SAN MATEO COUNTY HEALTH
All together better.

Netsmart myAvatar™ NX

Issue 5
February 2024

Avatar NX Updates and Tips

Contents

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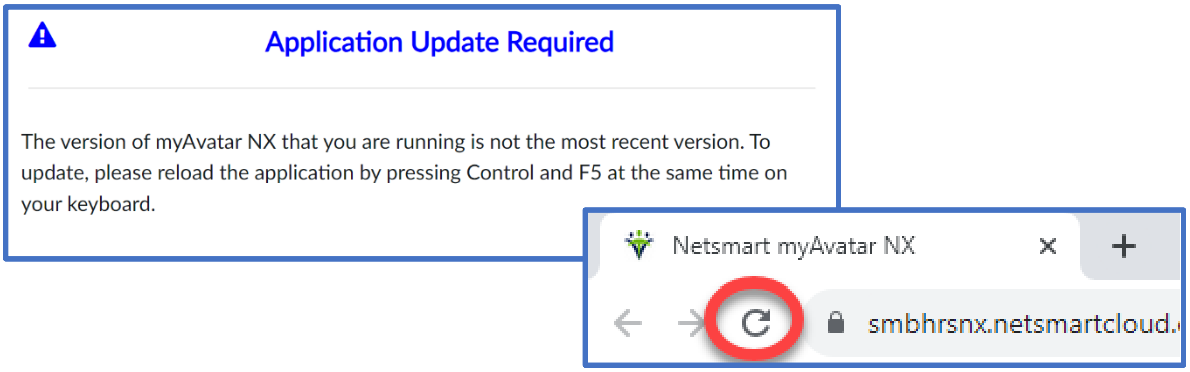
Section 1

Avatar NX:
The Basics

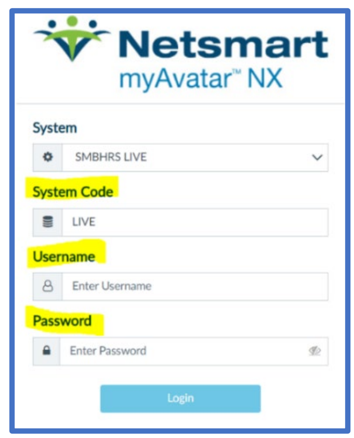
Accessing Avatar NX

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.

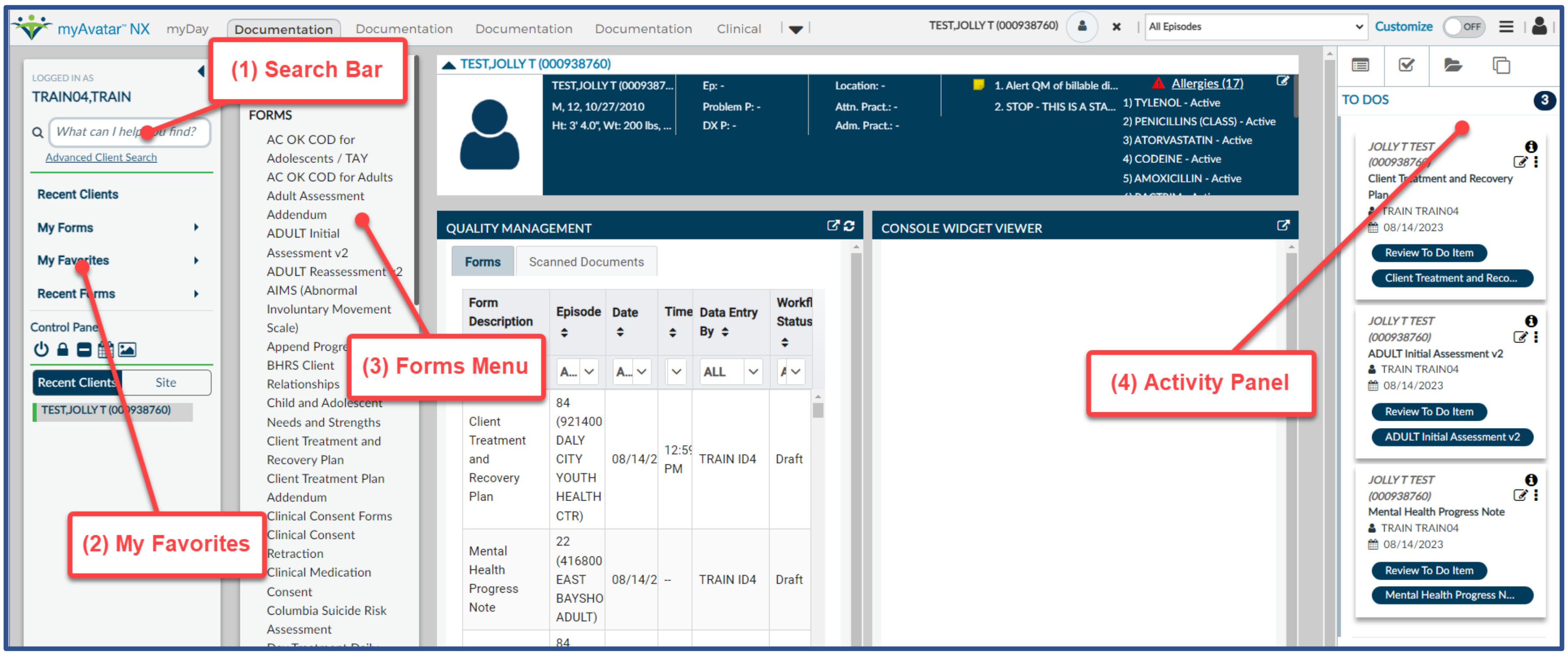
- Please make sure that **System Code** field is set to the System Code that you were assigned (e.g., LIVE, LIVESMMH, LIVEEC, etc.). If you are unsure of what code you were assigned, contact BHRS IT.

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

Menus and Task Bars

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

	(1) Search Bar	(2) My Favorites	(3) Forms Menu	(4) Activity Panel
View Tab	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.



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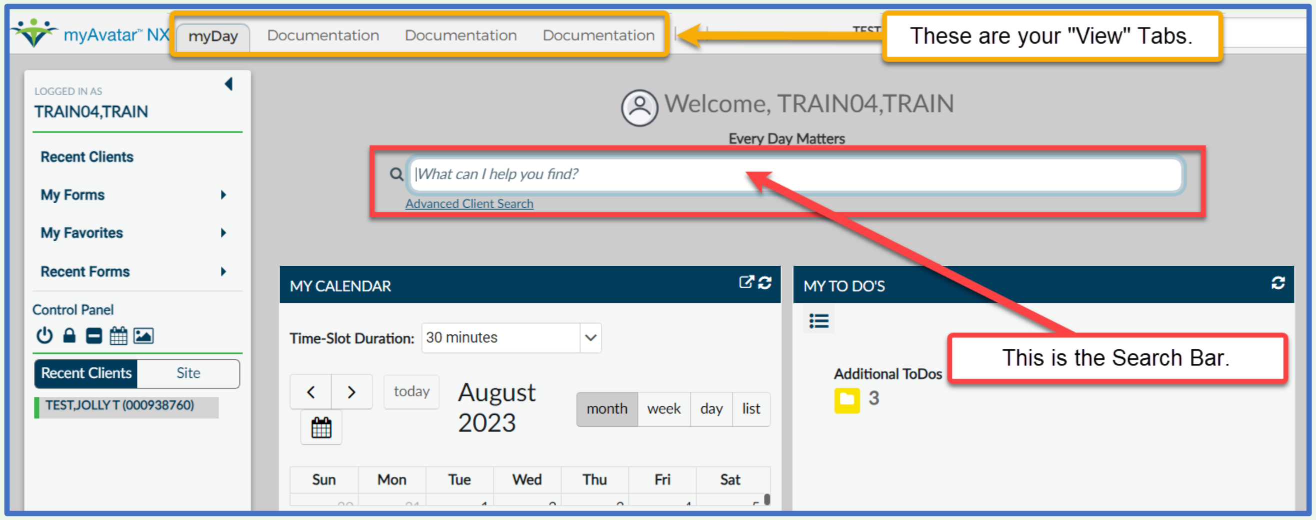
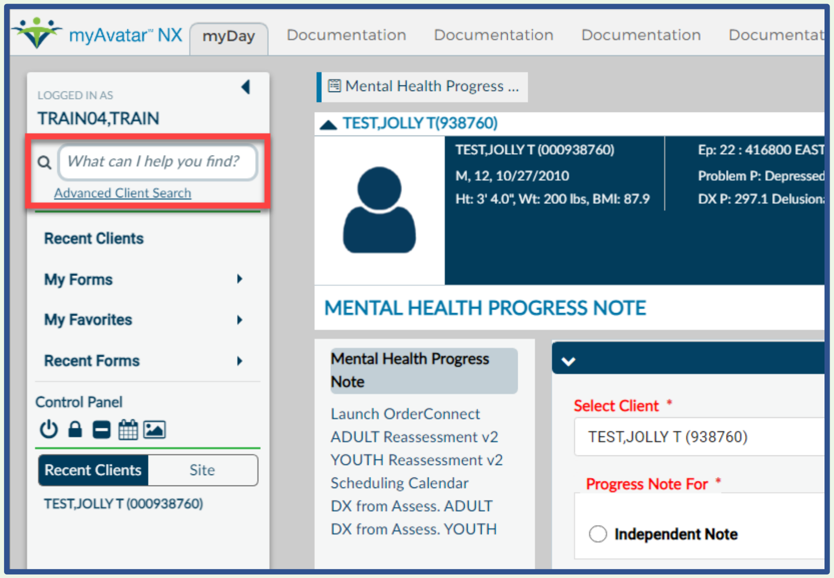
(1) Search Bar



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

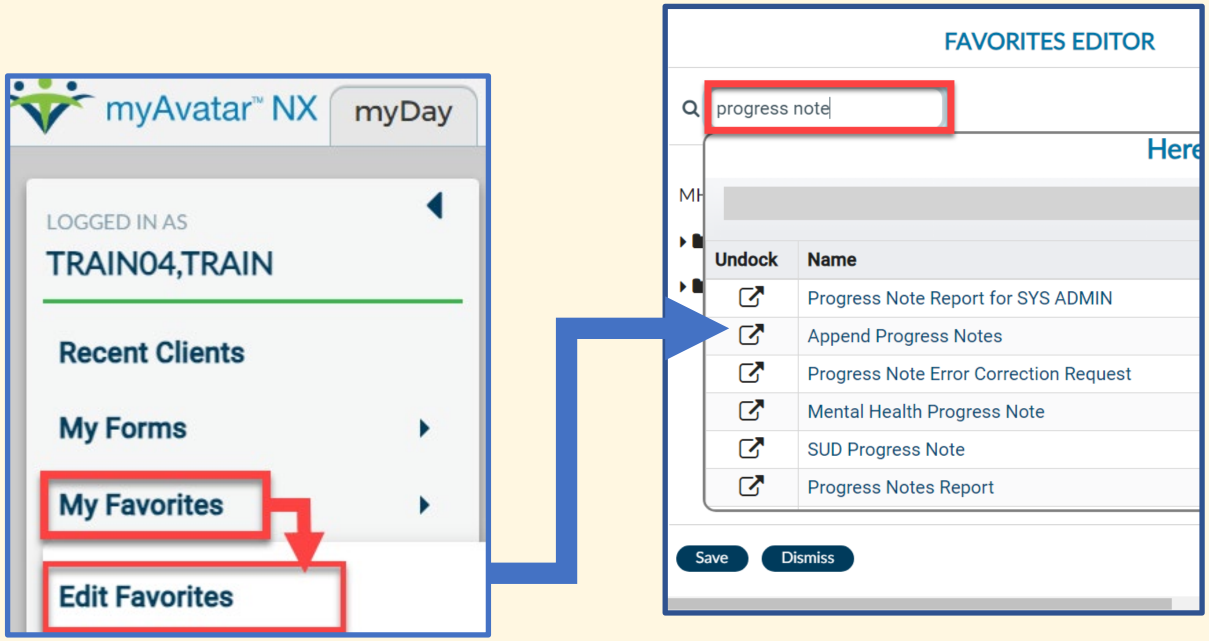
The search bar is on the top left side panel when you are in any of the other view tabs or have a frm open.



(2) My Favorites

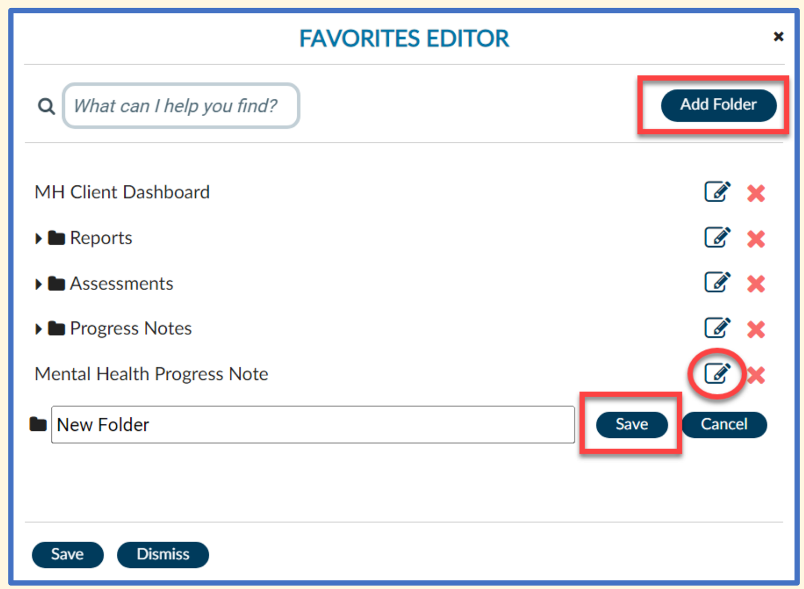
If you would like to save your frequently used forms in one easy place, we recommend using the “My Favorites” feature in you left hand Menu bar.

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.

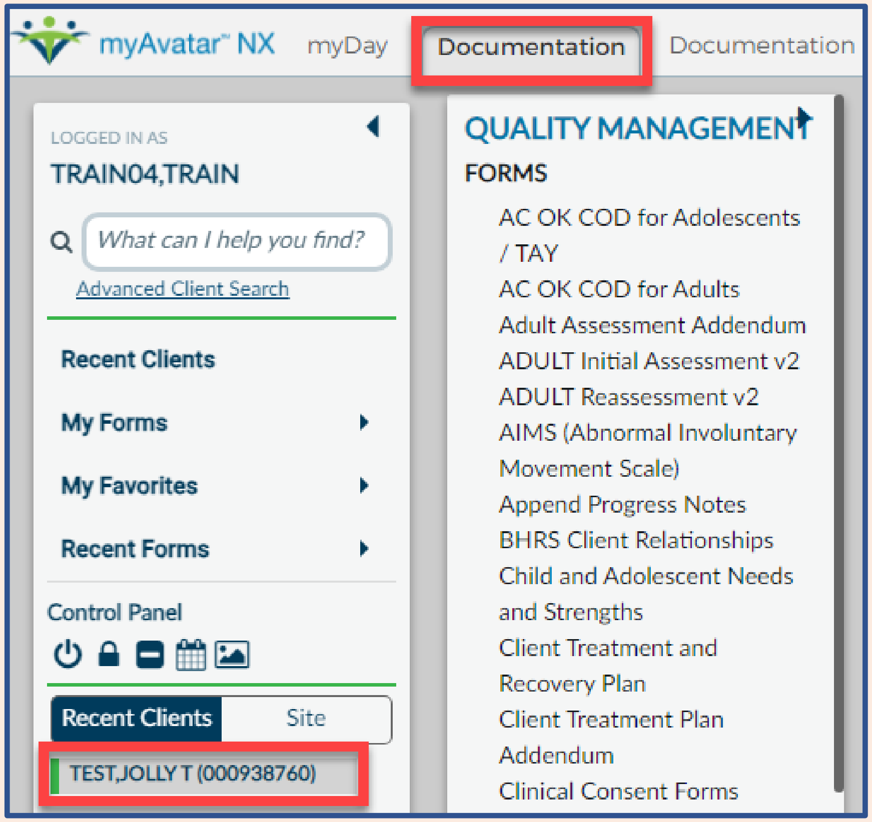
To reorganize items or put items into folders, simply click on the item you want to move and drag and drop to the desired location.



(3) Forms Menu

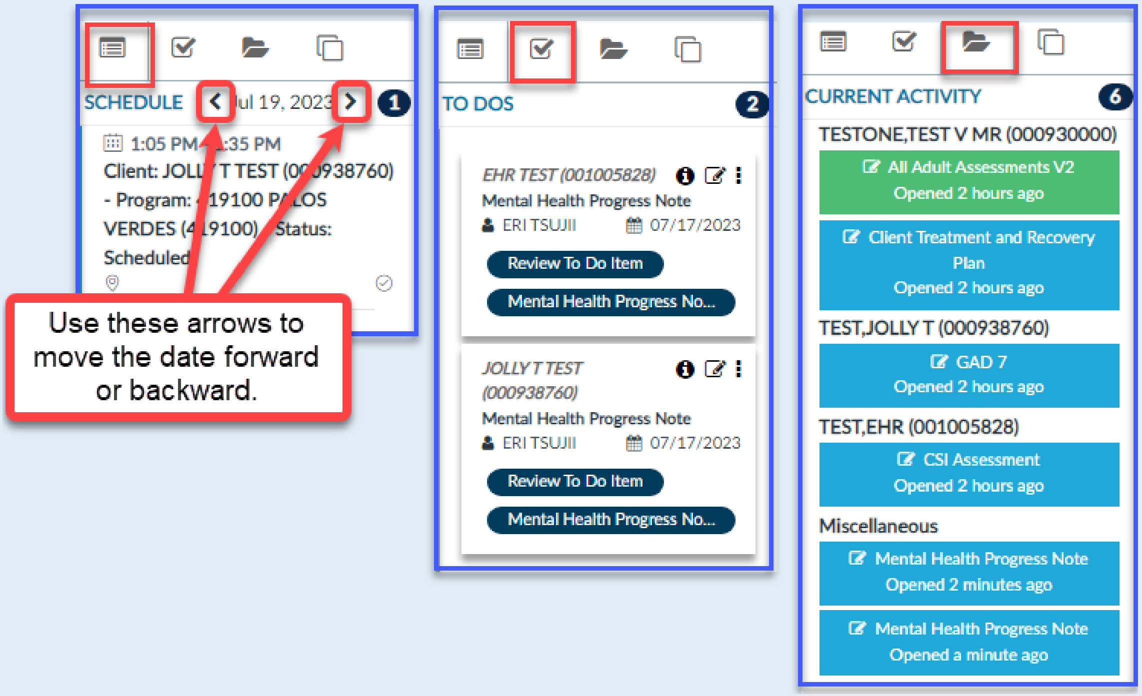
In the old Avatar, there was a menu bar that listed all the documents available to view/open was always visible whenever the application was open. With Avatar NX, **the menu bar is still there** but it's only visible after you select a client.

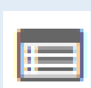
To view the menu bar in Avatar NX, first click on the client, then click on the "Documentation" tab at the top of the screen (see screen shot to the right).



(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.





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.

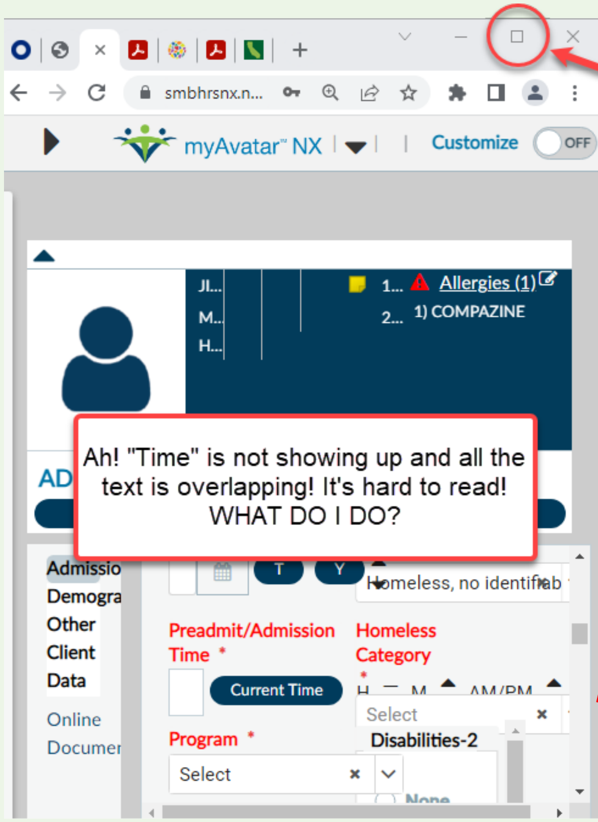
4. Ways to adjust how Avatar NX looks.

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.

	[Zooming In/Out](#)	[Customizing Your Widgets](#)	[Undocking Widgets](#)
Problem	• Can't see boxes to enter data • Putting data in the text box, but it's not showing what I entered • Words on form overlap. • Form looks messy and disorganized. Text on form doesn't line up or skips to another line for no reason. • 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.	• Takes too much scrolling to get to the widget I need • Too many widgets I don't need are on my screen • Missing a widget that I should have	• Widget box is too small • Want to view contents in widget while simultaneously exploring other information in client's chart.

Zooming In/Out

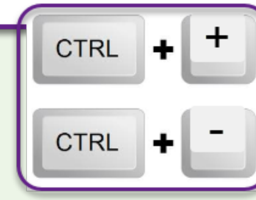
Can't input date or time into date/time fields? Text overlapping in the window? Before submitting a support request to IT/QM, see if magnifying or reducing the size of the window/text solves the issue. For example:



Click this square to make window bigger

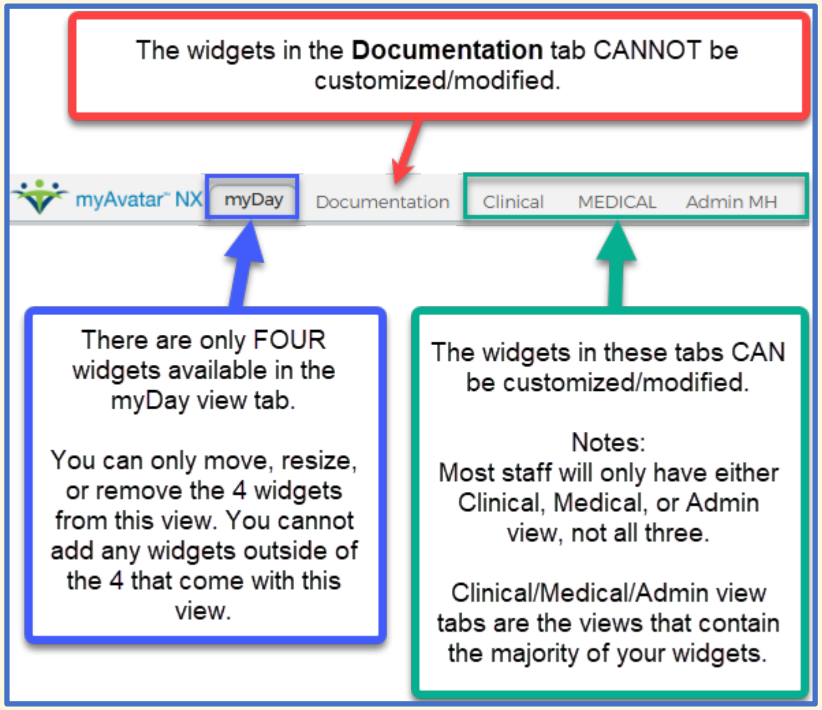
Hold down **Ctrl** on your keyboard while rolling your **scroll button** on your mouse (see where arrow is pointing on image below). Scroll forward to make bigger and scroll back to make smaller.

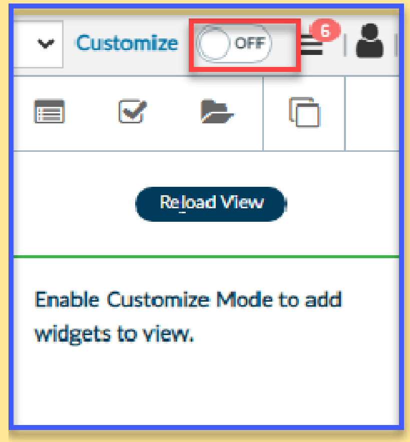
OR... Hold down **Ctrl** while clicking the **+** or **-** keys on your keyboad.



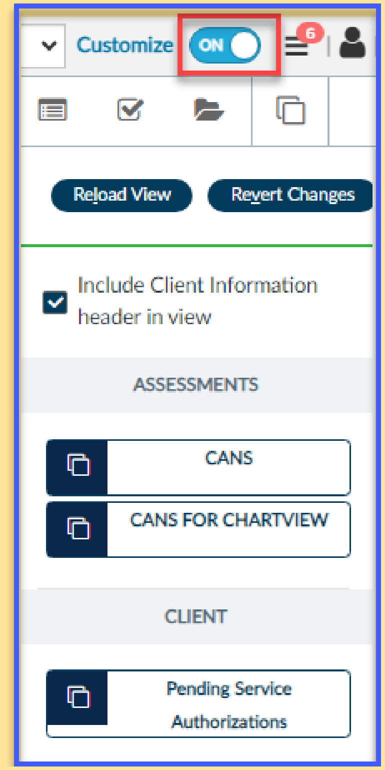
Customizing Widgets

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.”





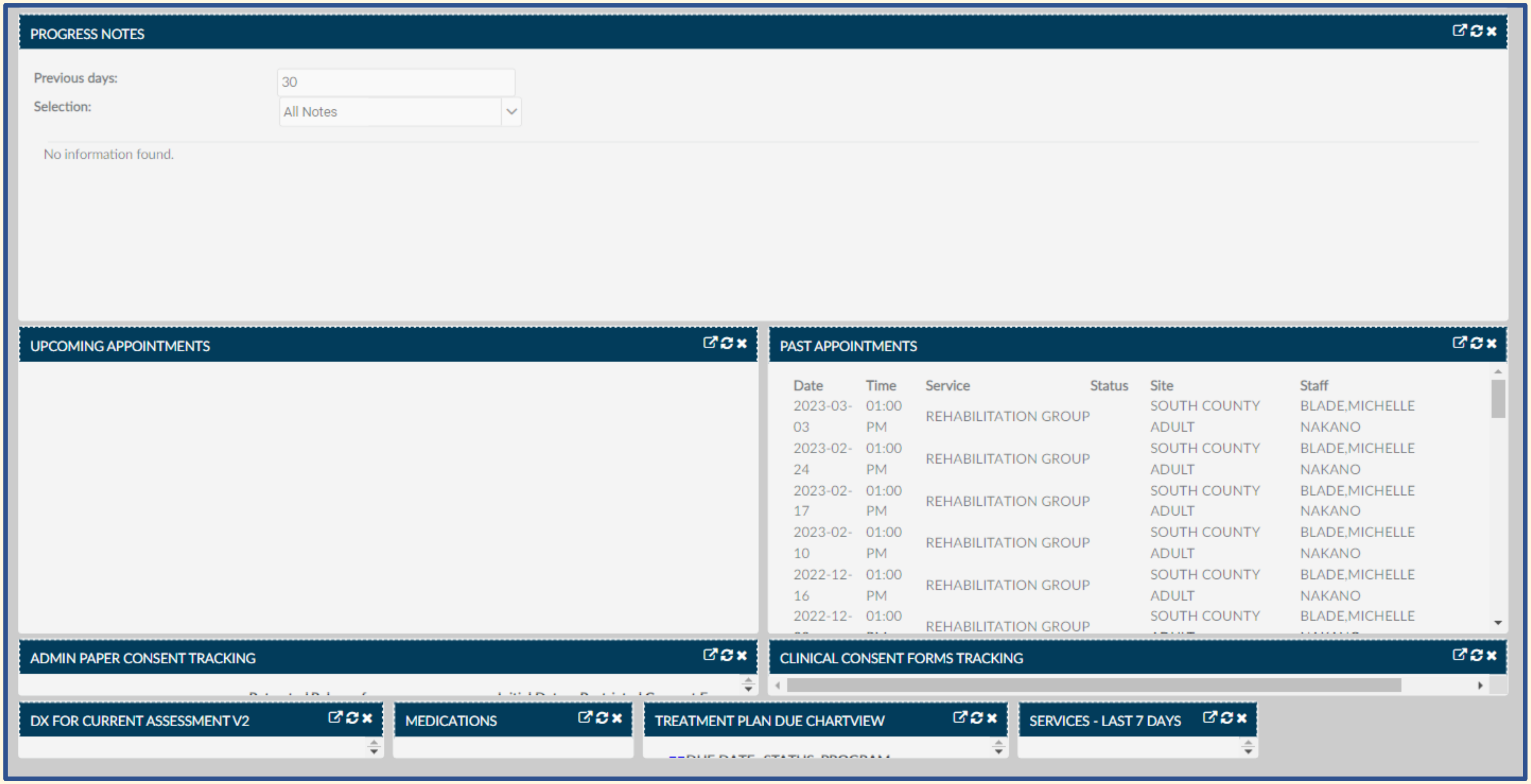
Click on the ON/OFF button to be able to customize the widgets. “ON” means you are going to edit. After you edit, click the switch to “OFF” to save your changes.



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.



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

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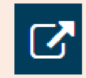
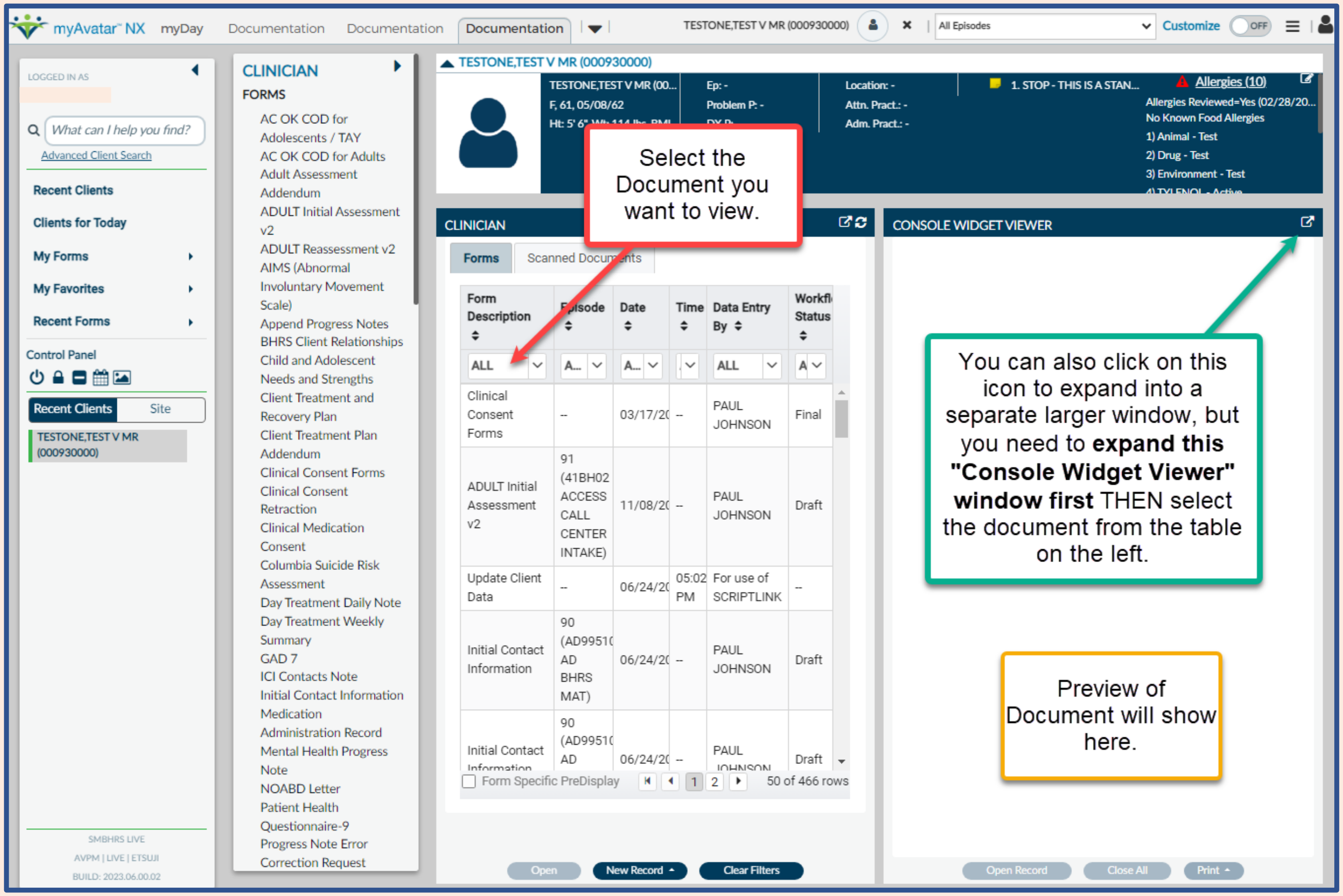
Undocking Widgets

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.

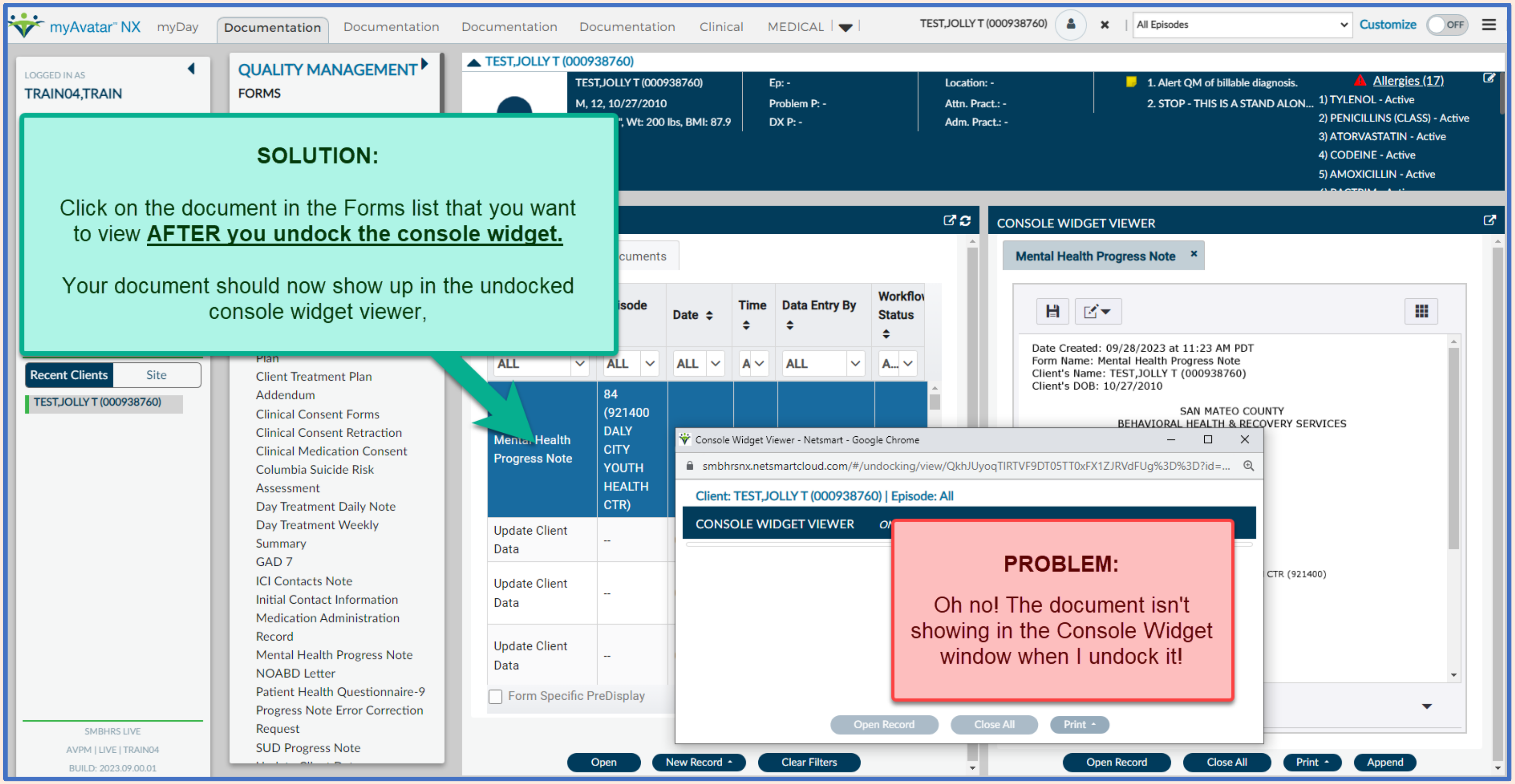


You can undock other widgets, not just the Console Widget Viewer, as long as it has the undock icon at the top right corner of the widget.

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.



Appointments / Calendars

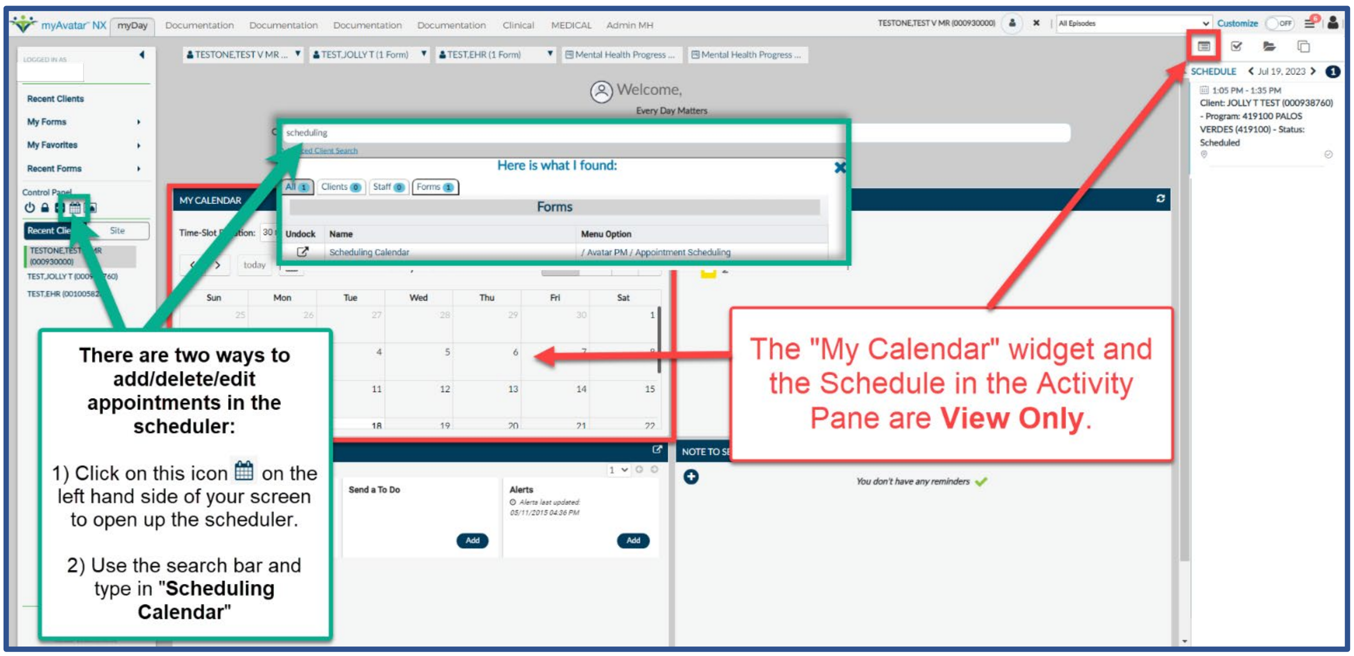
5. How do I link Outlook to my Avatar Calendar? I thought this was possible.

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!

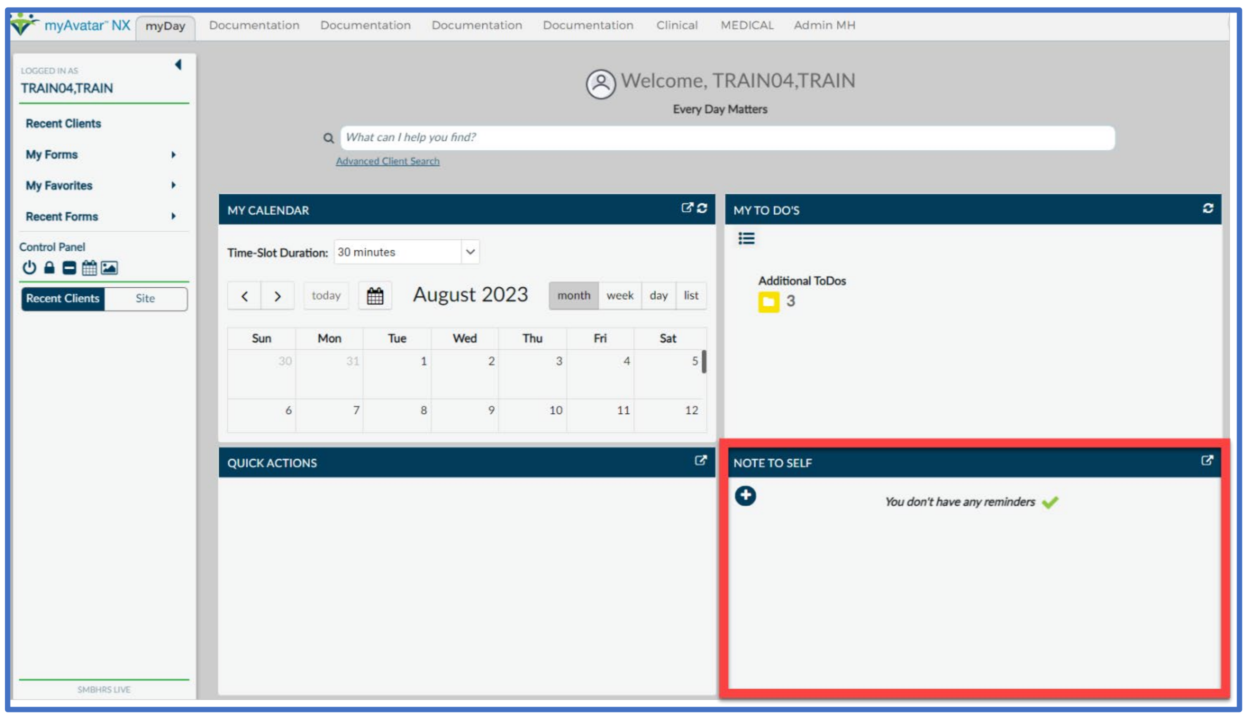
QM, IT, and MIS are aware of this issue and are working to address this issue as quickly as possible. Thank you to staff for alerting us of this! We will update staff as soon as a "fix" is available.

Notes Features in NX

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

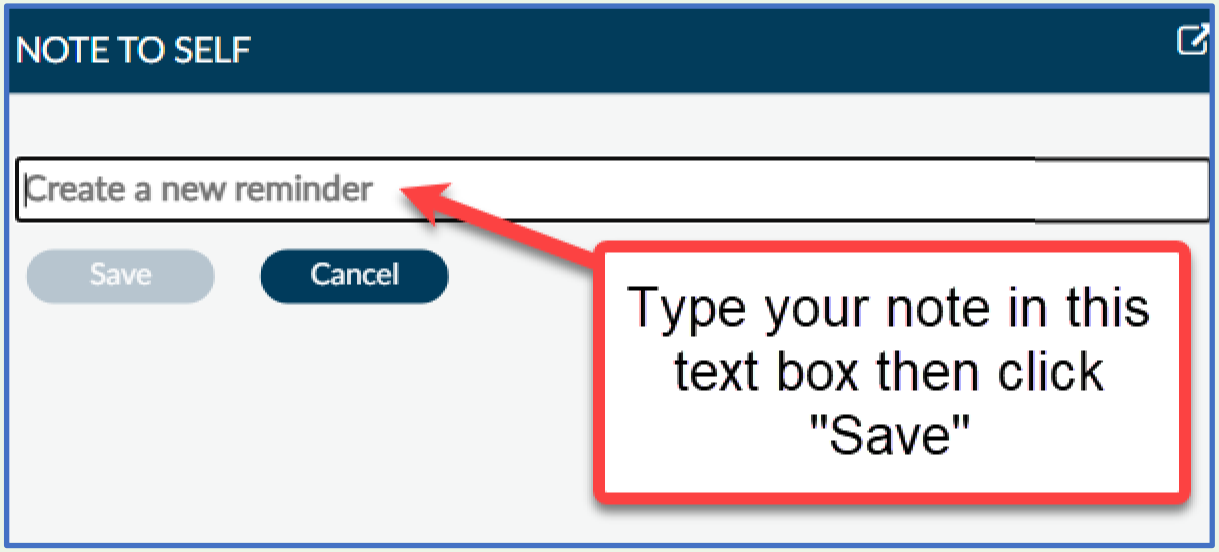
There are two types of “Notes” available in Avatar NX.

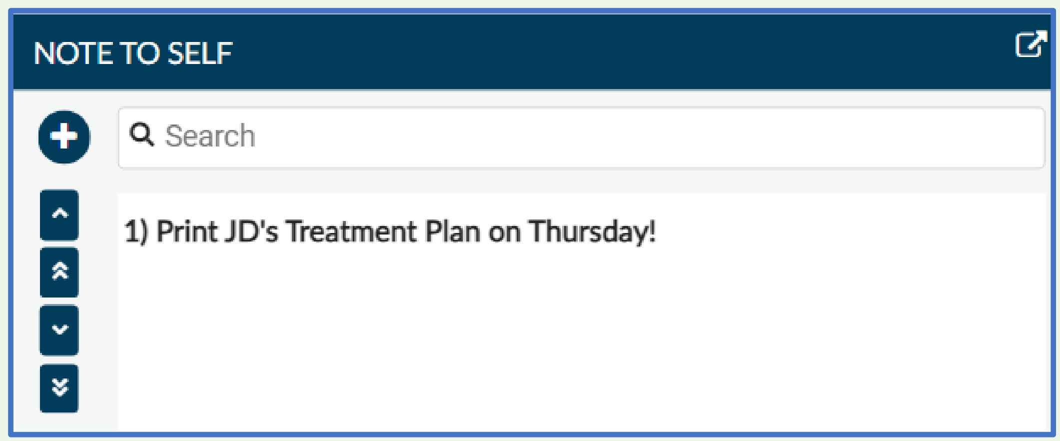
	“Note to Self”	“Notes” in Forms
Location	MyDay Tab	Available on some forms but not all
Description	Functions like a “post it note” in Avatar that only you can see.	Can be seen by all staff who have access to the form. Does not print out as part of the formal reports, but can be seen by anyone who has 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

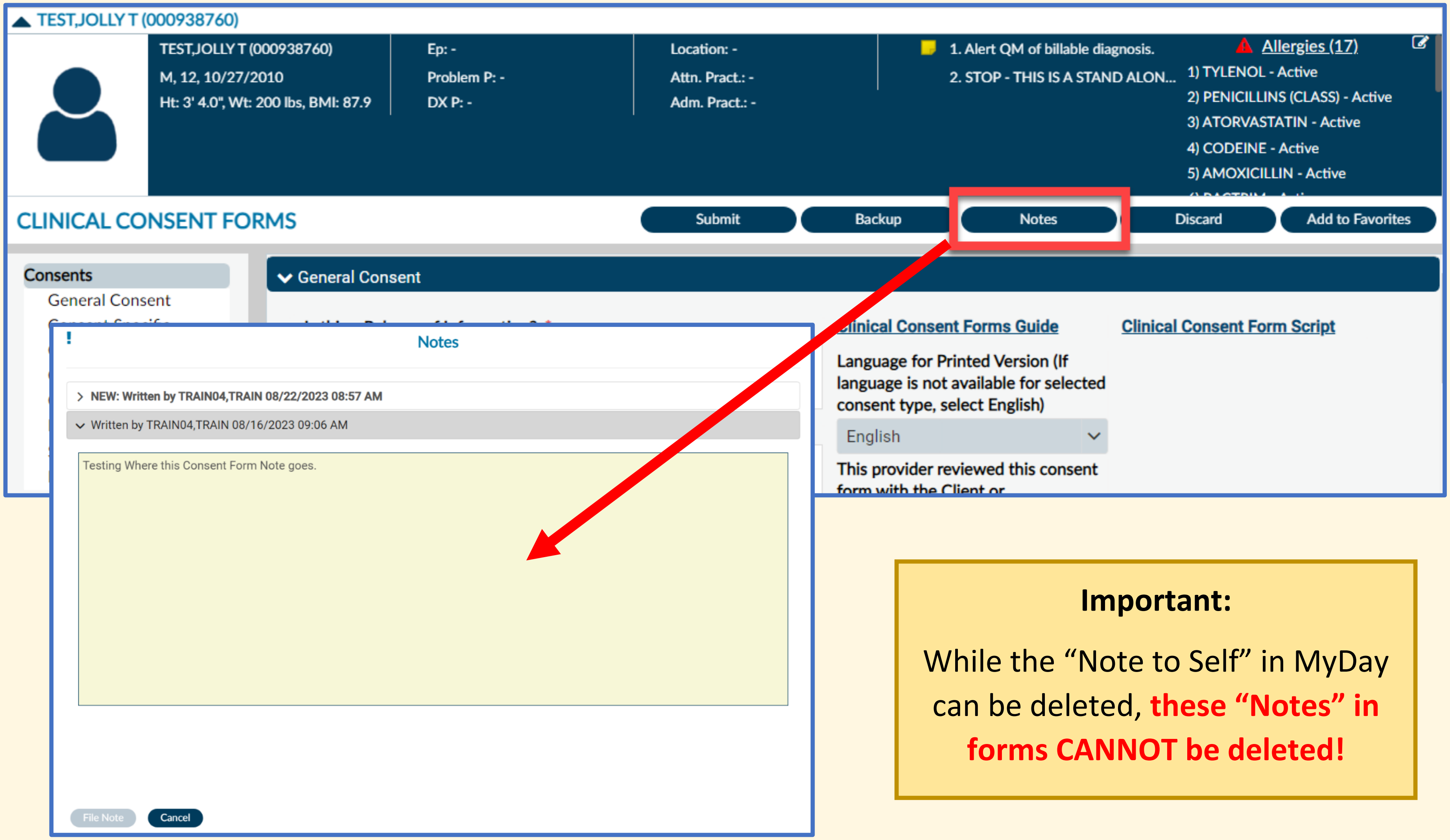
The “Note to Self” widget in the MyDay tab is available for you to write a note to yourself. Only you are able to see this note and you can add, edit, or remove the item yourself.





“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.



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 *(available with Generic Access widget)*
Clinical Consent Retraction	GAD 7
	Columbia Suicide Risk Assessment

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

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Section 2

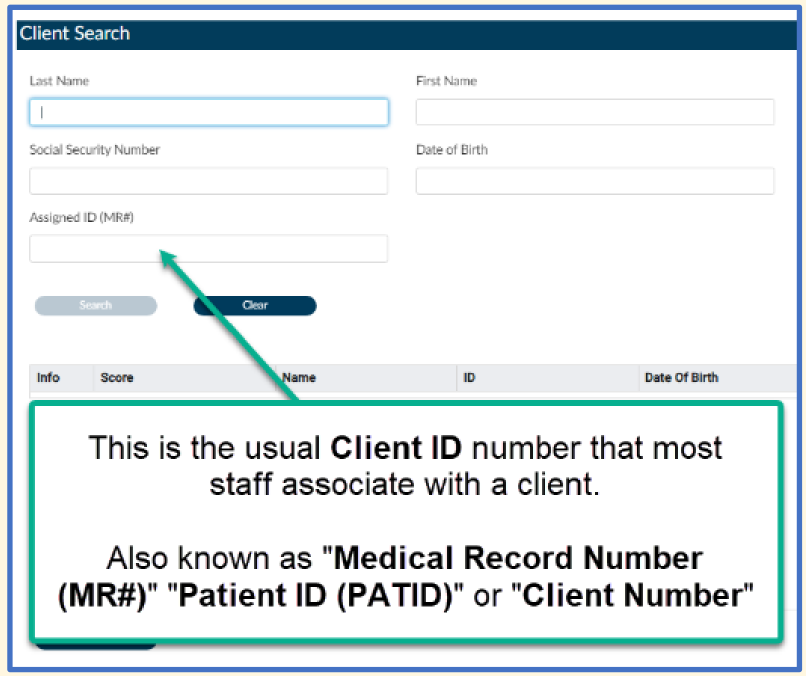
Client's Charts

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

10.Finding Clients in NX

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

Basic Search Using Search Bar	Advanced Search
• Center of MyDay View Tab screen • Left hand side panel of NX	• Available on some forms but not all
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. See Search Bar section for information on where to find the search bar.	If you click on the "Advanced Client Search" link underneath the search bar, you will be able to search for clients using multiple criteria. 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#).

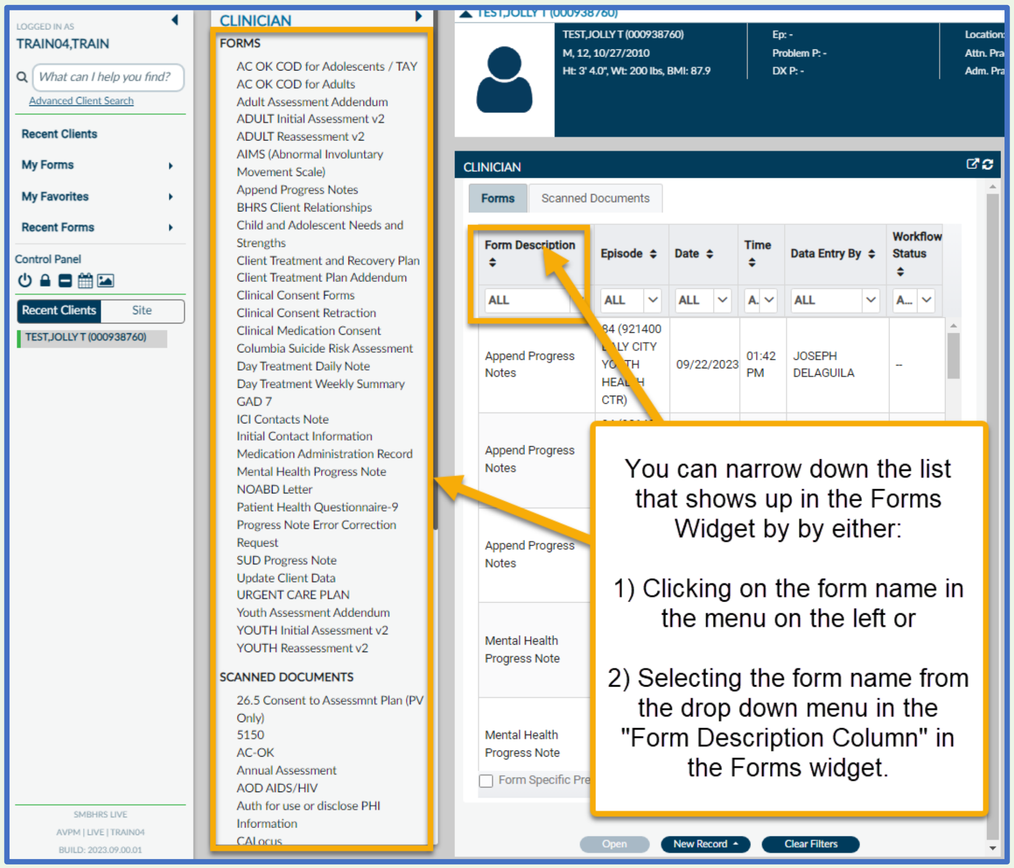


11.How do I open existing forms for clients in NX?

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**.



This method allows you to view either

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

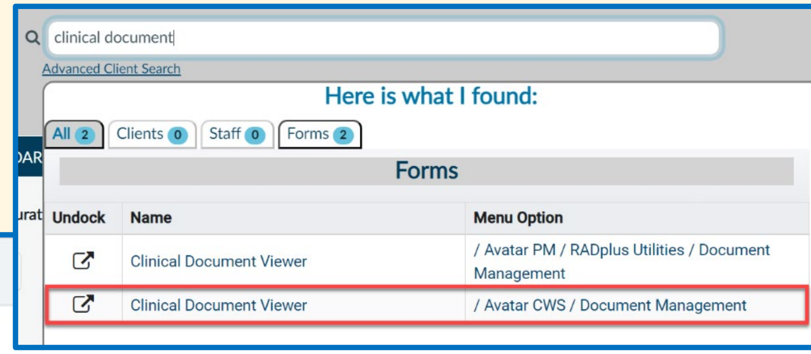
First, select either the "Forms" or "Scanned Documents" tab depending on the type of document you want to view.

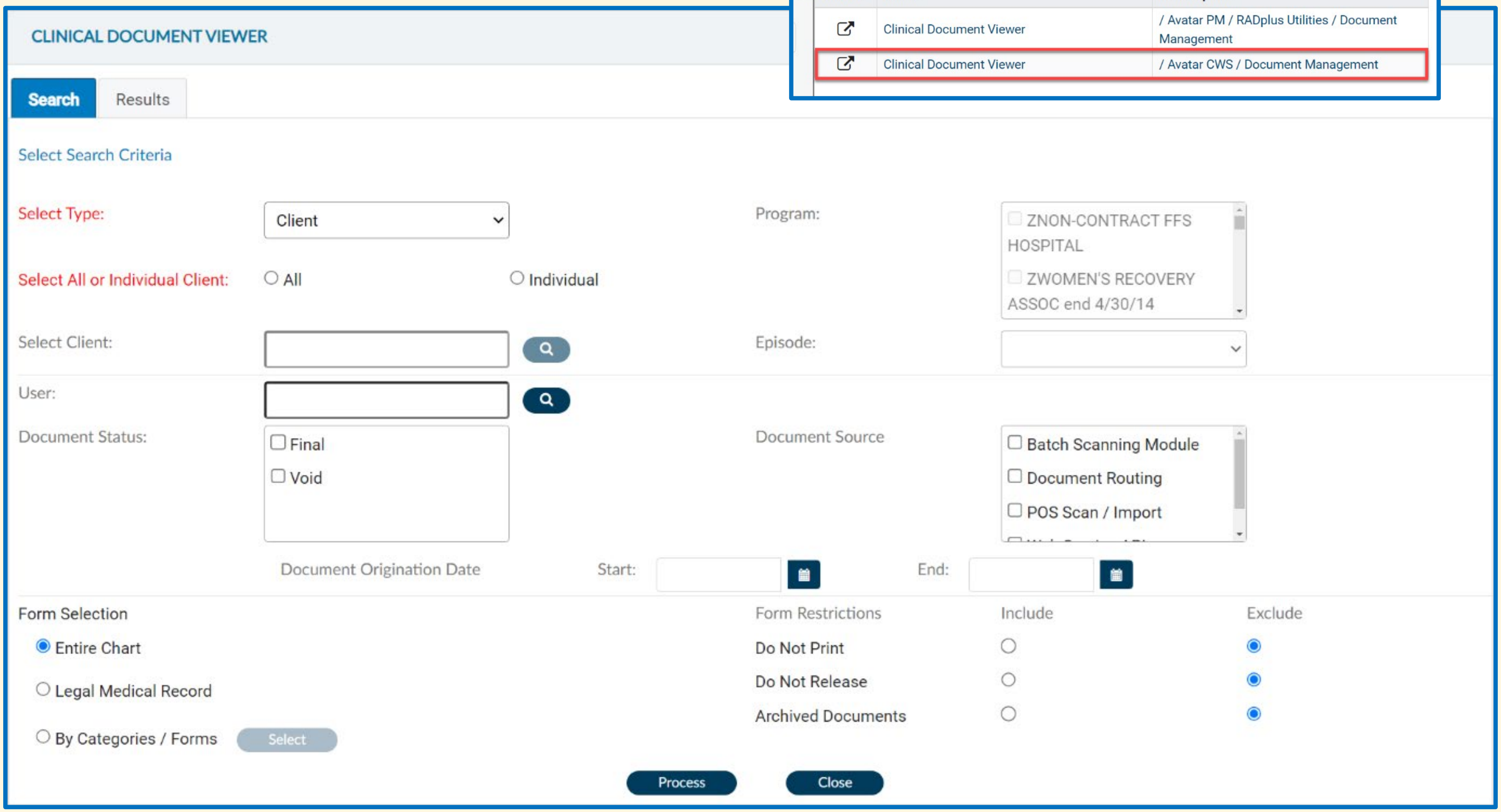
Once you select the tab you want, you can further filter by clicking on the desired document on the forms menu or using the drop down menu in the "Form Description" column.

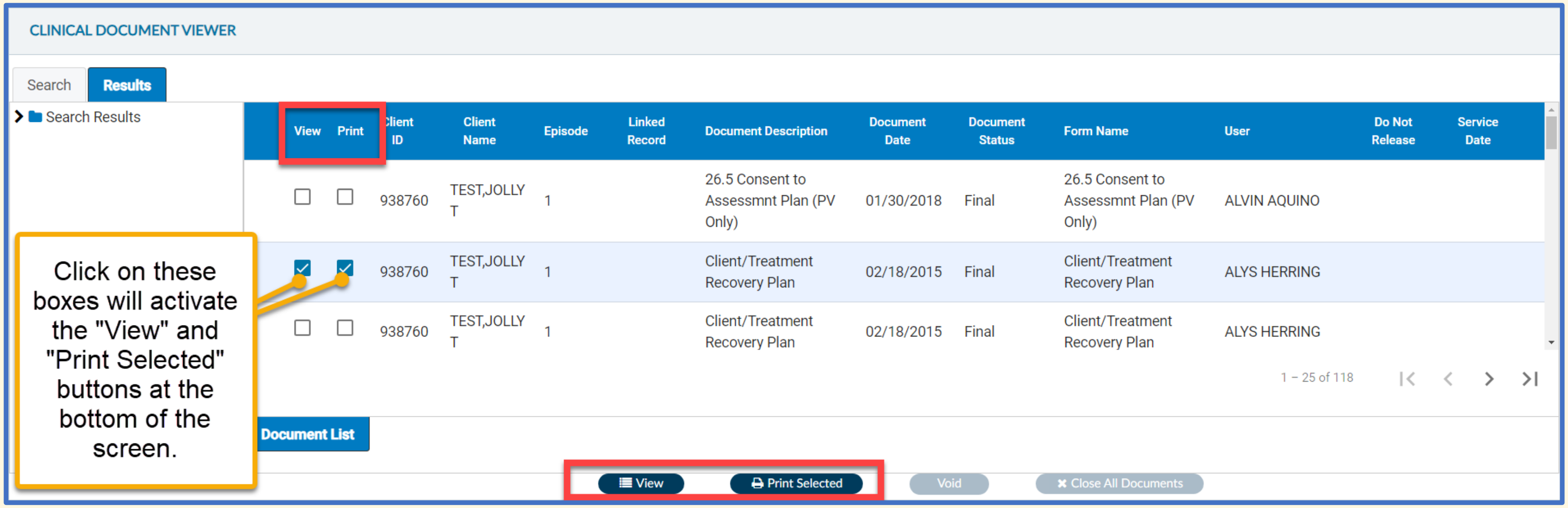
When you find your document on the list, double click it and it will show up in the Console Viewer to the right of the Forms Widget.

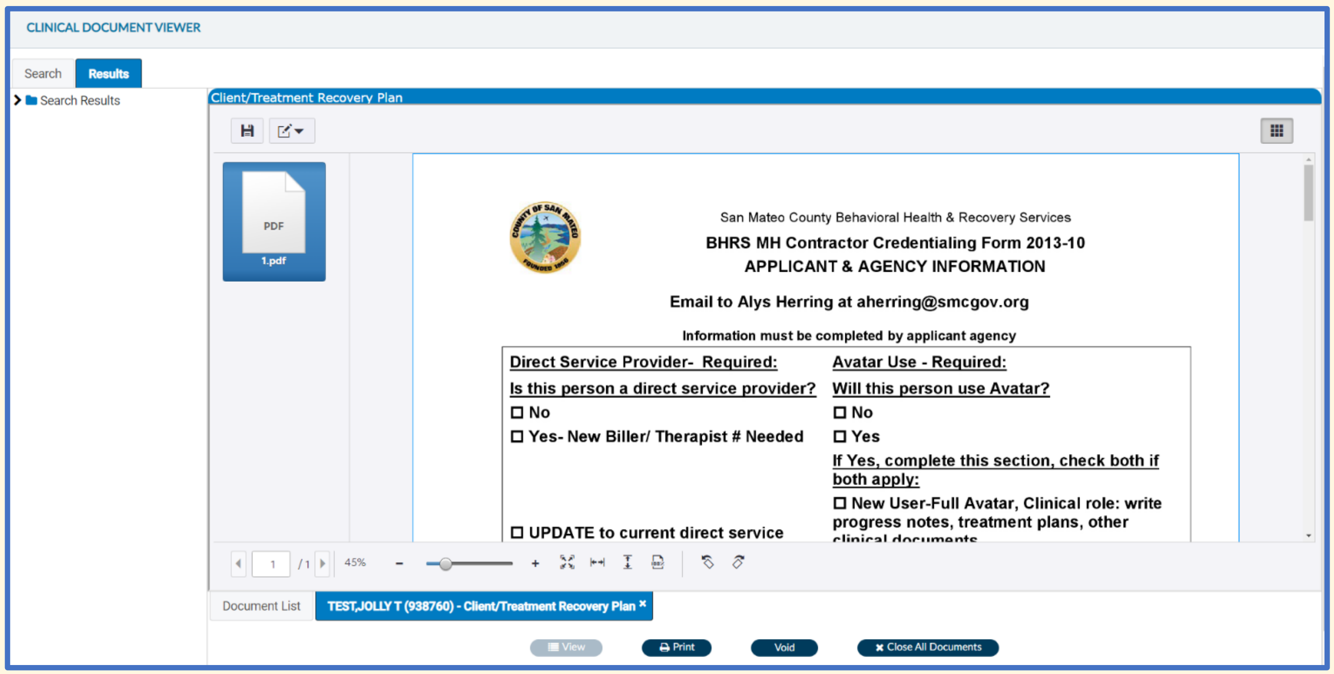
Clinical Document Viewer

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.









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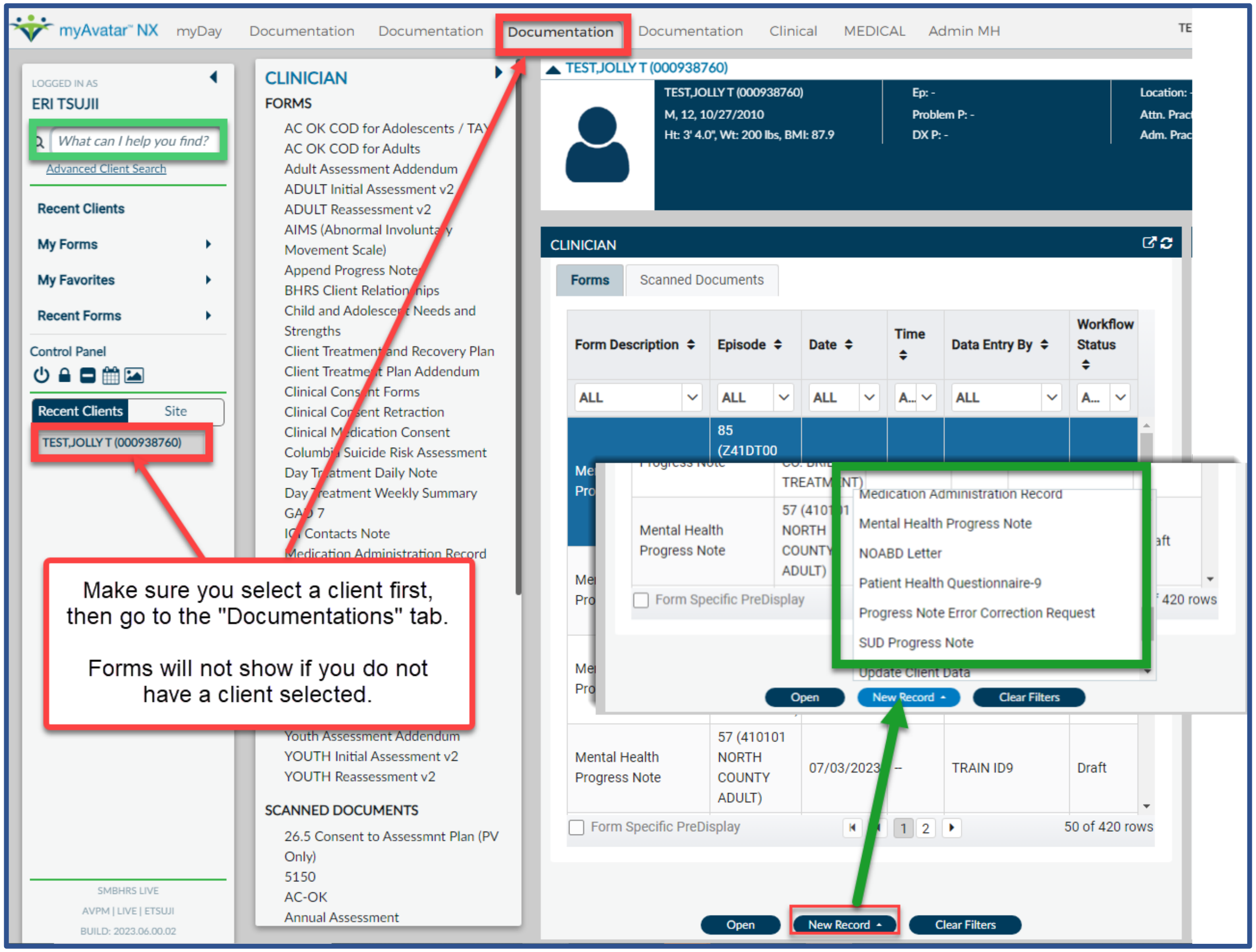
12.How do I open new forms for a client?

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.



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

13.How to Open Multiple Forms for the Same Client

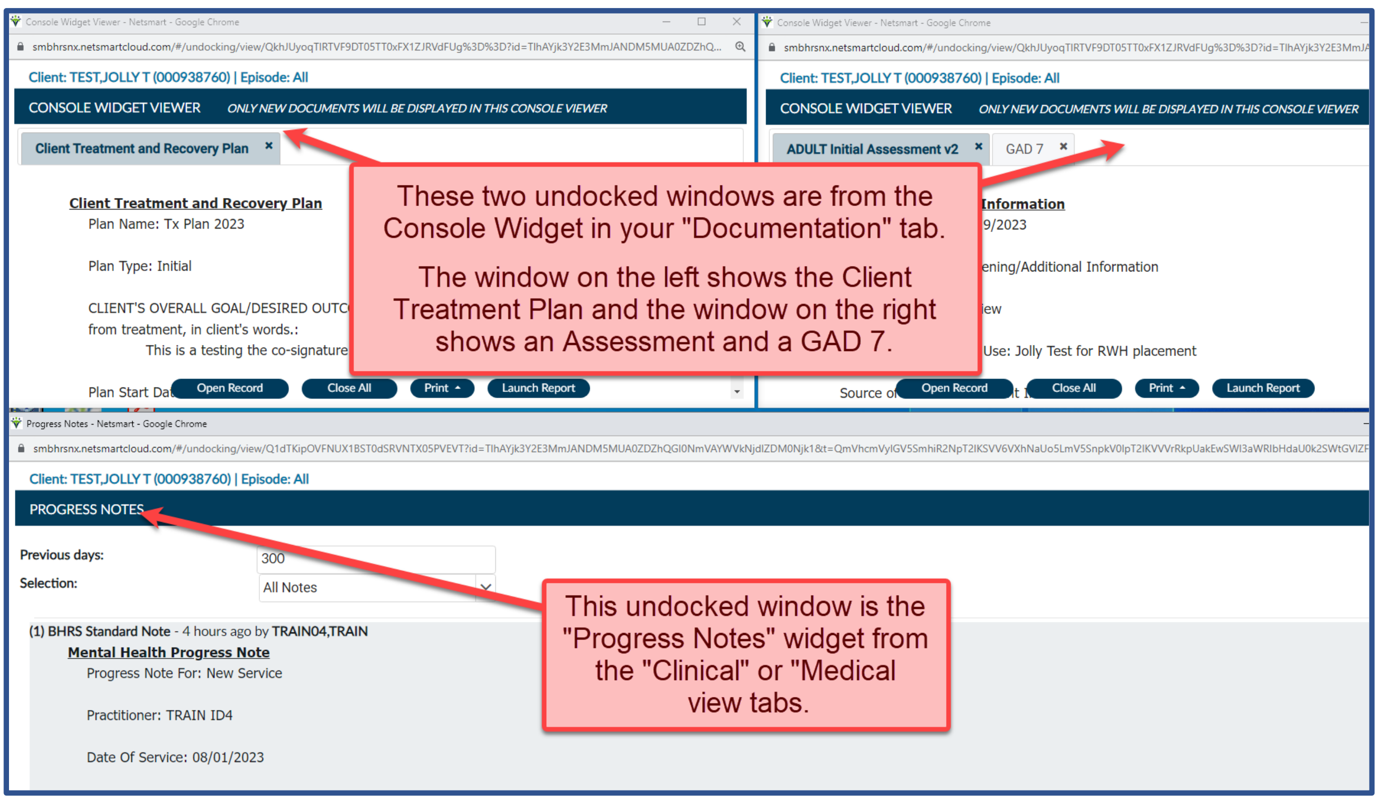
Sometimes you might be working on a client's chart and would like to view multiple documents for the same client simultaneously (e.g., while you are working on an assessment, you want to view the latest treatment plan, last assessment, and progress notes).

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.

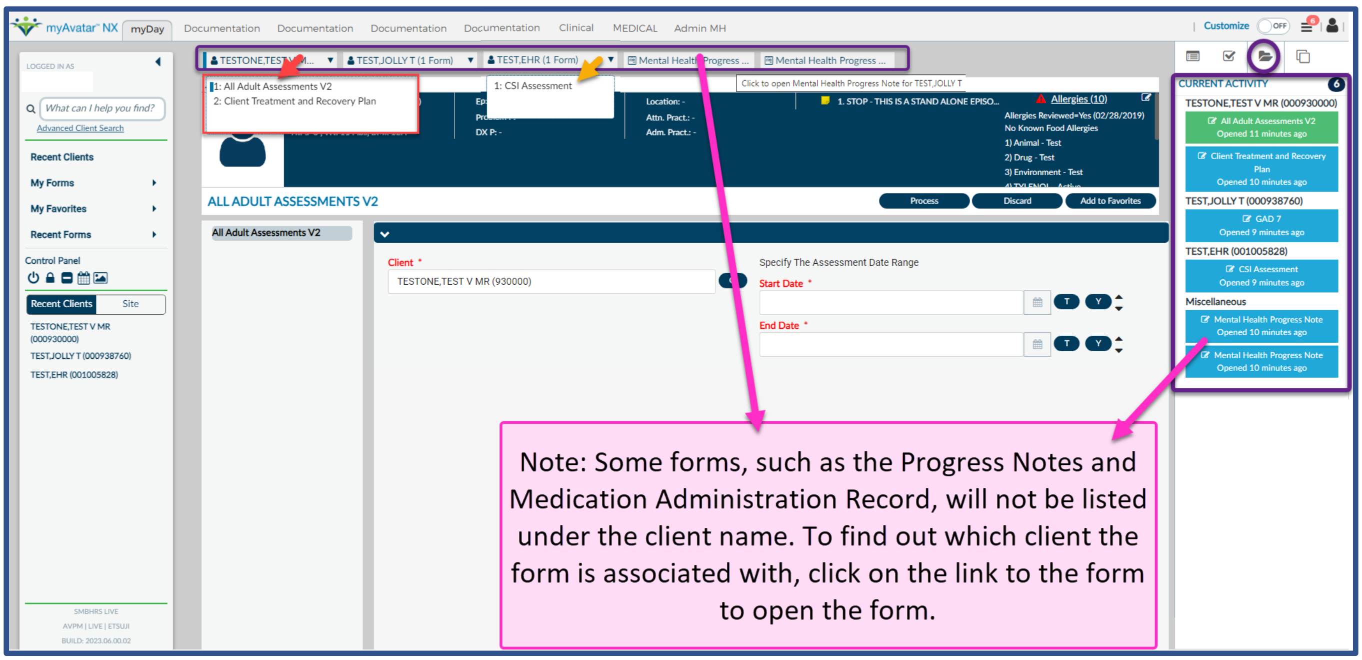


14.How to Open Multiple Charts/Forms for Multiple Clients in Avatar NX.

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).



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.

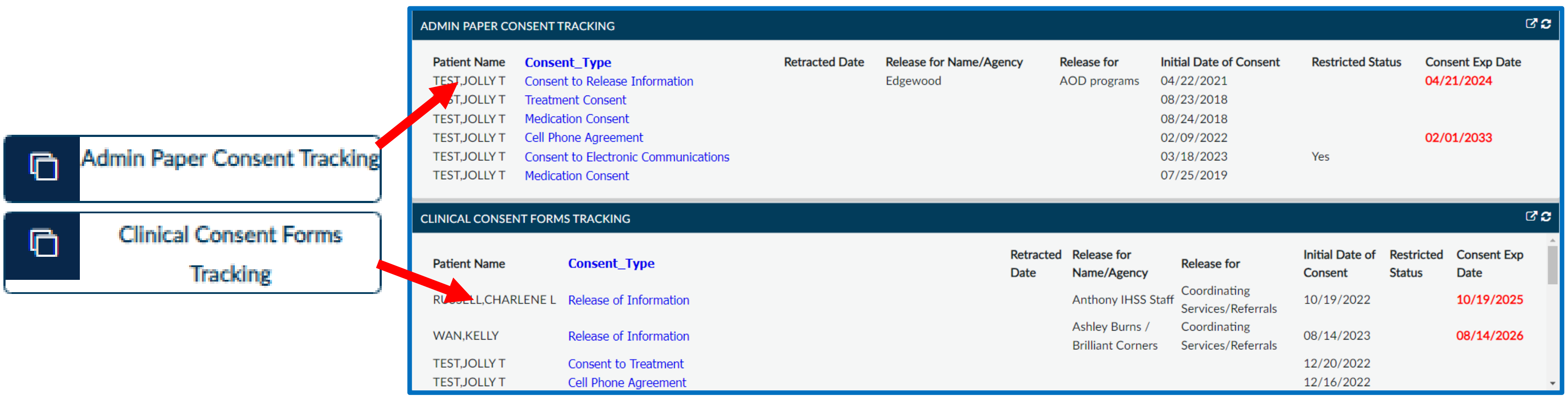
Please note that it is not required for consent forms to be completed via the Clinical Consent forms. PDF versions of the forms may continue to be printed out and scanned into Avatar.

Clinical Consent Forms
Clinical Medication Consent
Clinical Consent Retraction

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.



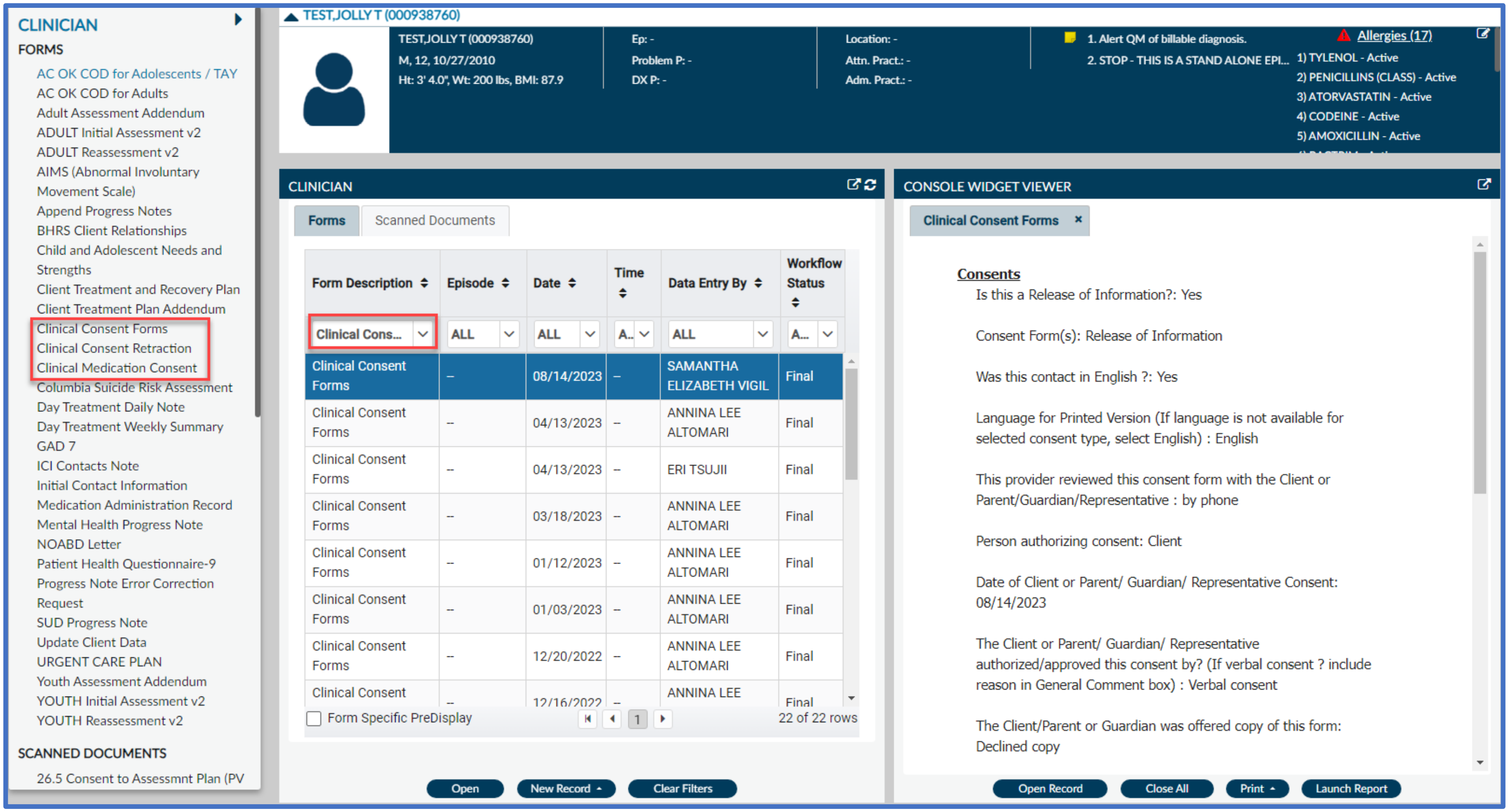
ADMIN PAPER CONSENT TRACKING

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.



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.

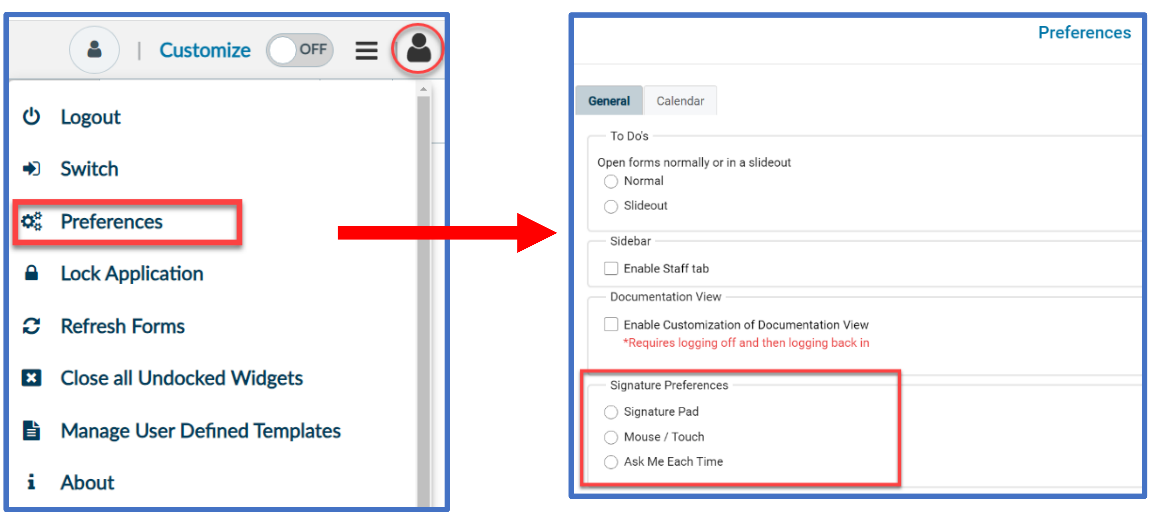
Step 1) Open a **Service Now** ticket in OKTA. Go to "**Request Services**" and then "**Applications & Software**" and then "**Application Access**."

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.



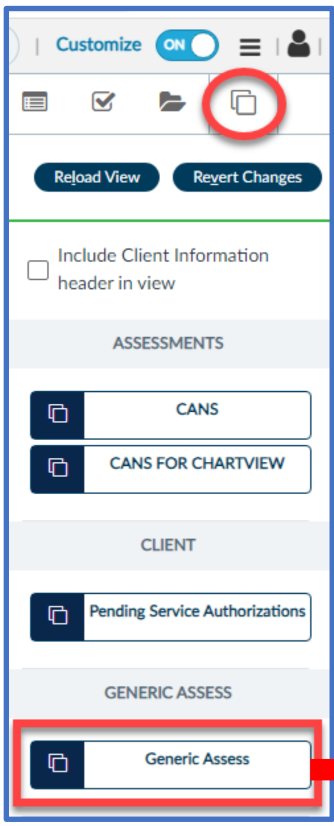
Once you have completed these two steps – the signature pad should work once again!

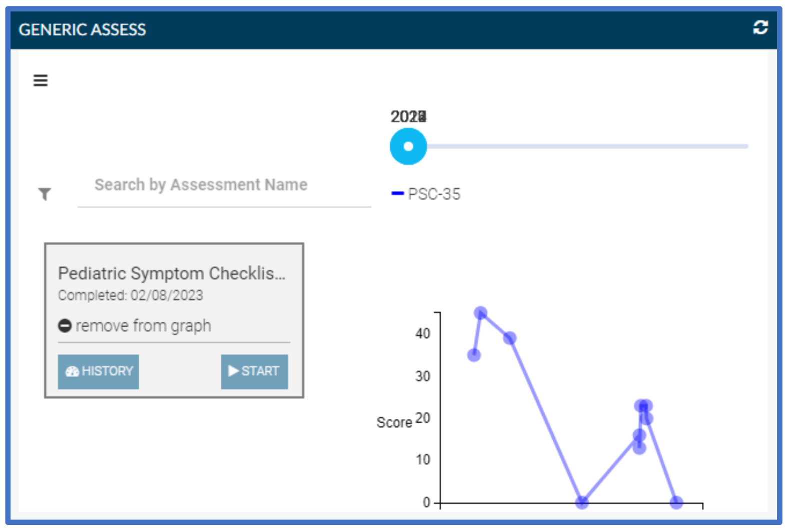
PSC-35

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.

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…

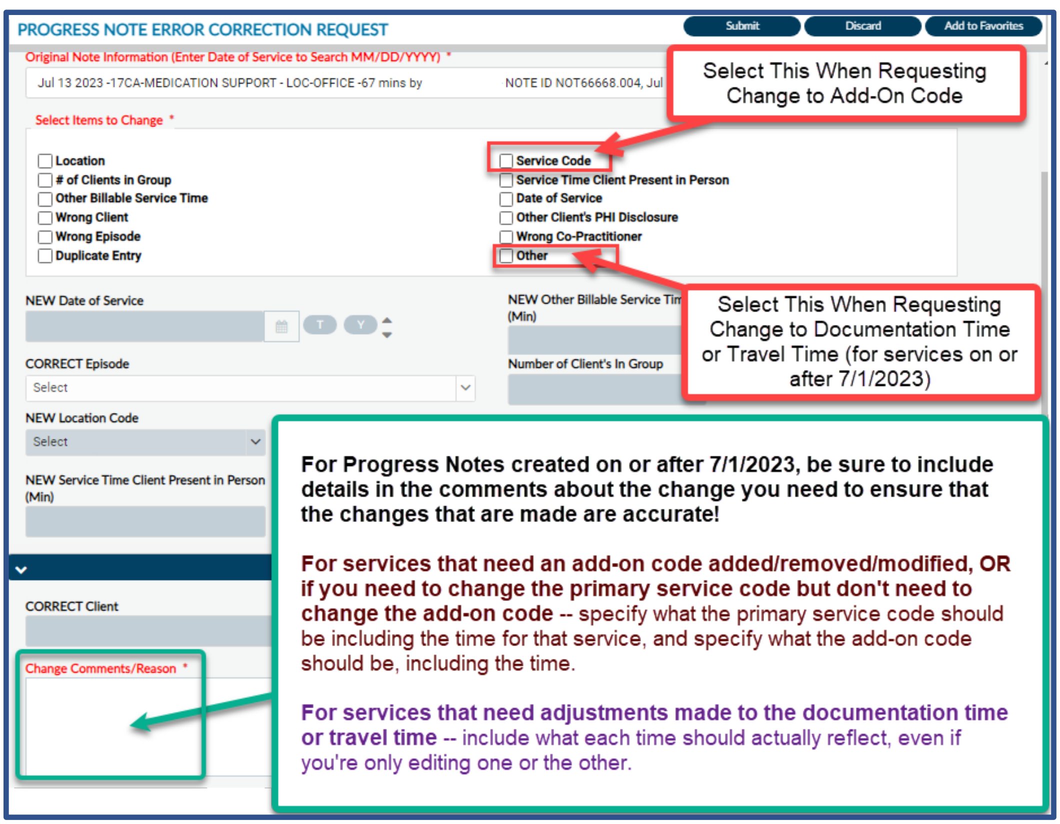
Under Payment Reform, all claims for the same client that are provided under the same service code by the same provider on the same day MUST be combined into **one progress note.**

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.

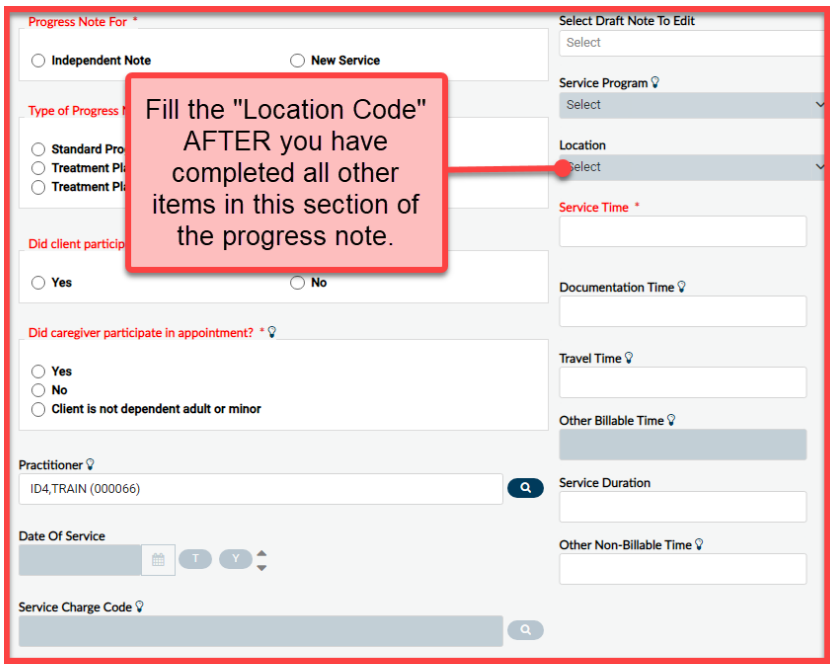


21.Location Code keeps defaulting to OFFICE!

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.

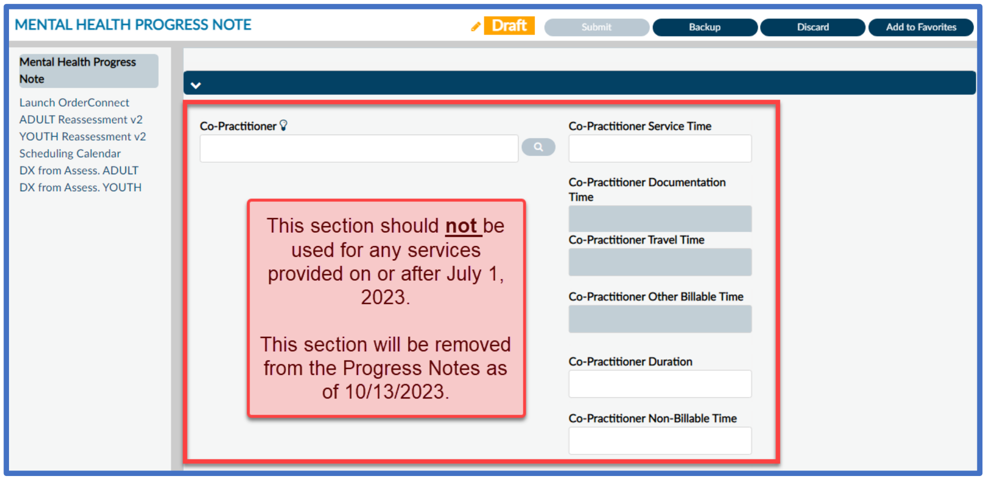


While we continue to work on a fix to this issue, we recommend that you fill out the "Location Code" ***after*** you have filled out all of the other parts of the top section of the progress note.

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.

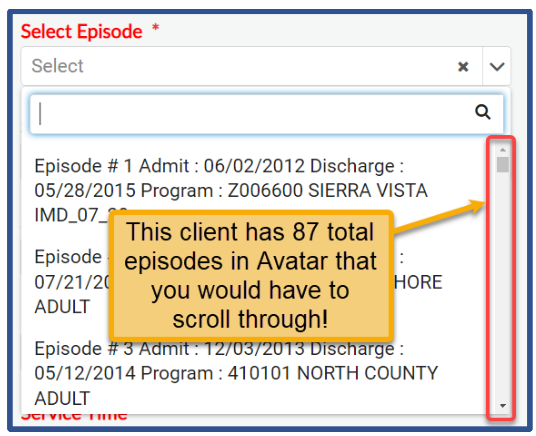
22.Co-Practitioner Section in Progress Note

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.



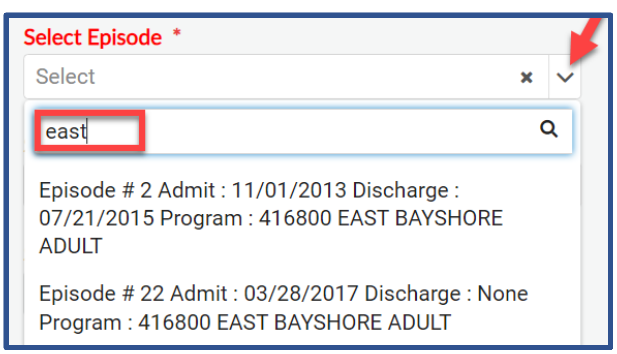
23.Selecting the episode for a progress note without scrolling

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.



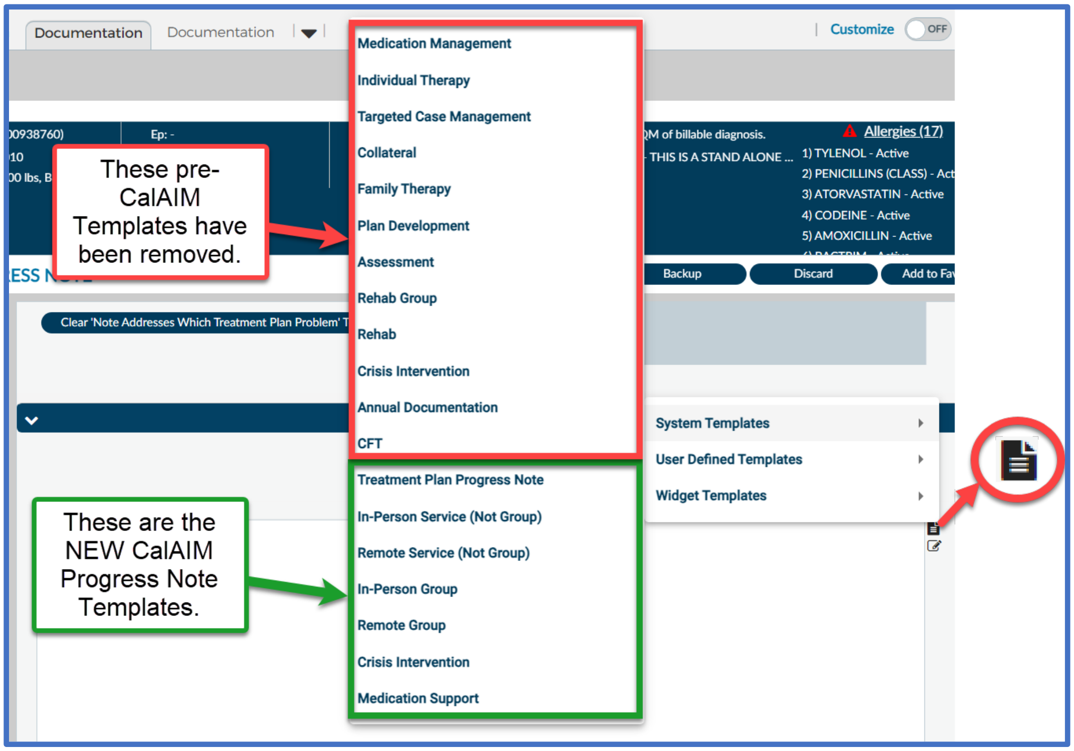
You can reduce the number of items that show in your drop down by typing in a search term in the episode field. Simply click on the down arrow of the “Select Episode” drop down arrow and a text search bar will appear above the drop-down menu items.

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.



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.

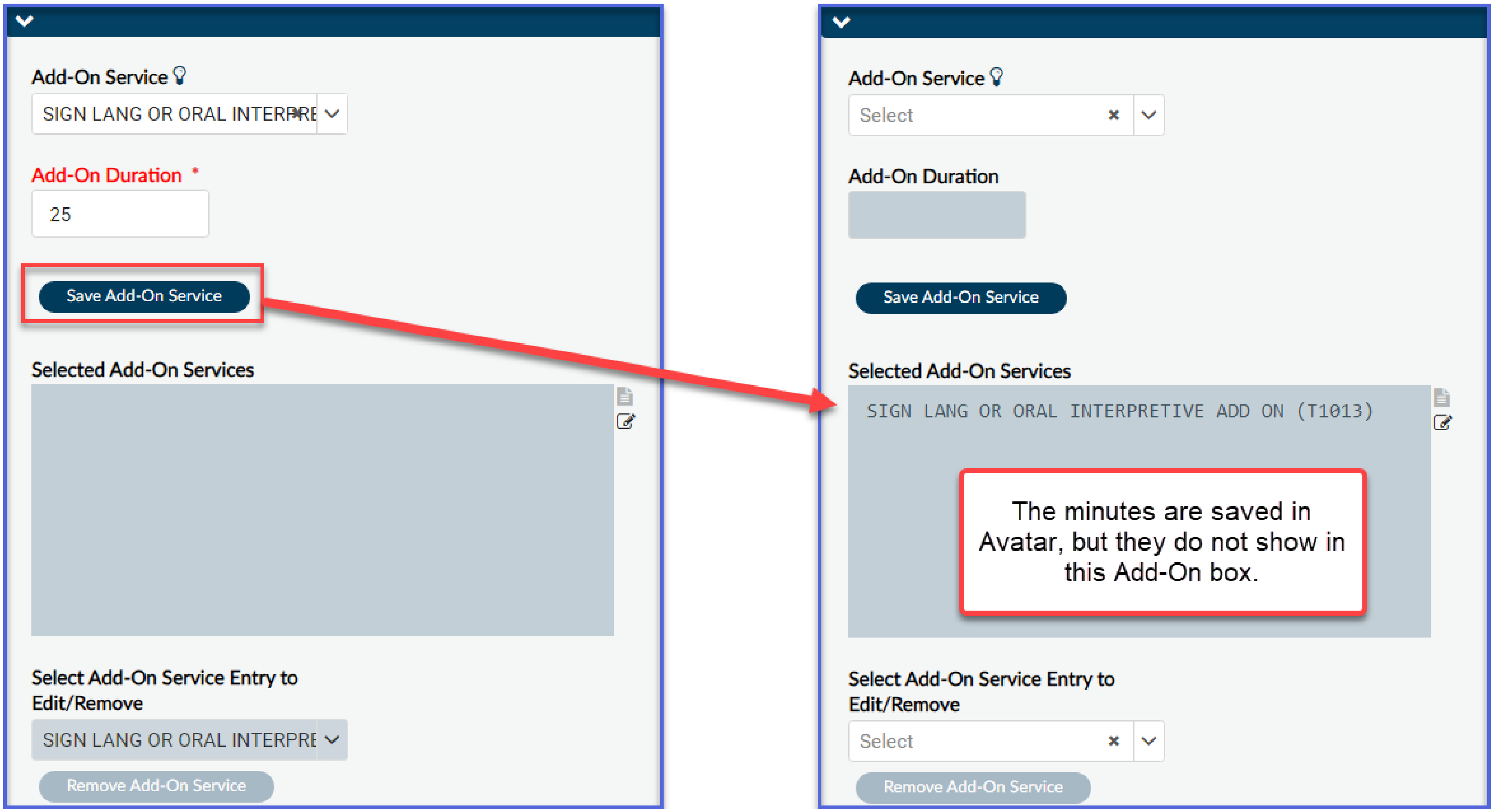
*Note: Contract Agencies, if you have already been implementing the Treatment Plan Progress Note, please feel free to allow your providers to use the Treatment Plan Progress Note templates.

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**."

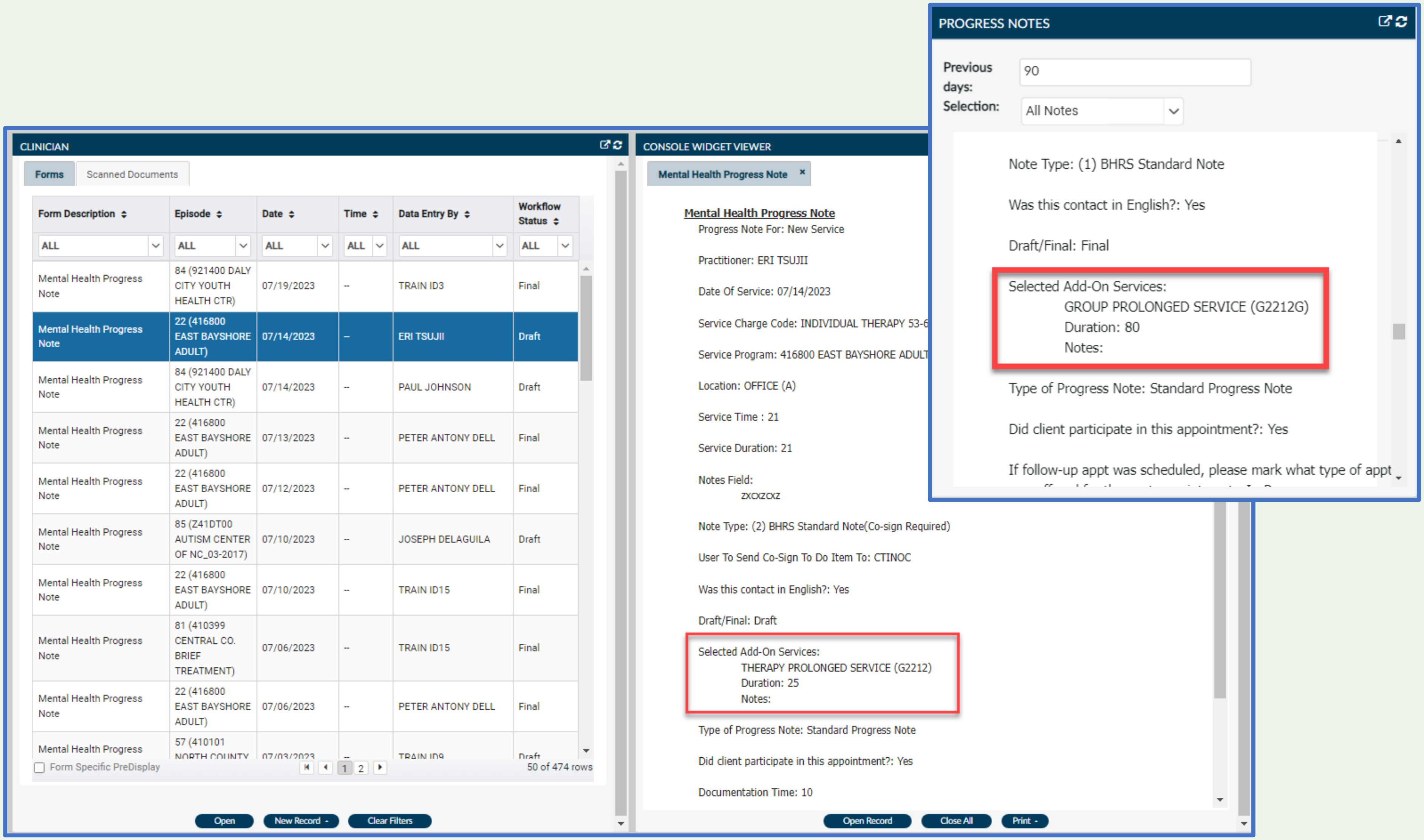
26.Add-On Codes Trouble Shooting

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.



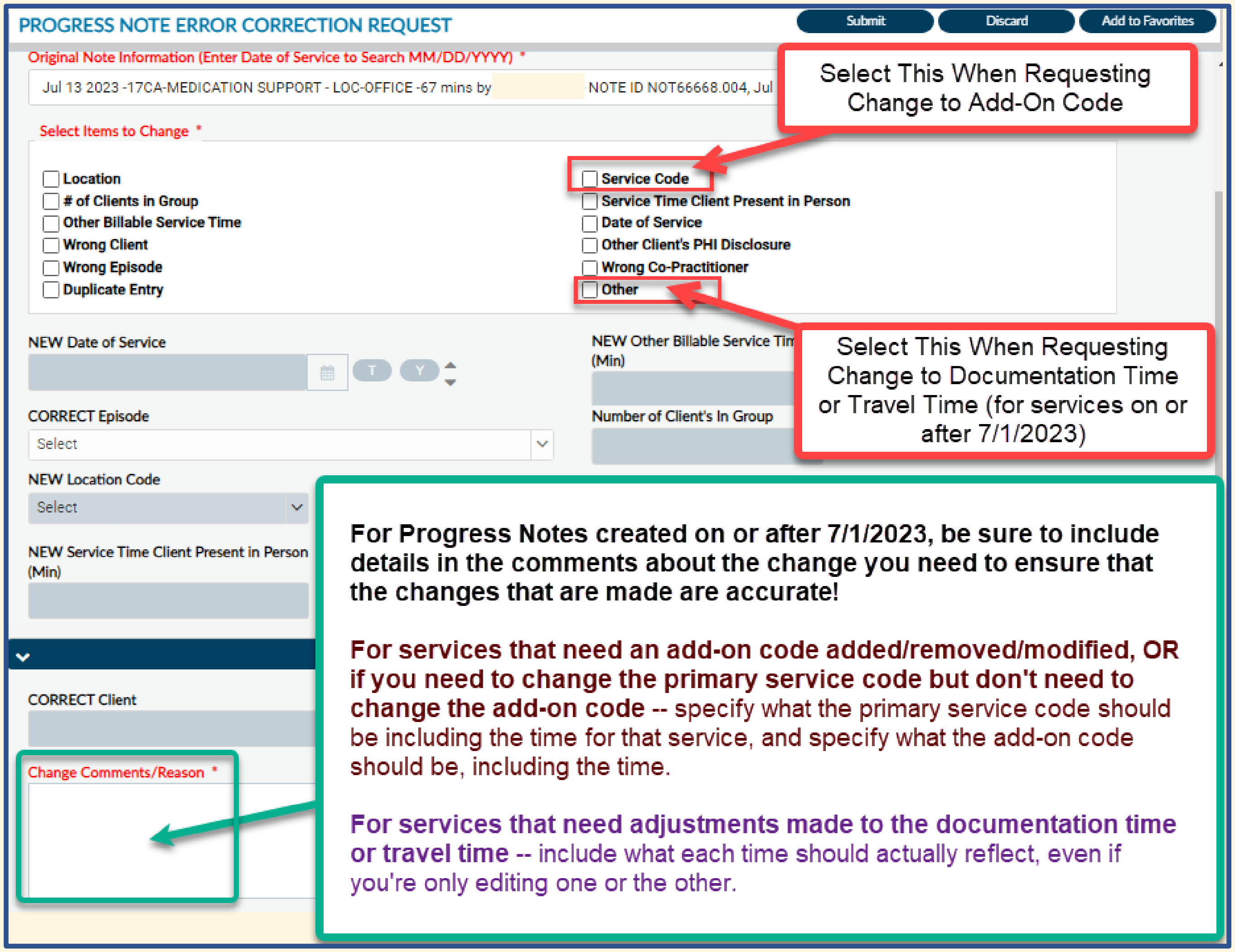
Checking Add-On Codes

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.



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.



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

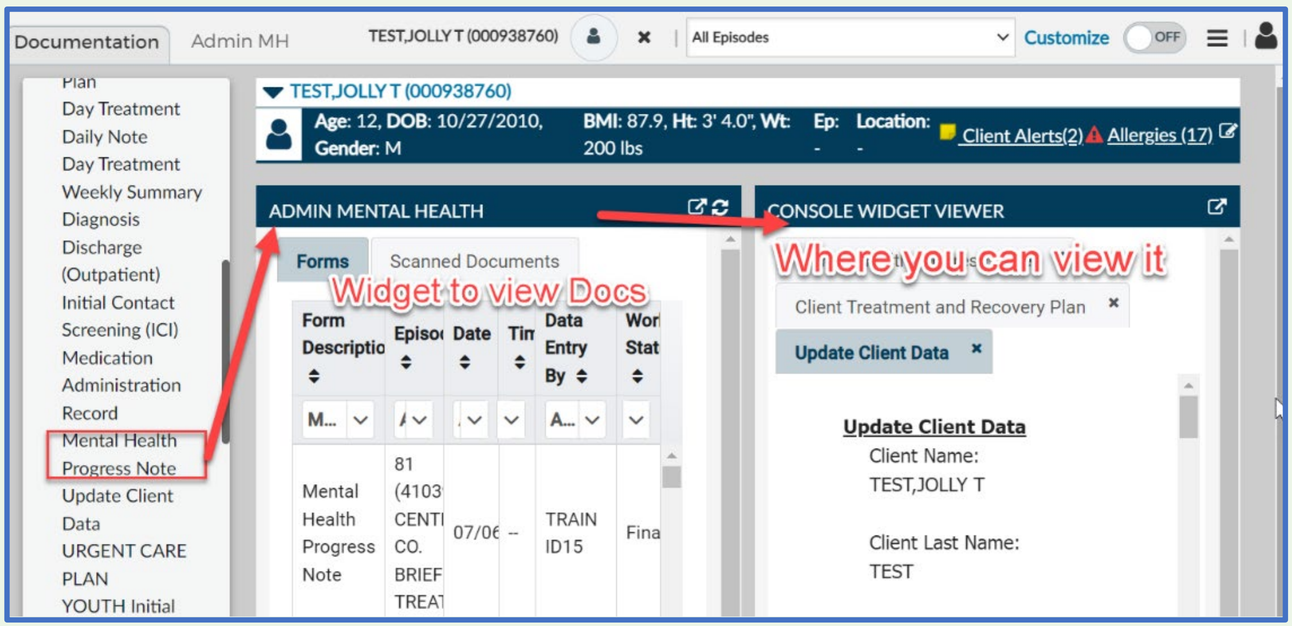
Step 1) Select a client.

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

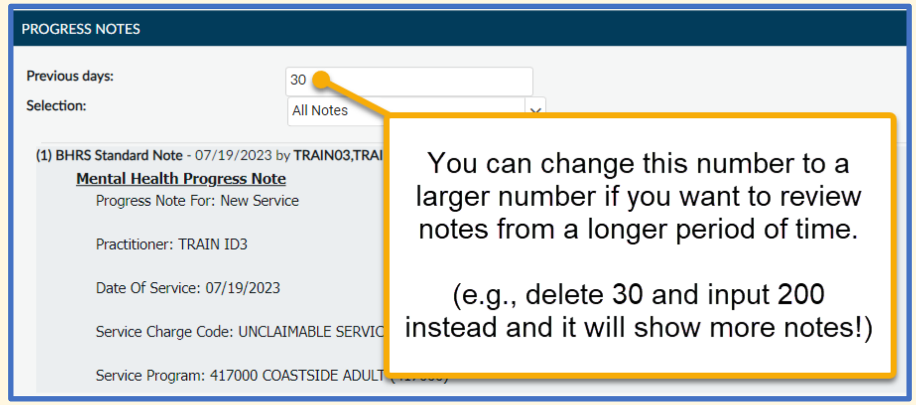
Step 3) You’ll see it pop on the widget screen with a list of the following:

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

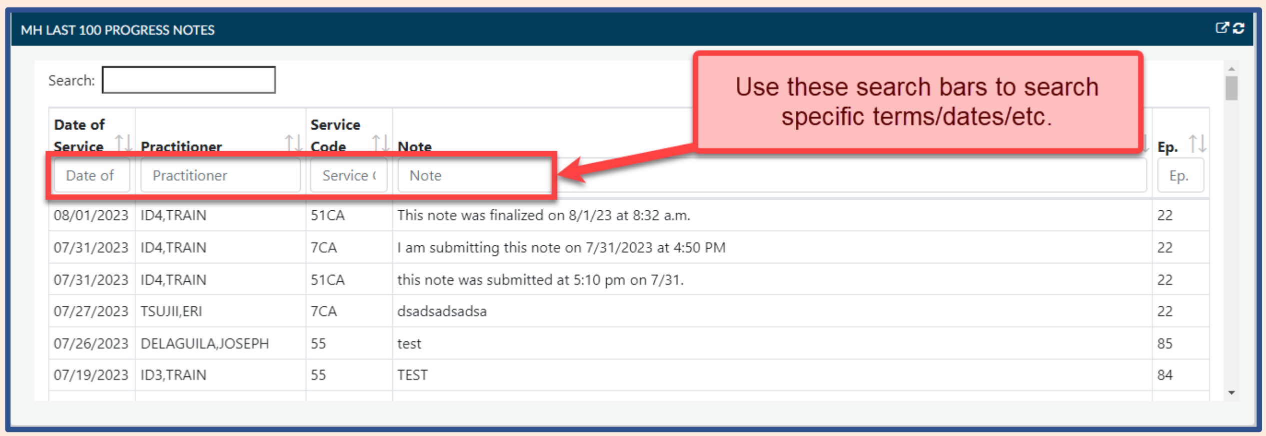
Step 4) You can click on the Progress Note or Form you’d like to look at. It’ll pop up in the widget next to it called “Console Widget Viewer”.



Progress Notes



MH Last 100 Progress Notes



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
Grammatical / Minor Errors in Form	Leave as is.	Leave as is.	Leave as is.	Leave as is.
Forgot to include information.	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.
Included information that should not have been included.	Contact QM.	Contact QM.	Contact QM.	Contact QM.
Put in the wrong date.	Use “Progress Note Error Correction Request” form.	Contact QM.	Contact QM.	Contact QM.
Made error in data entered in progress note (not narrative, but one of the time/service code/etc. fields).	Use “Progress Note Error Correction Request” form.	N/A	N/A	N/A
Submitted a form for something that did not happen (e.g., marked wrong consent form).	Contact QM.	Contact QM.	Contact QM.	Contact QM.
Accidentally created extra draft of a form.	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.
Wrong client.	Contact QM.	Contact QM.	Contact QM.	Contact QM.
Wrong episode.	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

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Section 3

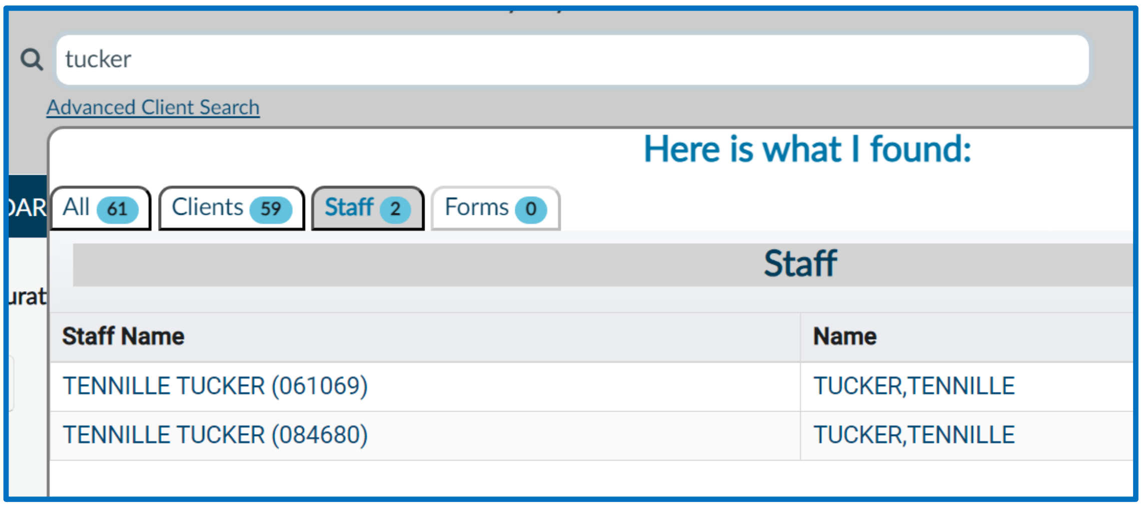
Supervisor - Supervisee Communication

- [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.)

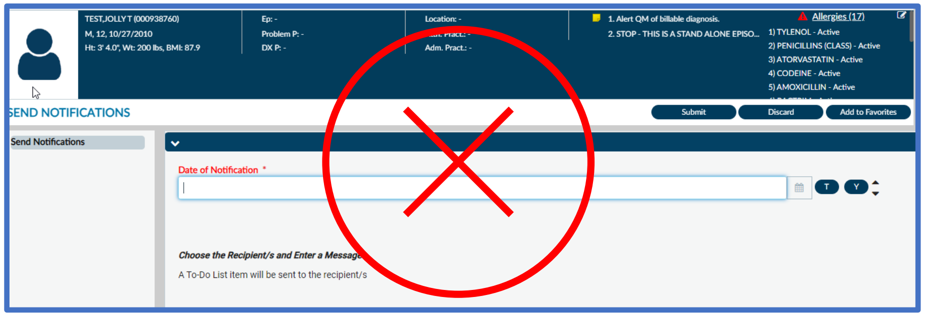
There are some staff who have multiple User IDs in Avatar, which results in their name coming up more than once when staff search for them. This can be for a variety of reasons (staff person works in both SUD and MD, staff was formerly a contracted provider and is now a BHRS employee, etc.)



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) in the BHRS Billing Department (a.k.a. MIS) to ask about which ID should be used.

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.



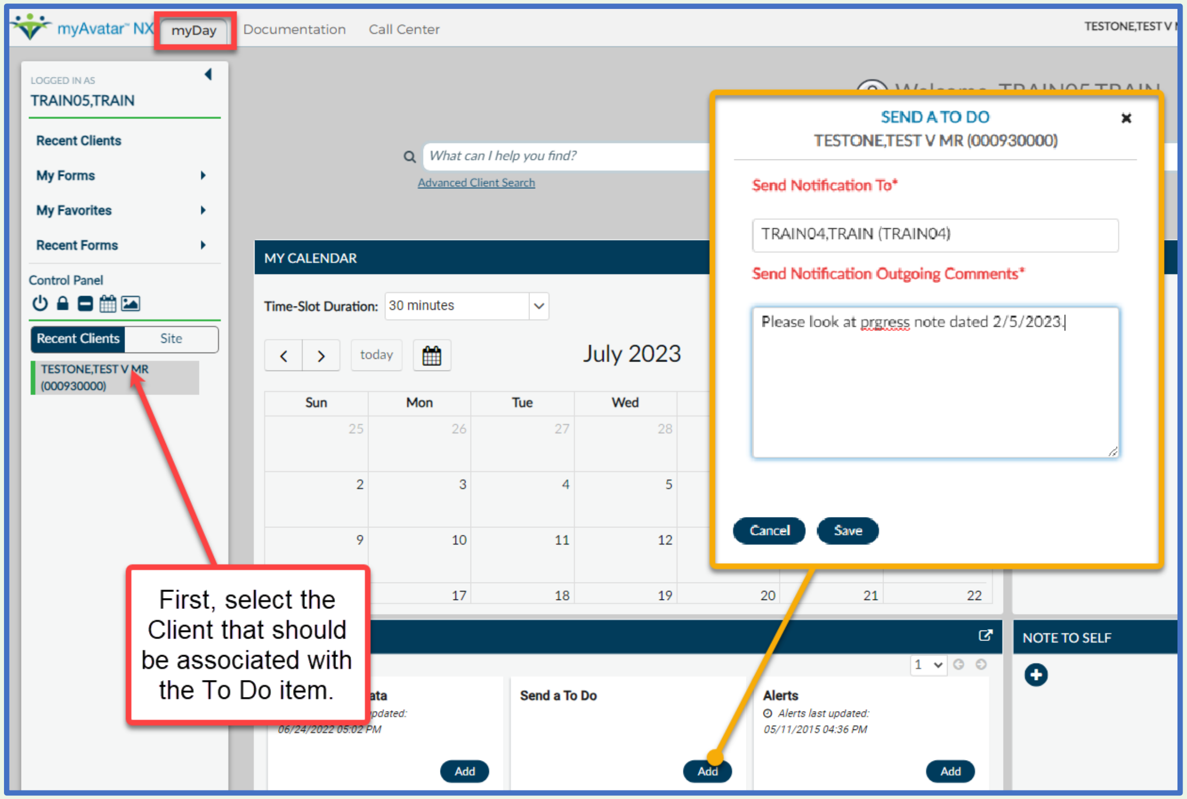
31.How do I send forms to review to my supervisor or other Avatar users now that the Send Notifications form has been retired?

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 “Co-Signature” 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 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.



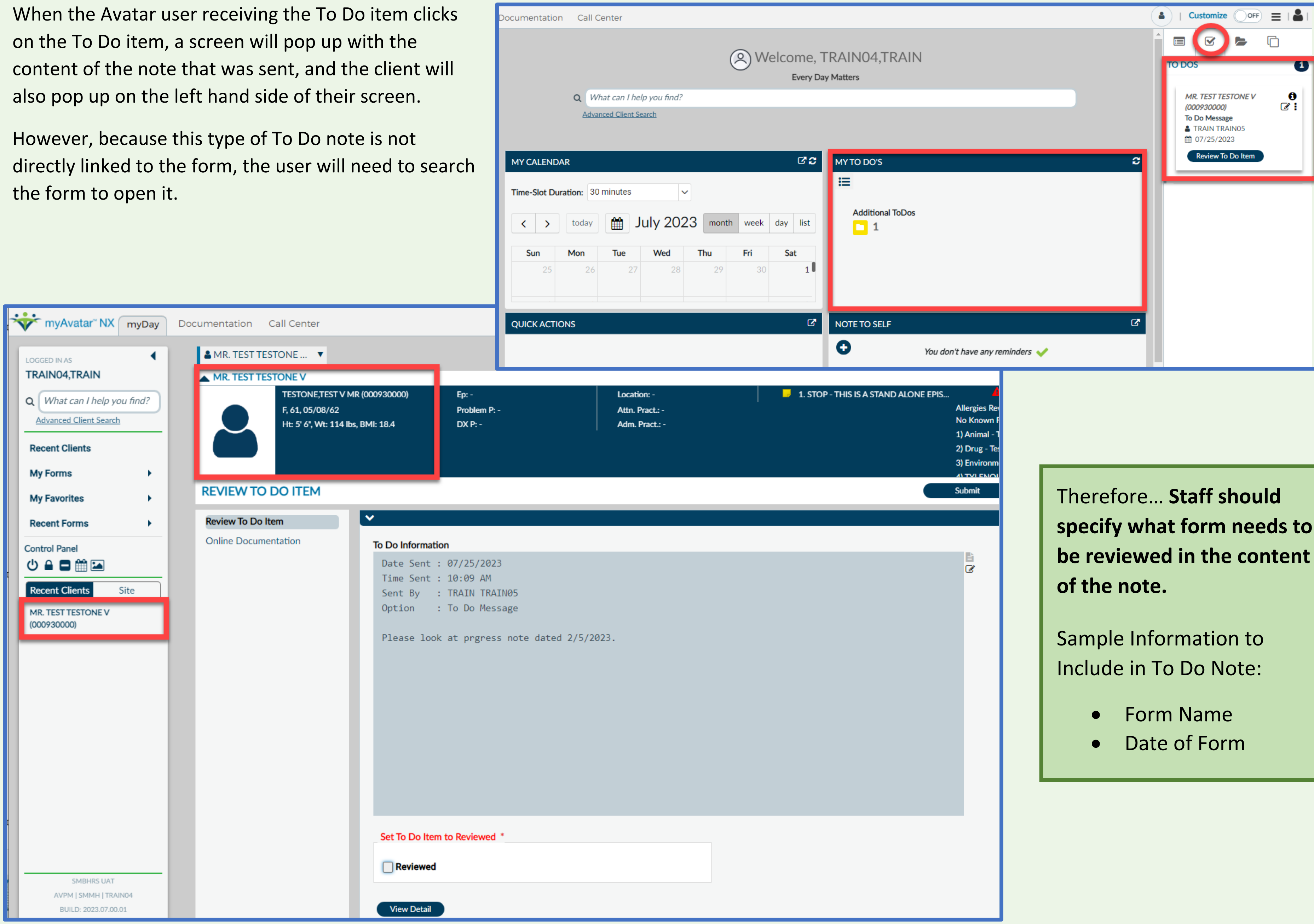
REMINDER

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.**

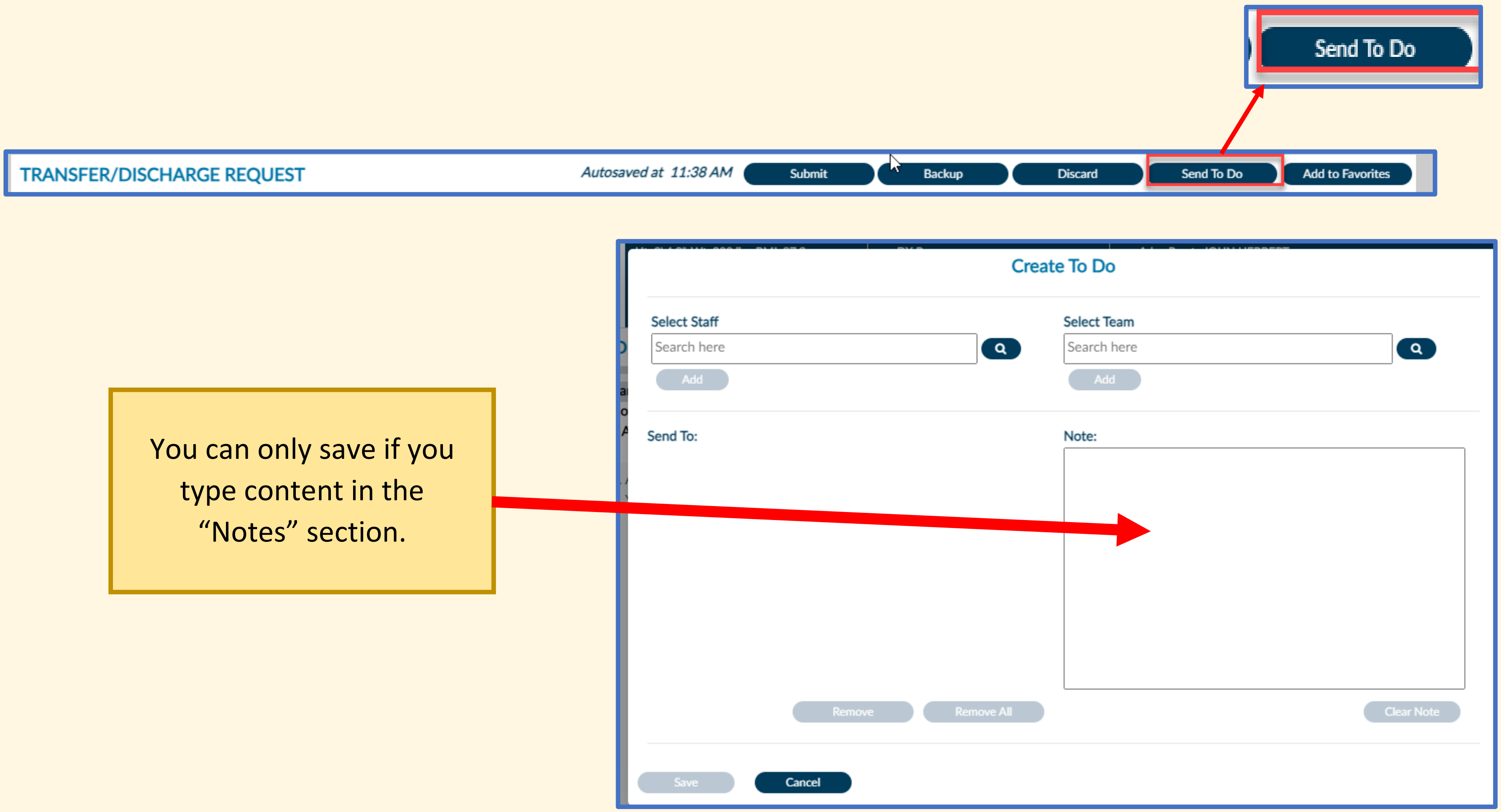
Sample Information to Include in To Do Note:

- 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.



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

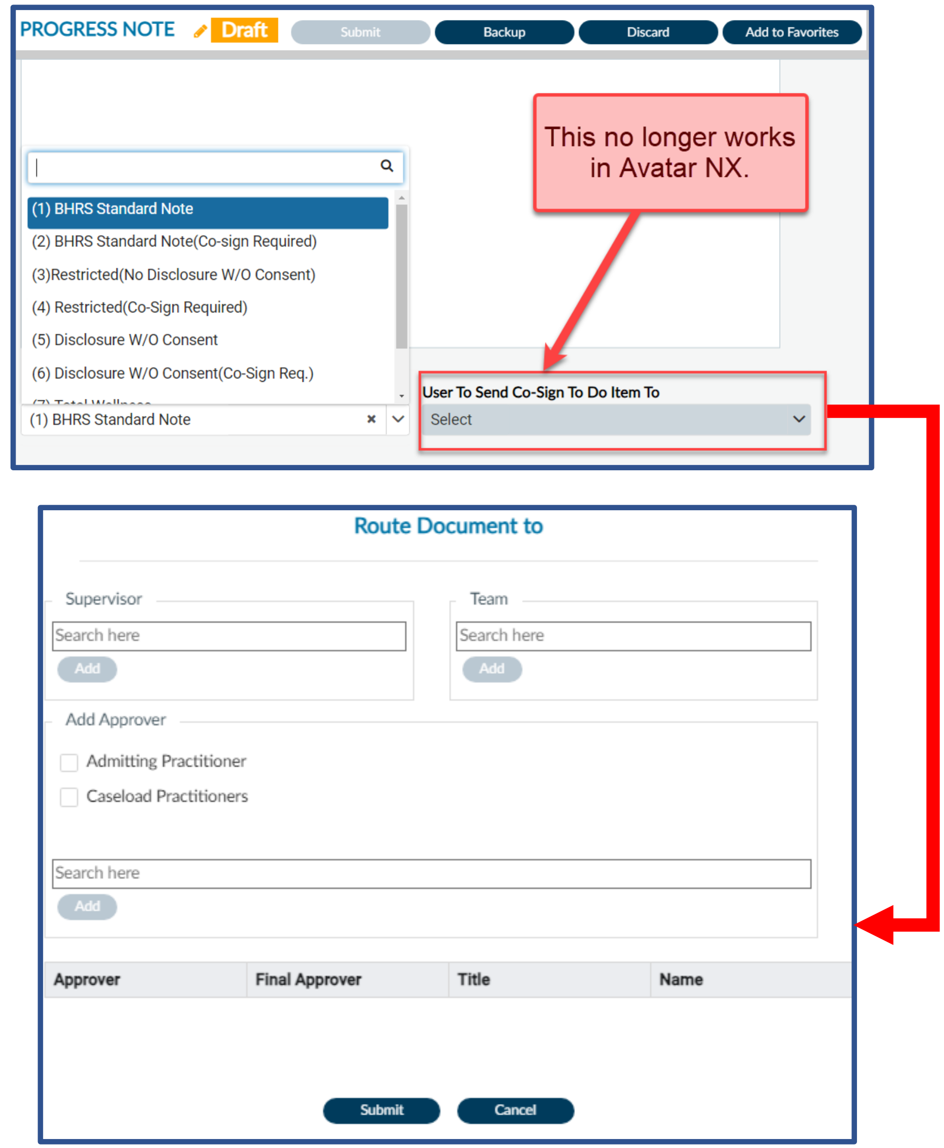
The previous mechanism by which co-signatures were obtained in the old Avatar does not function in Avatar NX. To avoid notes being stuck in limbo and to ensure that staff are able to get the required co-signatures, the Avatar NX mechanism for co-signature was turned on.

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 <u>all progress notes</u> that get finalized, <u>regardless of if the note requires a co-signature.</u>** IT is unable to limit this pop up to show only for notes that require co-signature.

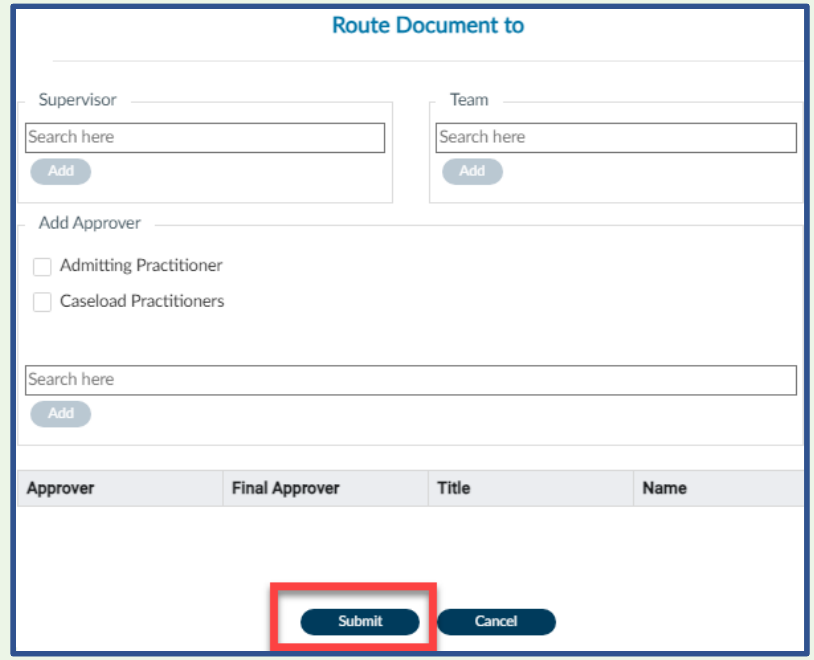
	For Staff Who Do NOT require co-signature	For Staff Who Require Co-Signature **(Option 1)**	For Staff Who Require Co-Signature **(Option 2)**
For which Staff does this option apply?	All staff, regardless of whether or not co-signature is actually required. (Licensed staff will see this, too).	Some accounts in Avatar are set to require a co-signature. These staff will see the "Supervisor" text as required (red font).	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. 2) Some staff will see the "Add Approver" text as required (red font). Use this option if the Add Approver is required.
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.

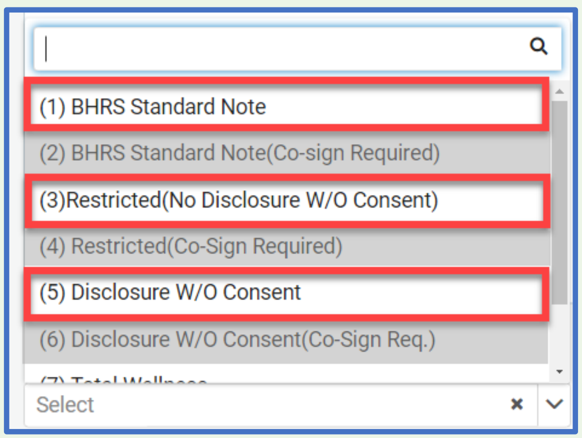
*Required fields will be in red font.

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.



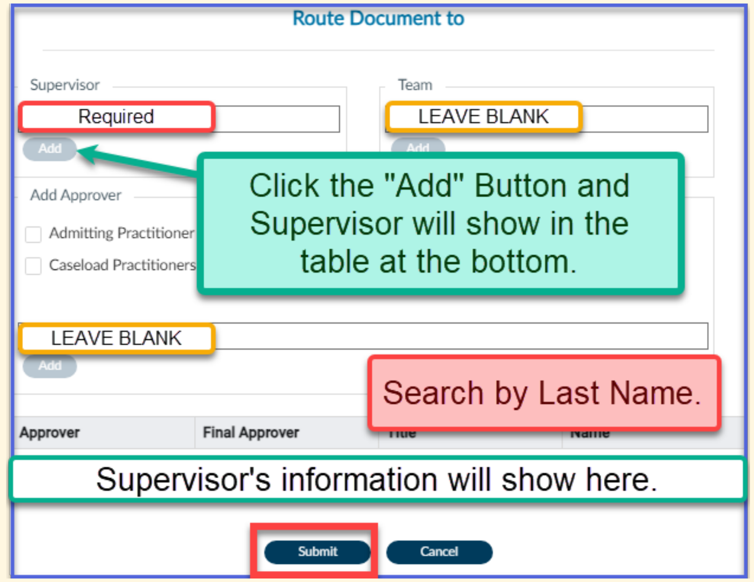
IT has checked with the Avatar vendor to see if this pop up can be removed. However, we were informed that this is not something that can currently be removed.

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.

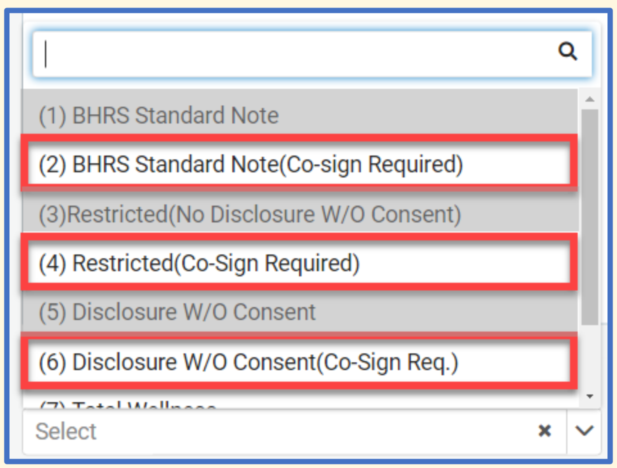


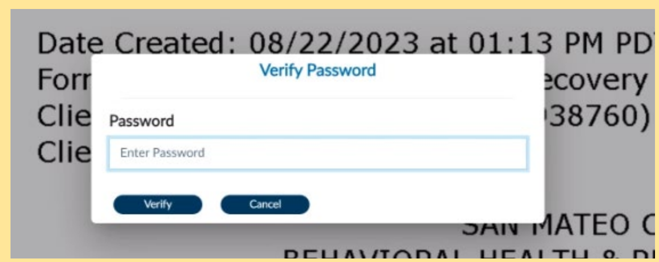
When a staff person does require co-signer then the approver field will be marked as required (shown in red font).

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.

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.



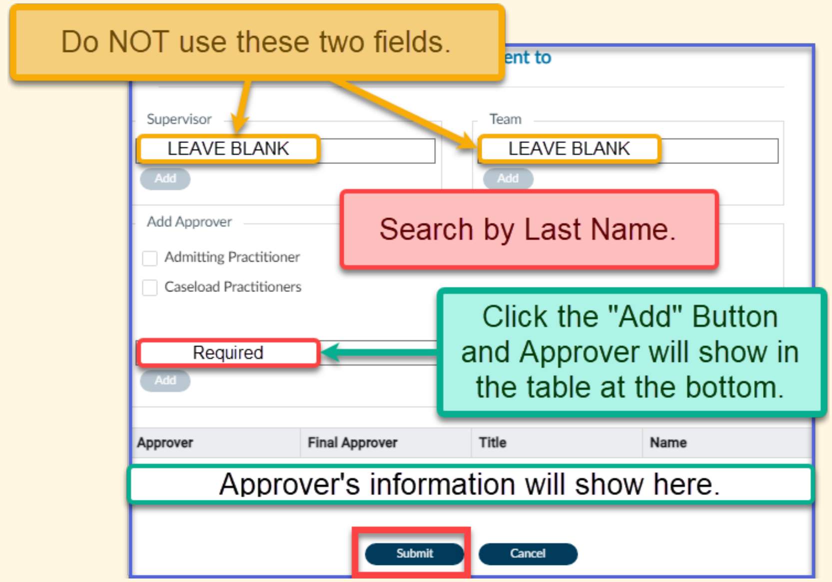


Note for Approvers: Another change from the old Avatar is that with Avatar NX the approver needs to enter their Avatar password to complete the approval process. Currently, this is not a feature that QM or IT are able to disable, but IT is working with the Avatar vendor to find a solution. For more information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

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

Follow the instructions on this page if…

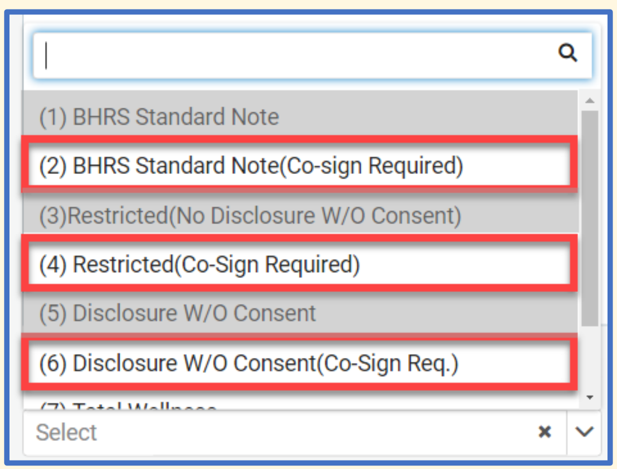
1) If nothing is marked as required, but supervisor is requiring co-signature (e.g., if supervisor wants to review new staff's notes for a period of time), OR
2) The "**Add Approver**" text in the center of the window is in red font.

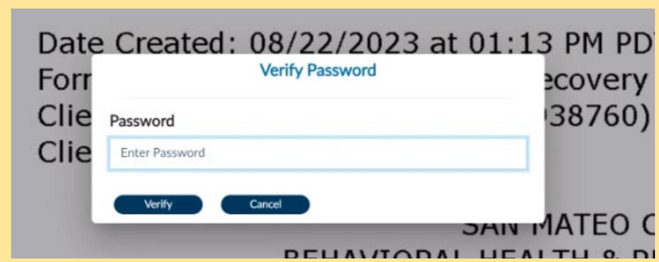


Alternatively, on some forms there is a "Pending Approval" option that is active for some users. By selecting "Pending Approval" you will trigger the Document Routing window to pop up, and you will enter your supervisor name in the "Add Approver" field and click "add" to send to your supervisor.

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.

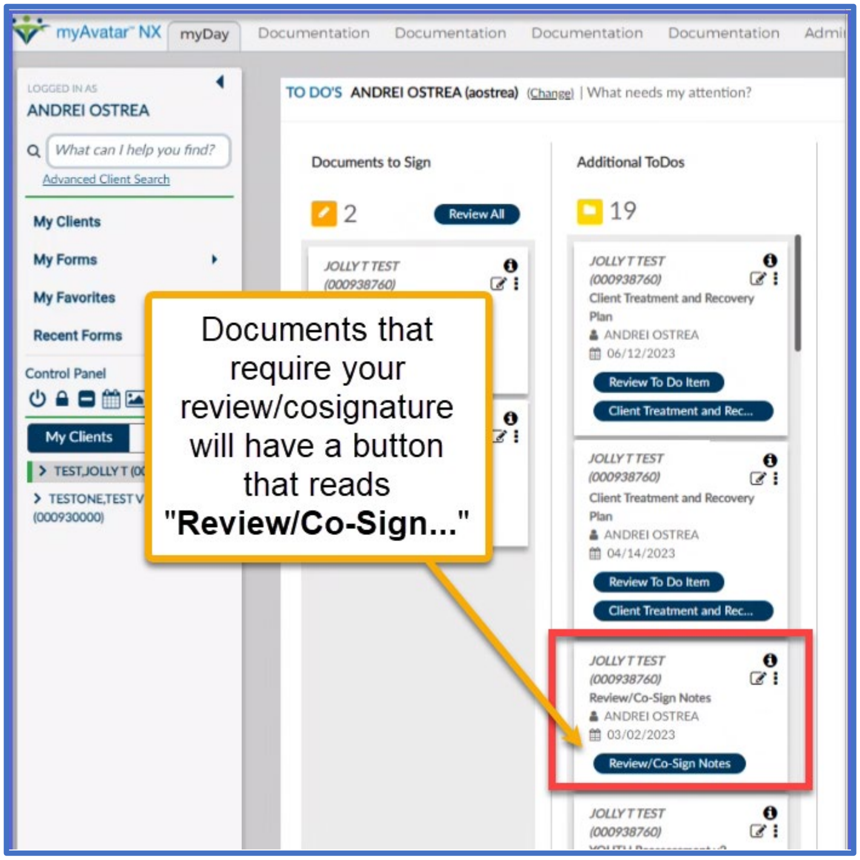




Note for Approvers: Another change from the old Avatar is that with Avatar NX the approver needs to enter their Avatar password to complete the approval process. Currently, this is not a feature that QM or IT are able to disable, but IT is working with the Avatar vendor to find a solution. For more information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

32.Where do supervisor’s 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. One 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

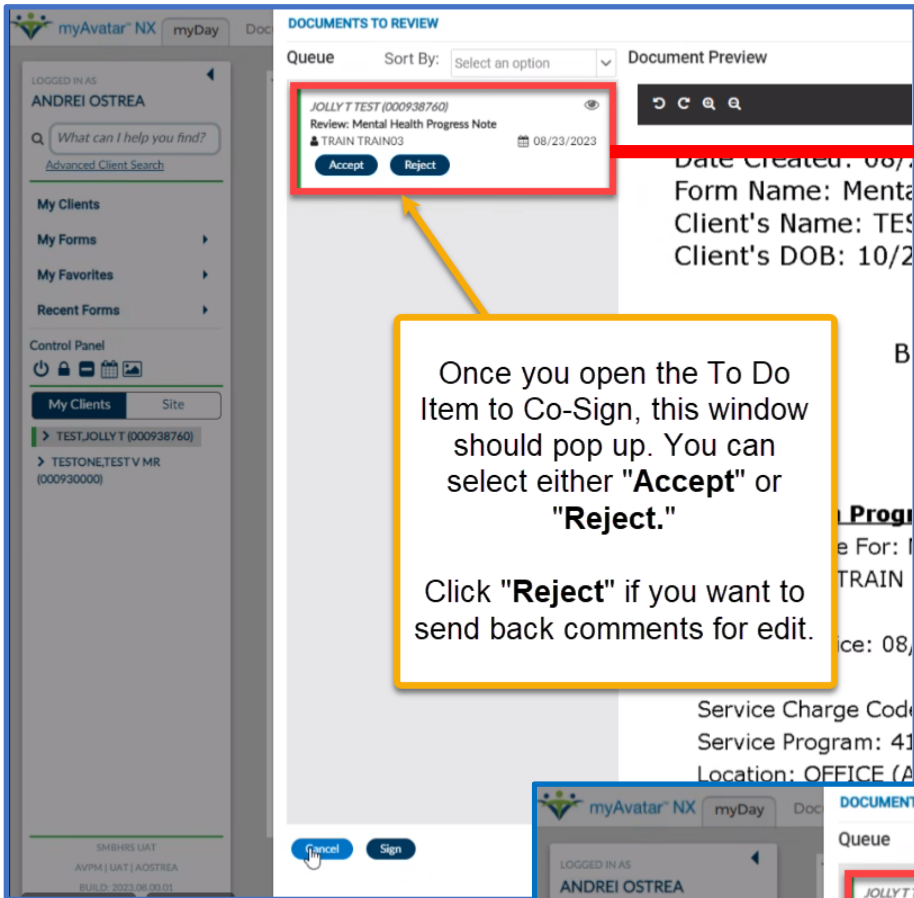
If the supervisor does not see the To Do Item, this could be for several reasons:

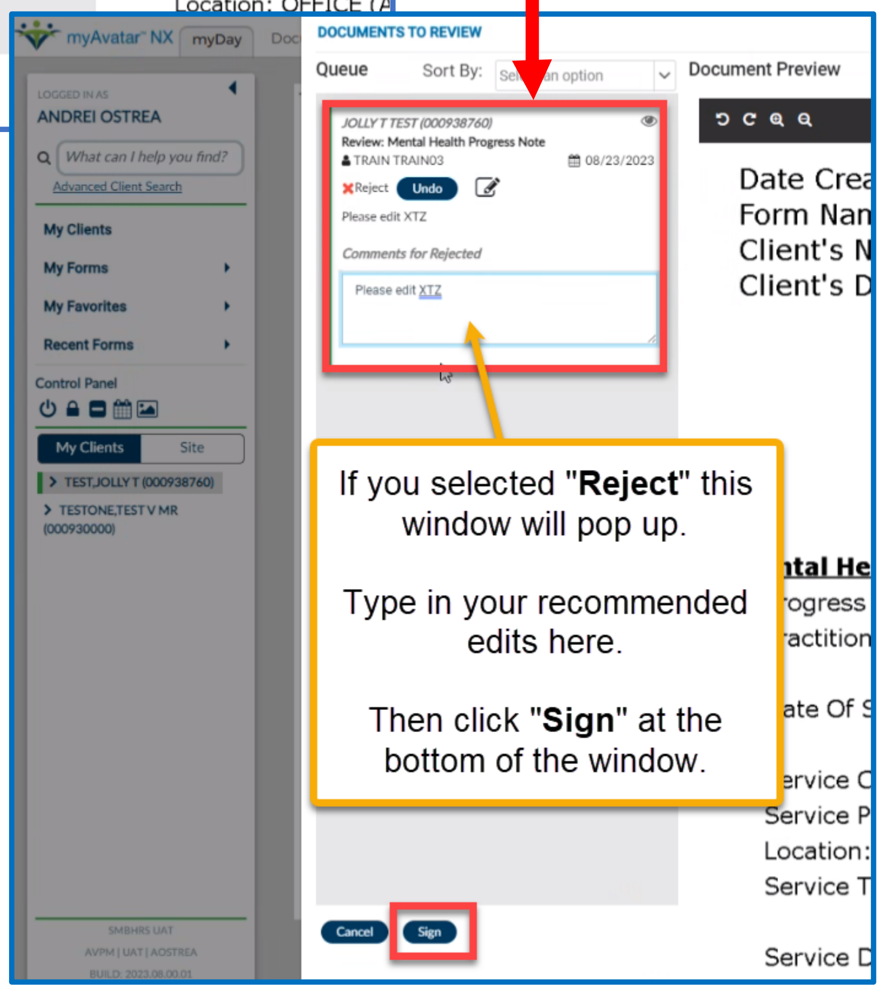
1) The supervisor has multiple user accounts associated with their name and the inactive/incorrect account was selected. Double check with the supervisor which account should be selected when sending To Dos.

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.

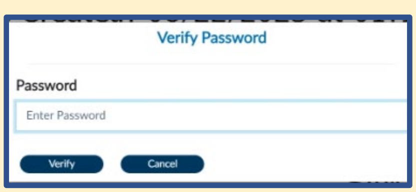
   Accounts may be deactivated for a variety of reasons including, but not limited to: too many failed attempts to log in, not having used Avatar for an extended period of time (e.g., staff was on leave), etc.

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



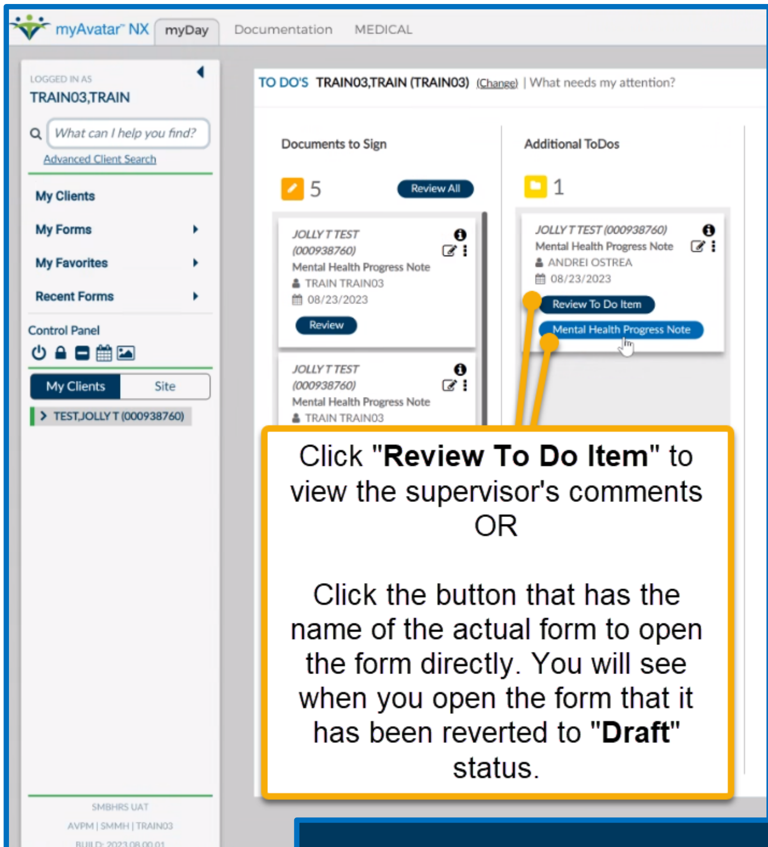


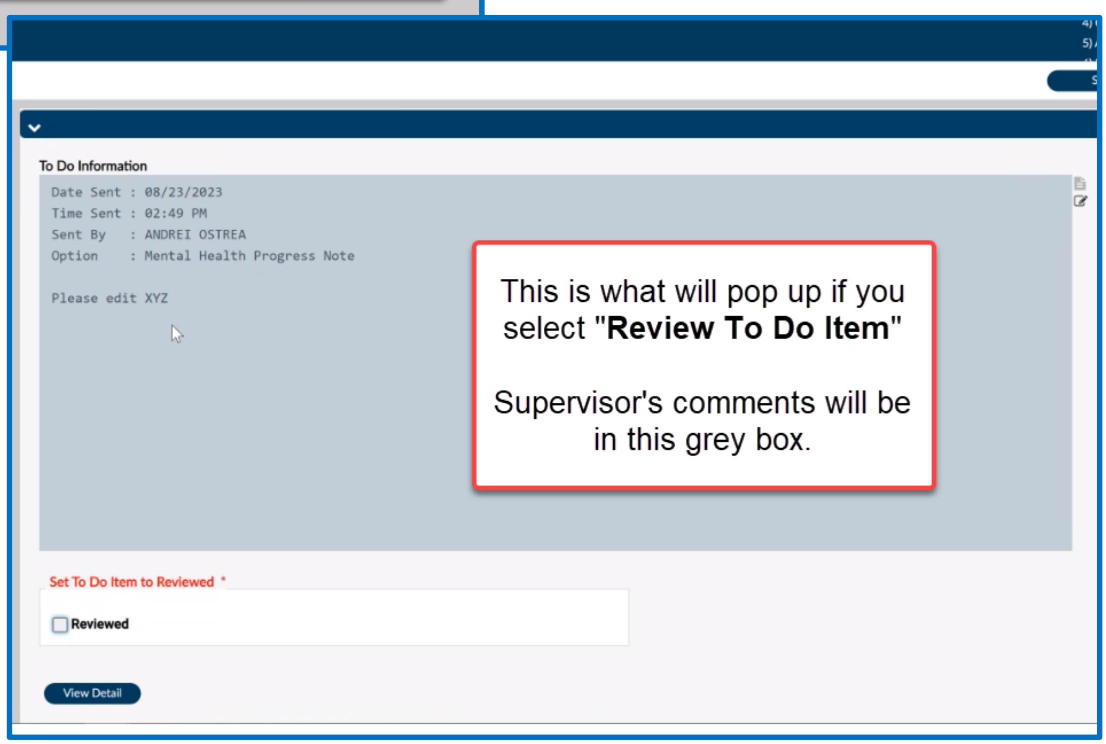
Note for Approvers: Another change from the old Avatar is that with Avatar NX the approver needs to enter their Avatar password to complete the approval process. Currently, this is not a feature that QM or IT are able to disable, but IT is working with the Avatar vendor to find a solution.



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.





Section 5

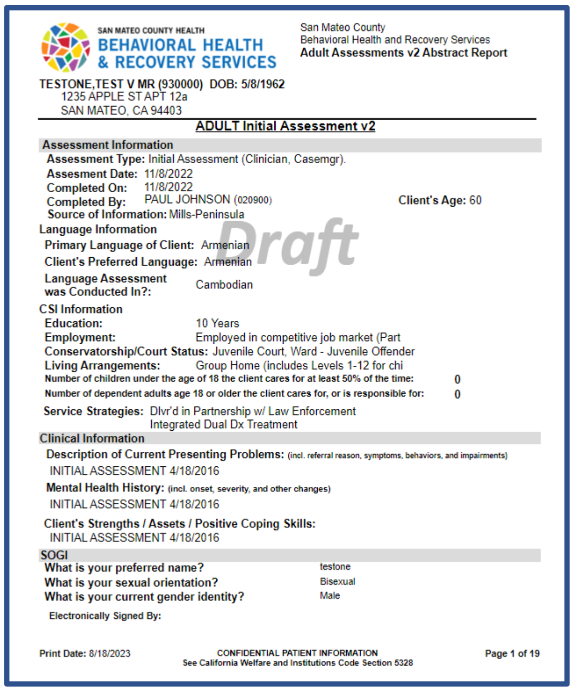
Printing and Scanning

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	This is limited to sending a To Do notification to one Avatar user. Cannot send to multiple Avatar users. Does not link directly to a form.	If this button is embedded in the form, you are able to send To Dos to multiple users. Links directly to the form.	For use when co-signature is required. Links directly to the form. See "Co-Signature" section for more information on Document Routing.

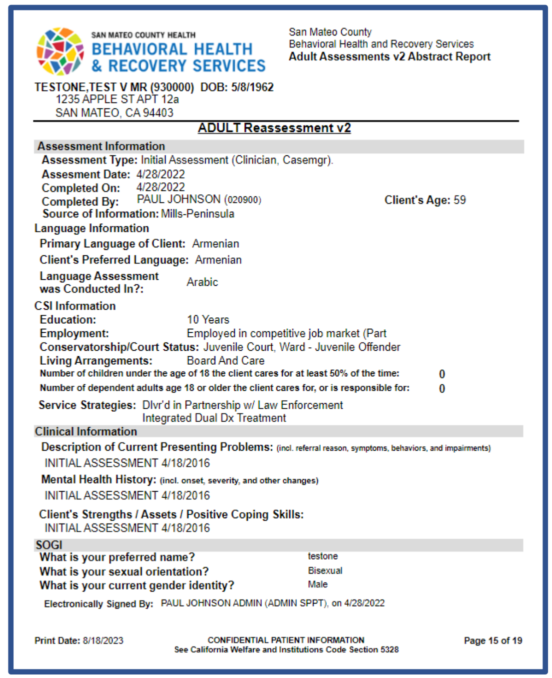

SAN MATEO COUNTY HEALTH
BEHAVIORAL HEALTH & RECOVERY SERVICES
San Mateo County
Behavioral Health and Recovery Services
Adult Assessments v2 Abstract Report

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

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
Draft
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: Dlvr'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

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: Dlvr'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

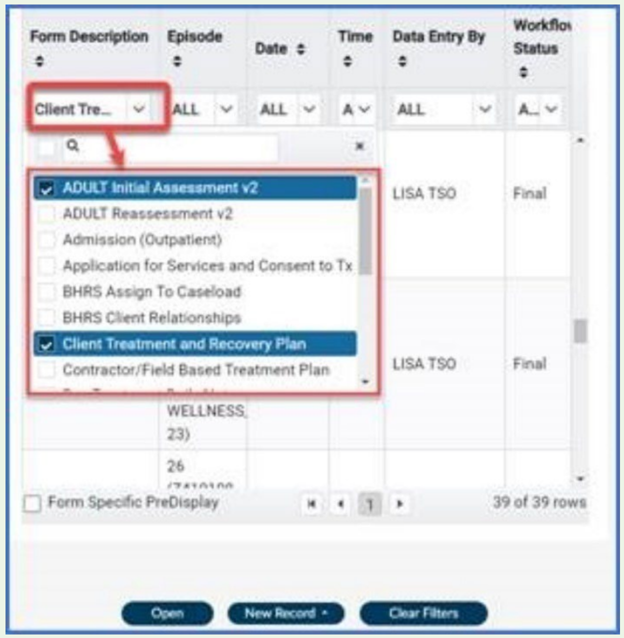
Printing Individual Forms

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.

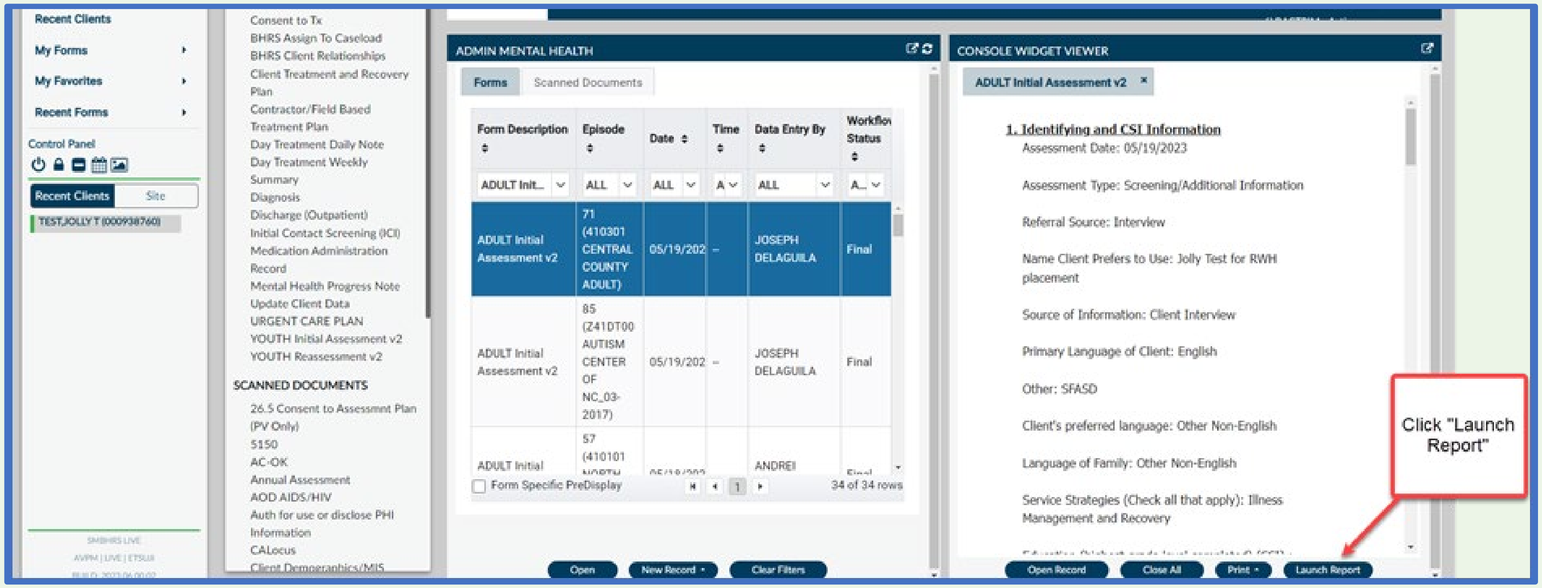
*To print formatted versions of an individual progress note, please use the "Progress Notes Report" and select the date of the note you wish to print when generating the report. Instructions on how to print using Avatar reports are included in the next question.

Step 1) Select a client.

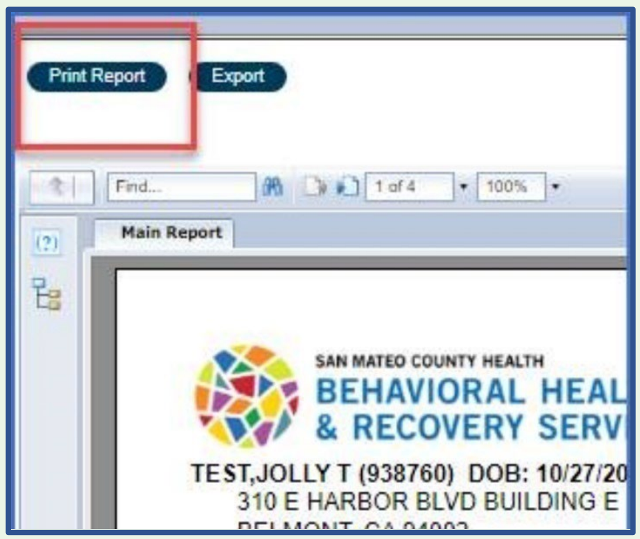
Step 2) Click on the **Documentation** Tab. You should see the Forms widget and a Console Widget viewer. Click on the drop down menu from the "Form Description" column of the forms widget and select the type of forms you're looking for.



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:

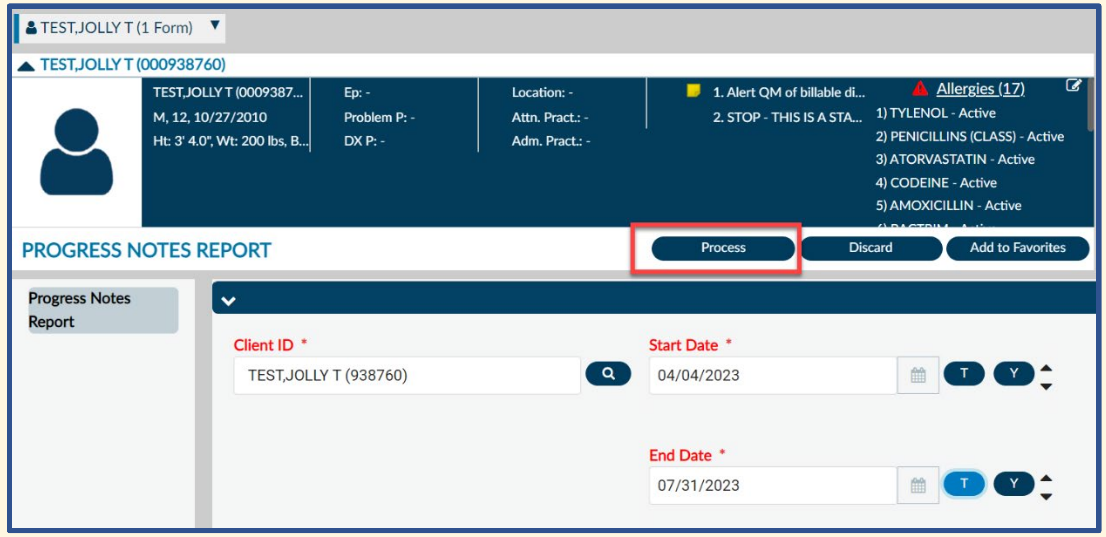
All 4 | Clients 0 | Staff 0 | Forms 4

Forms

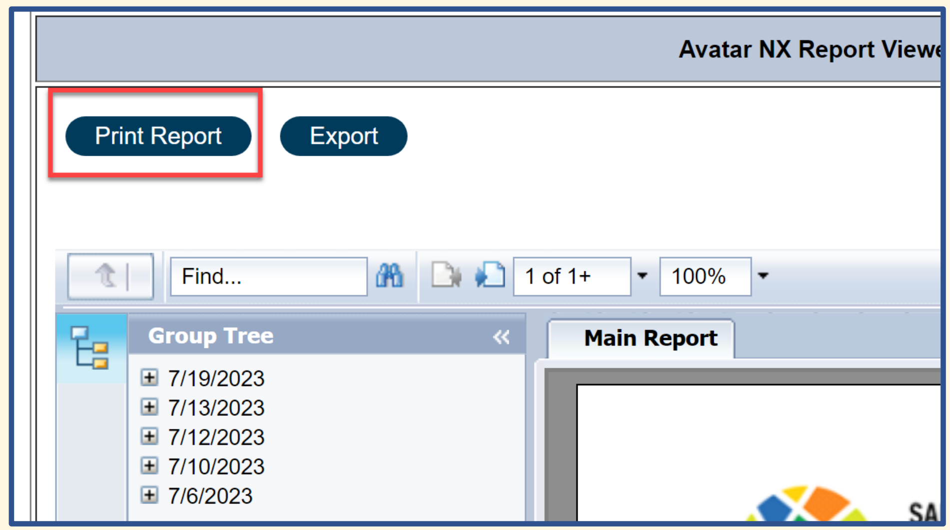
Undock	Name	Menu Option
	Client Treatment Plan V2	/ Avatar PM / Reports
	Client Treatment and Recovery Plan	/ Avatar CWS / Treatment Planning
	Client Treatment Plan Addendum	/ Avatar CWS / Treatment Planning
	BHRS Client Treatment and Recovery Plan	/ Avatar CWS / CWS Utilities / Treatment Plan Maintenance

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.



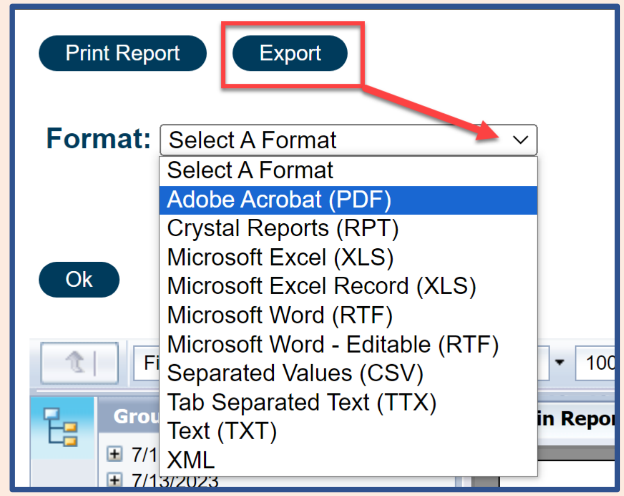
Select "Print Report" at the top left corner of the pop up window to print the report.

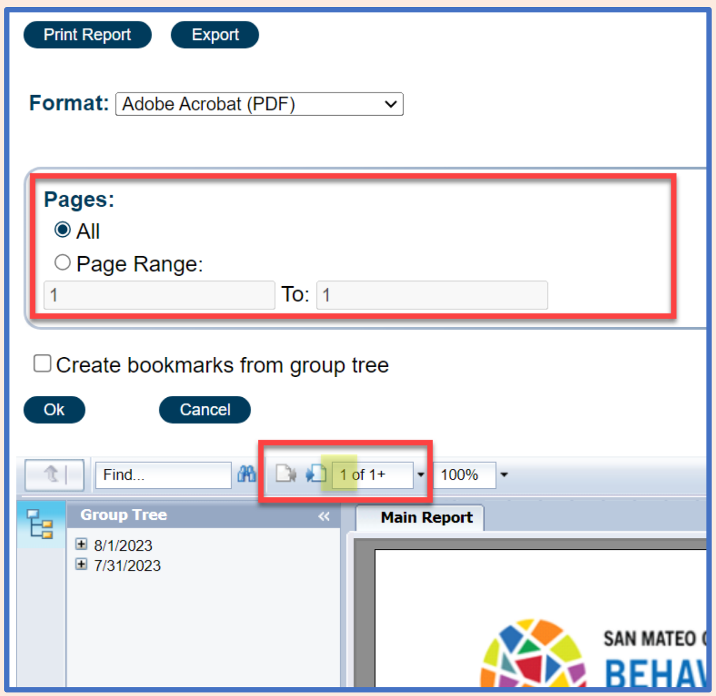


Return to Table of Contents

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.

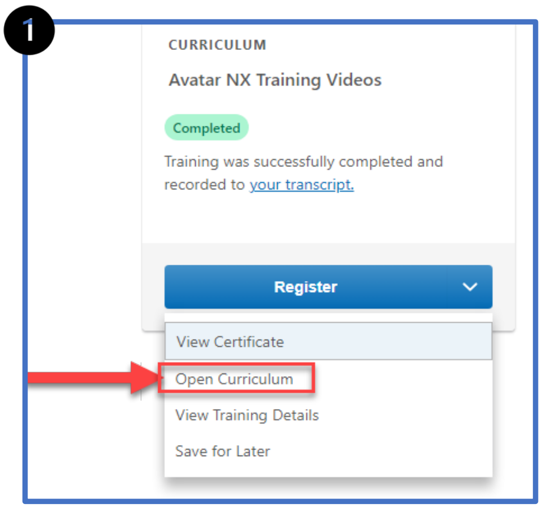
Section 6

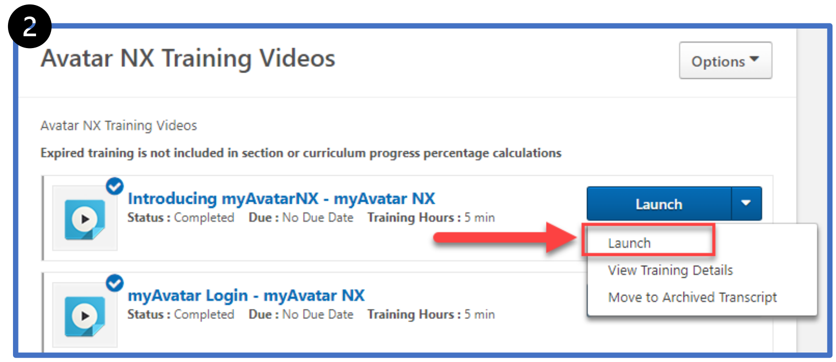
Avatar NX Resources

- Avatar NX Videos
- Need More Help with Avatar NX?
- BHRS Resources (Avatar NX and CalAIM)

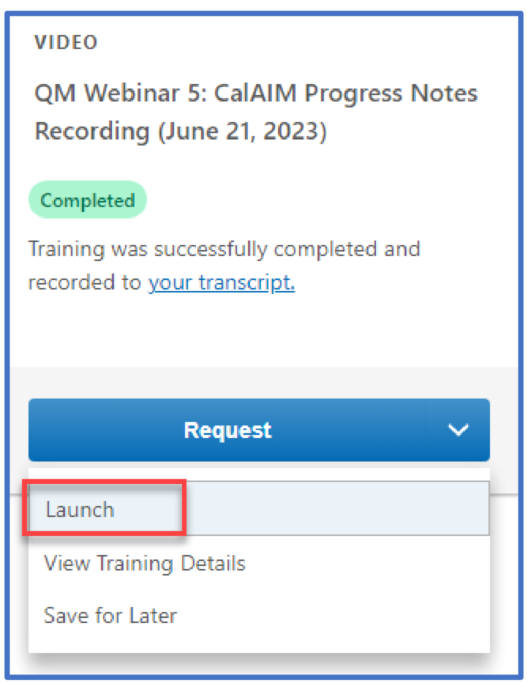
37. Re-watching the Avatar NX Videos I already completed

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.



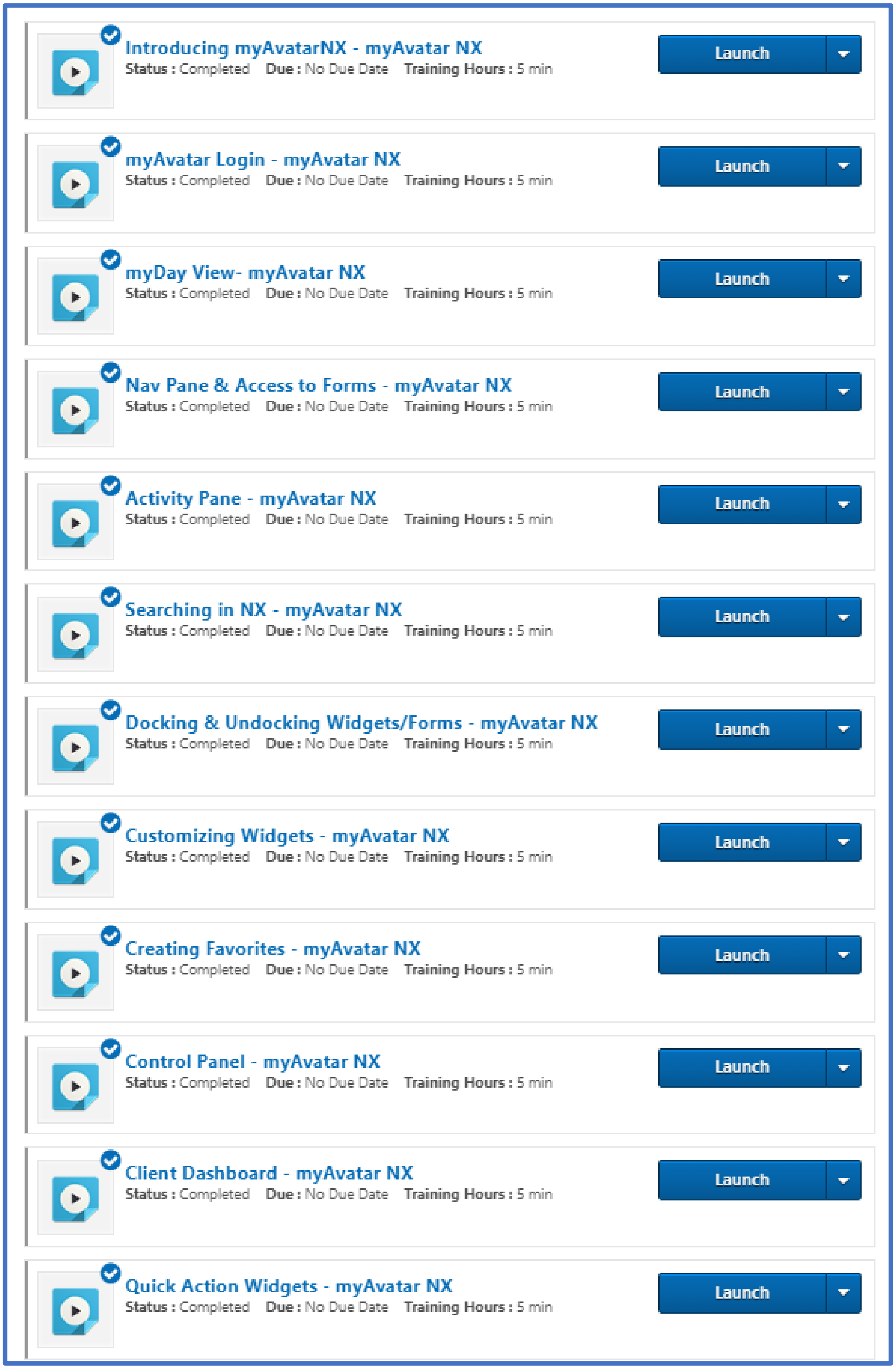


For some trainings, you can launch directly from the register screen because it is not part of a larger series of trainings (a.k.a. "curriculum").



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.



Need More Help with Avatar NX?

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

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.

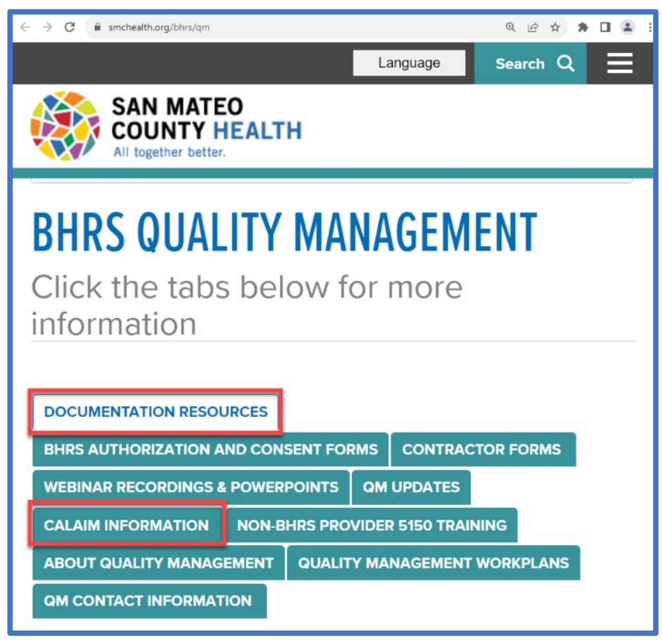
With the exception of password resets and other items specifically noted in this Avatar NX Updates document, all questions regarding Avatar NX should be sent to BHRS ASK QM (or BHRS QM if the issue is regarding your LMS account) QM will look into the issue and will let you know whether or not this issue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