APPLE ST APT 12a  
SAN MATEO, CA 94403

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ADULT Reassessment v2

**Assessment Information**

Assessment Type: Initial Assessment (Clinician, Casemgr)  
 Assessment Date: 4/28/2022  
 Completed On: 4/28/2022  
 Completed By: PAUL JOHNSON (020900) Client's Age: 59  
 Source of Information: Mills-Peninsula

**Language Information**

Primary Language of Client: Armenian  
 Client's Preferred Language: Armenian  
 Language Assessment was Conducted In?: Arabic

**CSI Information**

Education: 10 Years  
 Employment: Employed in competitive job market (Part Conservatorship/Court Status: Juvenile Court, Ward - Juvenile Offender  
 Living Arrangements: Board And Care  
 Number of children under the age of 18 the client cares for at least 50% of the time: 0  
 Number of dependent adults age 18 or older the client cares for, or is responsible for: 0  
 Service Strategies: Dlv'r'd in Partnership w/ Law Enforcement  
 Integrated Dual Dx Treatment

**Clinical Information**

Description of Current Presenting Problems: (incl. referral reason, symptoms, behaviors, and impairments)  
 INITIAL ASSESSMENT 4/18/2016  
 Mental Health History: (incl. onset, severity, and other changes)  
 INITIAL ASSESSMENT 4/18/2016  
 Client's Strengths / Assets / Positive Coping Skills:  
 INITIAL ASSESSMENT 4/18/2016

**SOGI**

What is your preferred name? testone  
 What is your sexual orientation? Bisexual  
 What is your current gender identity? Male

Electronically Signed By: PAUL JOHNSON ADMIN (ADMIN SPPT), on 4/28/2022

Print Date: 8/18/2023
CONFIDENTIAL PATIENT INFORMATION  
See California Welfare and Institutions Code Section 5328
Page 15 of 19

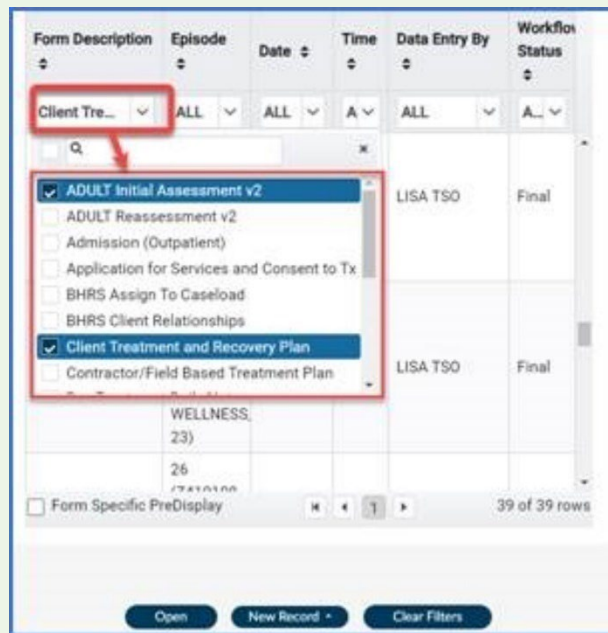
## Printing Individual Forms

Here is the easiest way that we've found to select and print single reports for most forms\*. The screen shot below shows "Admin" but it works with other users, too.

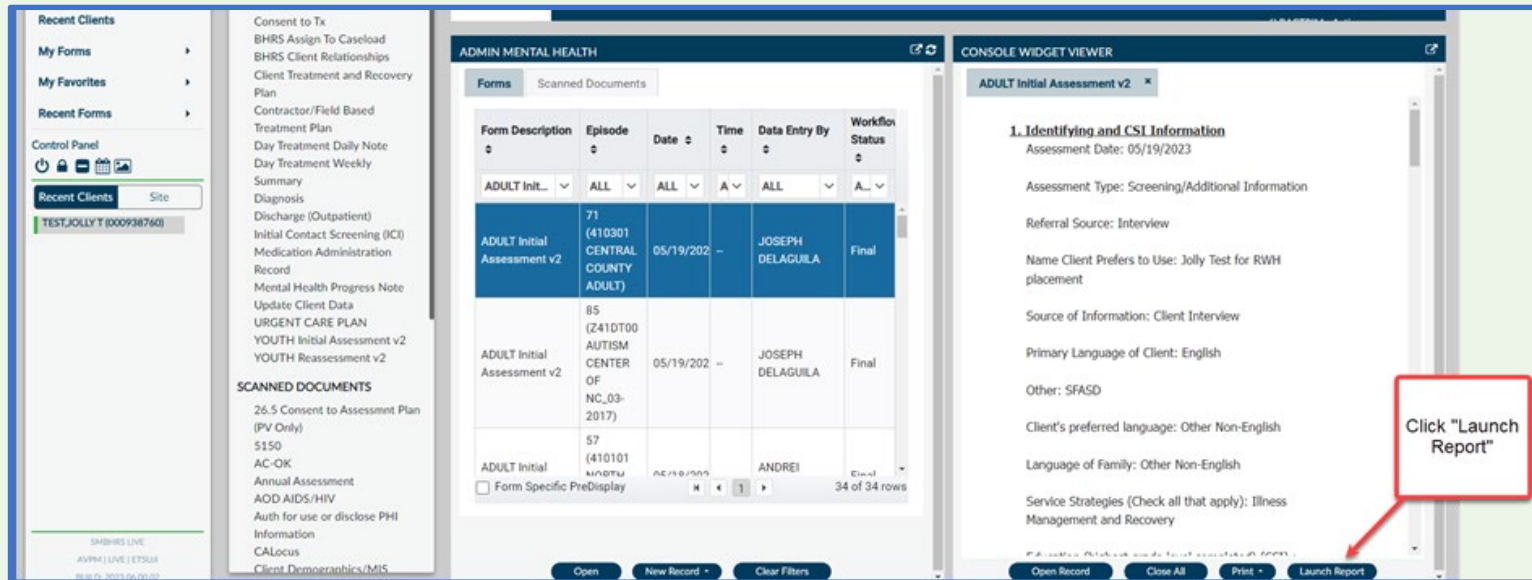
\*To print formatted versions of an individual progress note, please use the "Progress Notes Report" and select the date of the note you wish to print when generating the report. Instructions on how to print using Avatar reports are included in the next question.

**Step 1)** Select a client.

**Step 2)** Click on the **Documentation** Tab. You should see the Forms widget and a Console Widget viewer. Click on the drop down menu from the "Form Description" column of the forms widget and select the type of forms you're looking for.



**Step 3)** Double click on the form you would like to print. Then click on “Launch Report”



**Step 4)** Click on “Print Report” located on the top left corner of the window to print a copy for your client.



## Printing Multiple Forms

The following are the most commonly used reports for Client forms. You can add these forms to your "[Favorites](#)" to easily access them in the future.

All Adult Assessments V2

All Youth Assessments V2

Client Treatment Plan V2

Progress Notes Report

DX from Assess. ADULT





DX from Assess. YOUTH

When searching for a report, make sure that the item you select is a "Report" (see screenshot below)

Here is what I found: ✕

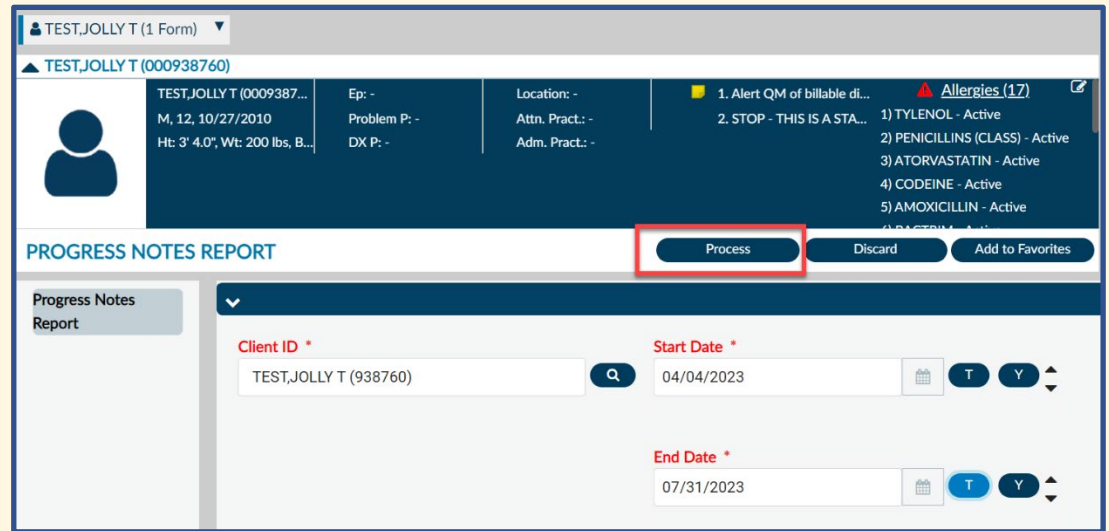
All 4 Clients 0 Staff 0 Forms 4

Forms

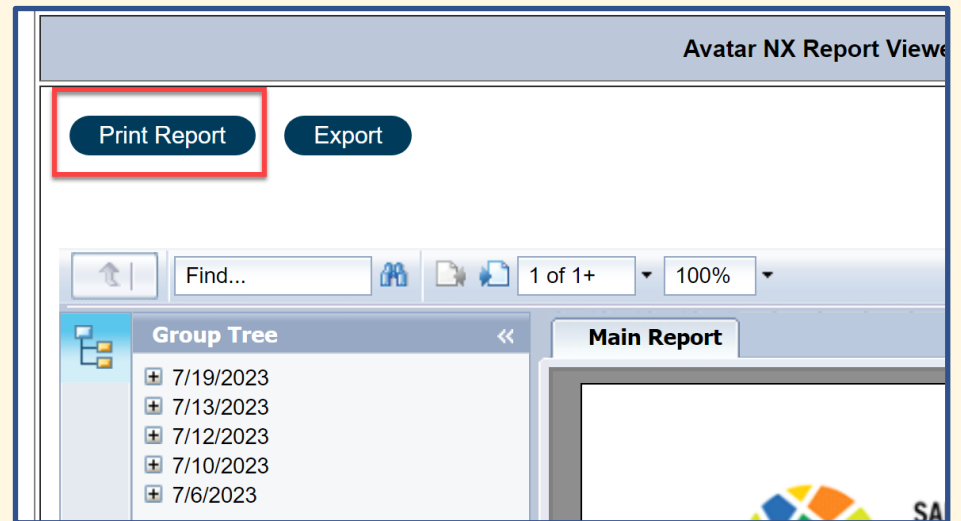
Undock	Name	Menu Option
	Client Treatment Plan V2	/ Avatar PM / <b>Reports</b>
	Client Treatment and Recovery Plan	/ Avatar CWS / Treatment Planning
	Client Treatment Plan Addendum	/ Avatar CWS / Treatment Planning
	BHRS Client Treatment and Recovery Plan	/ Avatar CWS / CWS Utilities / Treatment Plan Maintenance

Once you open the report, enter the date range for all the forms you would like to print.

Then select “Process” to generate a formatted PDF report.

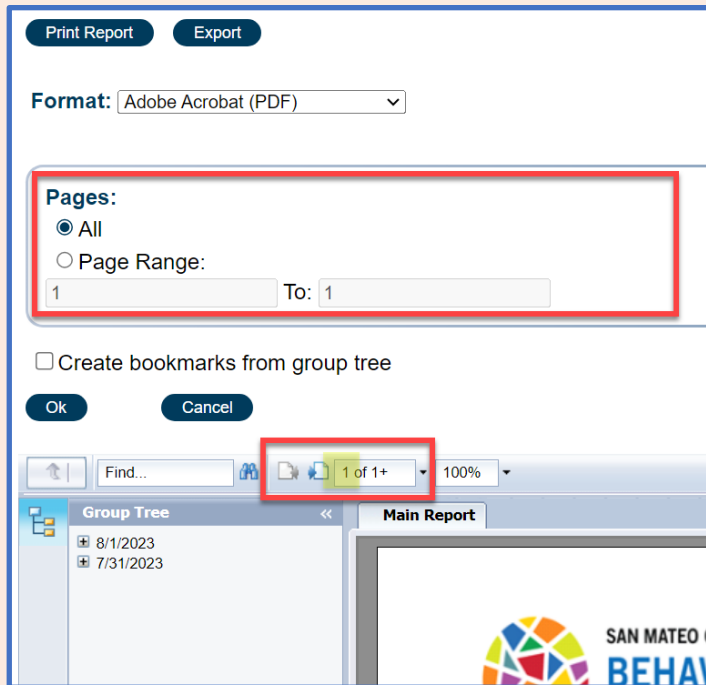
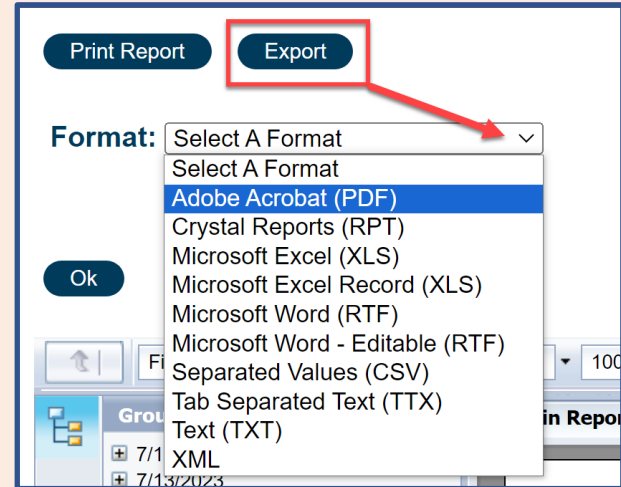


Select “Print Report” at the top left corner of the pop up window to print the report.



## Saving PDF Versions of Forms

You can save a PDF version of the report by selecting “Export” after you generate the report. Then, select the file type from the drop down menu that appears.



Use the page range feature to specify which pages to print. If you are not sure of which pages to select, scroll through the pages in the preview image and use the page number field to determine the page of the progress note you would like to print.

## Scanned Documents in NX

### 35.ISSUE RESOLVED: Mental Health Users Unable to view Restricted Scanned Documents

**Issue Reported:** Users reports that they were unable view restricted documents that were scanned into Avatar.

**Solution:** This has been fixed by the BHRS IT.

### 36.ISSUE RESOLVED: Problems Viewing Scanned Documents in Avatar NX

**Issue Reported:** Users reports that they were unable to use the scan feature and unable to view scanned documents.

**Solution:** This has been fixed by the vendor Netsmart.



## Section 6

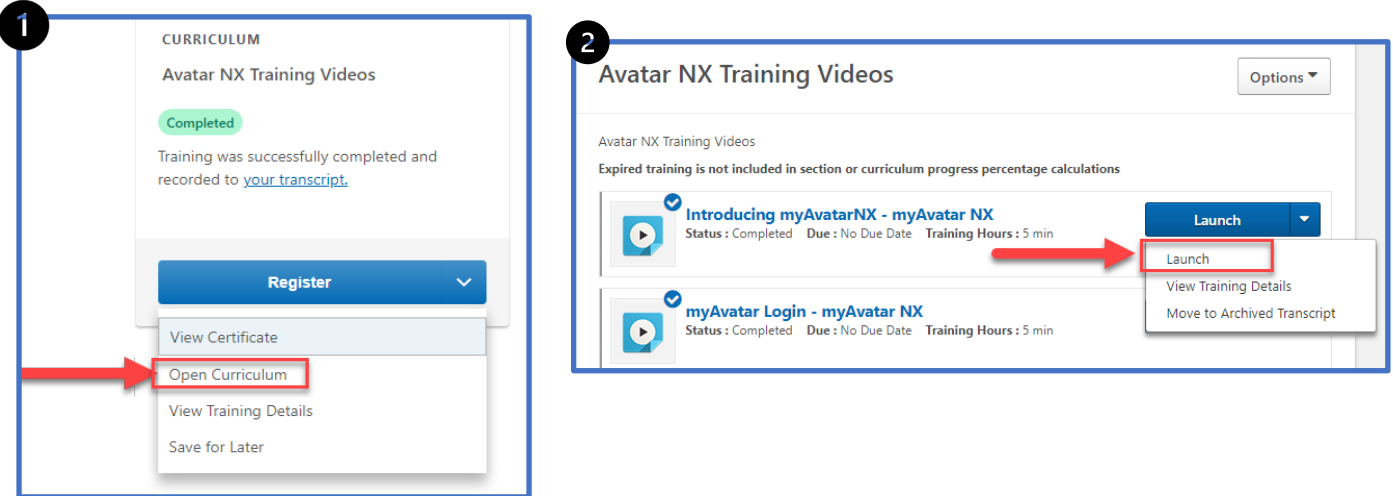
# Avatar NX Resources

- [Avatar NX Videos](#)
- [Need More Help with Avatar NX?](#)
- [BHRS Resources \(Avatar NX and CalAIM\)](#)

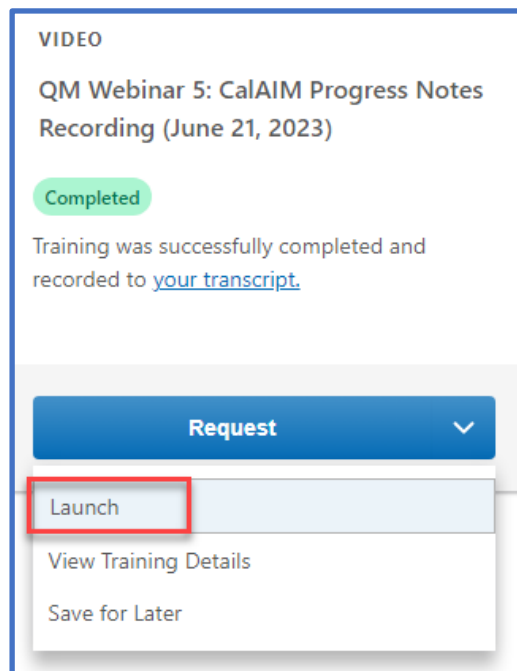
# Avatar NX Videos

## 37. Re-watching the Avatar NX Videos I already completed

We realize we are throwing A LOT of information at you at once! The benefit of having the trainings on LMS is that you are able to re-watch them after you've completed in case you need to review the information. The following steps can be done with any LMS training you've completed, not just the Avatar NX videos.















For some trainings, you can launch directly from the register screen because it is not part of a larger series of trainings (a.k.a. "curriculum").



38. I can't recall. Did the Avatar NX Training cover [X] topic?

See below for the list of all of the Avatar NX video topics that were included in the mandatory Avatar NX training curriculum in the LMS.

	<b>Introducing myAvatarNX - myAvatar NX</b> Status : Completed Due : No Due Date Training Hours : 5 min	Launch
	<b>myAvatar Login - myAvatar NX</b> Status : Completed Due : No Due Date Training Hours : 5 min	Launch
	<b>myDay View- myAvatar NX</b> Status : Completed Due : No Due Date Training Hours : 5 min	Launch
	<b>Nav Pane &amp; Access to Forms - myAvatar NX</b> Status : Completed Due : No Due Date Training Hours : 5 min	Launch
	<b>Activity Pane - myAvatar NX</b> Status : Completed Due : No Due Date Training Hours : 5 min	Launch
	<b>Searching in NX - myAvatar NX</b> Status : Completed Due : No Due Date Training Hours : 5 min	Launch
	<b>Docking &amp; Undocking Widgets/Forms - myAvatar NX</b> Status : Completed Due : No Due Date Training Hours : 5 min	Launch
	<b>Customizing Widgets - myAvatar NX</b> Status : Completed Due : No Due Date Training Hours : 5 min	Launch
	<b>Creating Favorites - myAvatar NX</b> Status : Completed Due : No Due Date Training Hours : 5 min	Launch
	<b>Control Panel - myAvatar NX</b> Status : Completed Due : No Due Date Training Hours : 5 min	Launch
	<b>Client Dashboard - myAvatar NX</b> Status : Completed Due : No Due Date Training Hours : 5 min	Launch
	<b>Quick Action Widgets - myAvatar NX</b> Status : Completed Due : No Due Date Training Hours : 5 min	Launch

## Need More Help with Avatar NX?

<b>BHRS IT</b>	<b>Okta:</b> Submit a Service Now ticket. <b>Email the IT Support mailbox:</b> <a href="mailto:bhrs-it-support@smcgov.org">bhrs-it-support@smcgov.org</a> <b>Call the ISD Help Desk:</b> (650) 573-3400
<b>BHRS QM</b>	<b>For General Questions, Email BHRS Ask QM:</b> <a href="mailto:HS_BHRS_ASK_QM@smcgov.org">HS_BHRS_ASK_QM@smcgov.org</a> <b>For Troubleshooting LMS Access, Email BHRS QM:</b> <a href="mailto:HS_BHRS_QM@smcgov.org">HS_BHRS_QM@smcgov.org</a>

**How do I know whether it's BHRS IT or BHRS QM to contact for my issue? I've contacted in the past only to be told I should contact the other unit.**

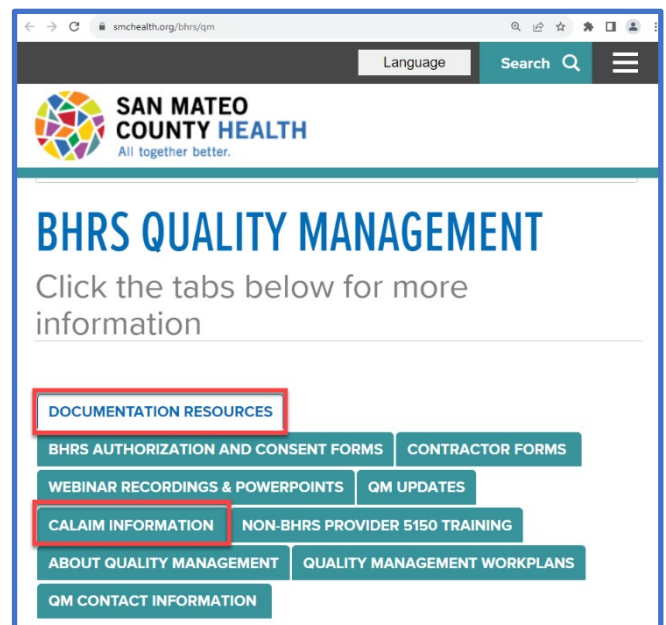
With the exception of password resets and other items specifically noted in this Avatar NX Updates document, all questions regarding Avatar NX should be sent to [BHRS ASK QM](#) (or [BHRS QM](#) if the issue is regarding your LMS account) QM will look into the issue and will let you know whether or not this issue requires a service request to BHRS IT.

*Please note that there may be some cases where the initial step is to contact one unit, and then there may be an additional step that must be completed by the other unit to resolve the issue completely.*

## BHRS Resources (Avatar NX and CalAIM)

The following are available on the [BHRS QM Website](#) under the "CalAIM" tab.

1. [BHRS CalAIM FAQ](#)
2. [BHRS Service Codes FAQ and Cheat Sheet](#)  
(Updated 8/1/2023)
3. **LMS Links to BHRS CalAIM and Avatar NX Webinars**
  - a. **BHRS Staff:** Access LMS through your Okta account, or click [here](#).
  - b. **Contract Agencies:** Click [here](#). (Don't have an LMS account set up? Create an account by clicking [here](#).)



The following is available on the [BHRS QM Website](#) in the "Avatar" section under the "Documentation Resources" tab.

1. [Avatar NX Updates and Tip Sheet](#) (Created 8/1/2023; Updated monthly)

Updated: 2/13/2024

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