Avatar for Administrators Quick Reference Guides

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QUICK REFERENCE GUIDE—CALL INTAKE

Task	Procedure
Menu Path	Avatar PM→Client Management→Episode Management→Call Intake
Perform a Client Search for a New Client's *First* Contact and Perform the Call Intake	1. Choose Avatar PM→Client Management→Episode Management→Call Intake from the Menu Frame. 2. Enter the search information in the Select Client screen. 3. Click the Search button. 4. If no match is found, click the New button to open the Call Intake window. *Avatar assigns a P # to the new client.* 5. Enter the Call Intake Information (Call Intake tab only). 6. Click the Submit button to save the Call Intake record.
Perform a Client Search for a New Client who has one or more Contacts in the P # Status	1. Choose Avatar PM→Client Management→Episode Management→Call Intake from the Menu Frame. 2. Enter the search information in the Select Client screen. 3. Click the Search button. *The client's name appears in the search results table together with their existing P #.* 4. Click OK. (Do not click New—New would erroneously assign a second P # to the client.) *The Pre-Display screen appears listing all contacts the client has had in the Call Intake status.* 5. Click the Add button to add a new Call Intake under the client's original P #. 6. Enter the Call Intake information (Call Intake tab only). 7. Click the Submit button to save the Call Intake record.

Task	Procedure
Perform a Client Search for a Returning Client with No Open Episodes (*First* Contact)	1. Choose Avatar PM→Client Management→Episode Management→Call Intake from the Menu Frame. 2. Enter the search information in the Select Client screen. 3. Click the Search button. *The client's name appears together with their existing MR # (Client ID).* 4. Click the Episode Display button to open the client's Episode Report. 5. Check that there is a date in the Discharge Date column to verify that the client has no open episodes. 6. Close the Episode Report window. 7. In the Select Client screen, click OK. (Do not click New—New would erroneously assign a P #.) 8. Enter the Call Intake information (Call Intake tab only). 9. Click the Submit button to save the Call Intake record.
Perform a Client Search for a Returning Client with No Open Episodes (*Additional* Contacts)	1. Choose Avatar PM→Client Management→Episode Management→Call Intake from the Menu Frame. 2. Enter the search information in the Select Client screen. 3. Click the Search button. *The client's name appears together with their existing MR # (Client ID).* 4. Click the Episode Display button to open the client's Episode Report. 5. Check that there is a date in the Discharge Date column to verify that the client has no open episodes. 6. Close the Episode Report window. 7. In the Select Client screen, click OK. (Do not click New—New would erroneously assign a P #.) *The Pre-Display screen appears listing all of the client's contacts in the Call Intake status.* 8. Click the Add button to add a new Call Intake under the client's original MR # (Client ID). 9. Enter the Call Intake information (Call Intake tab only). 10. Click the Submit button to save the Call Intake record.

Task	Procedure
Perform a Client Search during a Contact from a Family Member or Other Interested Party	1. Choose Avatar PM→Client Management→Episode Management→Call Intake from the Menu Frame. 2. Enter the search information in the Select Client screen. Use the name of the person the inquiry is about. 3. Click the Search button. 4. If no match is found, click the New button to open the Call Intake window. *Avatar assigns a P # to the prospective client.* 5. Make sure the prospective client's name appears in the Client Name field and enter the name of the person calling in the Caller Name field. 6. Enter the Call Intake information (Call Intake tab only). 7. Click the Submit button to save the Call Intake record. **NOTE:** Additional calls from family members or other interested parties should be entered under the P # assigned during the first call. You click OK, not New, in the Select Client screen to avoid creating a duplicate P # record for the client.
Modify Call Intake Information	1. Choose Avatar PM→Client Management→Episode Management→ Call Intake from the Menu Frame. 2. Enter the search information in the Select Client screen. 3. Click the Search button. 4. Make sure the correct client is selected and click OK. 5. If there is more than one call intake for the client, select the appropriate row in the Pre-Display screen. 6. Click the Edit button. 7. Edit the data you want to change. 8. Click the Submit button to save the changes.

QUICK REFERENCE GUIDE—OPEN EPISODE CALL INTAKE

Task	Procedure
Menu Path	Avatar PM→Client Management→Episode Management→Open Episode Call Intake
Perform a Client Search in Call Intake	1. Choose Avatar PM→Client Management→Episode Management→Call Intake from the Menu Frame. 2. Enter the search information in the Select Client screen. 3. Click the Search button. *The client name appears in the search results table.* 4. Click the Episode Display button to open the client's Episode Report. 5. Check that there is no date in the Discharge Date column. 6. Close the Episode Report window. 7. In the Select Client screen, click the Cancel button to end the Call Intake process.
Perform an Open Episode Call Intake	1. Choose Avatar PM→Client Management→Episode Management→Open Episode Call Intake from the Menu Frame. 2. Enter the intake information (page 1 only). 3. Click the Submit button to save the new intake information.
Edit the Open Episode Call Intake	1. Make sure the client is active in the My Session Frame of the Avatar Homepage. 2. Choose Avatar PM→Client Management→Episode Management→Open Episode Call Intake from the Menu Frame. 3. Choose the desired call in the Pre-Display screen. 4. Click the Edit button. 5. Make the changes in the Open Episode Call Intake window. 6. Click the Submit button to save the changes.

QUICK REFERENCE GUIDE—INITIAL CONTACT SCREENING (ICI)

Task	Procedure
Menu Path	Avatar PM→Client Management→Episode Management→Call Intake Bundle or Open Episode Call Intake Bundle **NOTE:** In some BHRS locations, the administrator completes the Call Information tab of the Initial Contact Screening (ICI) when completing the Call Intake bundle or the Open Episode Call Intake bundle. If administrators in your location do not enter information in the Initial Contact Screening (ICI), click the Close icon on the Options toolbar to close the window and continue with Pre Admit Caseload Assignment.
Complete the Call Information Tab	*If you are using the Call Intake bundle or the Open Episode Call Intake bundle, the Initial Contact Screening (ICI) window opens automatically when you submit the Update Client Data window.* 1. Enter the information on the first three pages of the Call Information tab. 2. Click the Submit icon on the Option toolbar to save the data and open the Pre Admit Caseload Assignment window.

QUICK REFERENCE GUIDE—PRE ADMIT CASELOAD ASSIGNMENT

Task	Procedure
Menu Path	Avatar PM→Client Management→Episode Management→Pre Admit Caseload Assignment
Add a Client to a Clinician's Caseload	1. Make sure your client is active in the My Session Frame on the Avatar Homepage. 2. Choose Avatar PM→Client Management→Episode Management→Pre Admit Caseload Assignment from the Menu Frame. 3. Type all or part of the clinician's name in the Clinician Assignment text box. 4. Click the Process Search button to locate the clinician. 5. If necessary, choose the clinician from the search results list or click OK if the clinician's name appears in a message box. 6. Click the Submit icon.
Remove a Client from a Clinician's Caseload	1. Make sure your client is active in the My Session Frame on the Avatar Homepage. 2. Choose Avatar PM→Client Management→Episode Management→Pre Admit Caseload Assignment from the Menu Frame. 3. Click the clinician's name to select it. 4. Press [F5] to remove the name. 5. Click the Submit icon.
Transfer a P # Client to a Different Clinician	1. Make sure your client is active in the My Session Frame on the Avatar Homepage. 2. Choose Avatar PM→Client Management→Episode Management→Pre Admit Caseload Assignment from the Menu Frame. 3. Type all or part of the clinician's name in the Clinician Assignment text box. 4. Click the Process Search button to locate the clinician. 5. If necessary, choose the clinician from the search results list or click OK if the clinician's name appears in a message box. 6. Click the Submit icon.

QUICK REFERENCE GUIDE—ASSIGN A PERMANENT MR # (CLIENT ID) TO A P # CLIENT

Task	Procedure
Menu Path	Avatar PM→Client Management→Episode Management→Assign Permanent MR #
Assign an MR # (Client ID)	1. If necessary, activate your P # client in the My Session Frame. 2. Choose Avatar PM→Client Management→Episode Management→Assign Permanent MR # from the Menu Frame. 3. Click the Assign Permanent MR # button. 4. When the message appears to auto assign the next ID number, click Yes. 5. Click the Submit icon to save the MR # (Client ID).

QUICK REFERENCE GUIDE—ADMISSION BUNDLE/CSI ADMISSION

Task	Procedure
Menu Path	Avatar PM→Client Management→Episode Management→Admission Bundle (Outpatient)
Perform a Client Search	1. Choose Avatar PM→Client Management→Episode Management→Admission Bundle (Outpatient) from the Menu Frame. 2. Enter the search information in the Select Client screen. 3. Click the Search button. 4. If no match is found, click the New button. 5. If Avatar offers to auto assign an ID number, click Yes. (If you are admitting a P # client who has already been assigned an MR # (Client ID), you will not see this message.)
Perform a Bundled Admission (Admission (Outpatient) Window)	1. Enter the Admission information. 2. Click the Submit icon to display the CSI Admission window.
Perform a Bundled Admission (CSI Admission Window)	1. Enter the CSI information. 2. Click the Submit icon.

Task	Procedure
Edit Admission Information (Non-Bundled)	1. Choose Avatar PM→Client Management→Episode Management→Admission (Outpatient) from the Menu Frame. 2. Perform a client search. 3. In the Pre-Display screen, select the appropriate episode and click the Edit button. 4. Make the desired changes. 5. Click the Submit icon.
Edit CSI Information (Non-Bundled)	1. Choose Avatar PM→Client Management→Client Information→CSI Admission. 2. Perform a client search. 3. In the Episode Selection screen, choose the appropriate episode and click OK. 4. When the message appears asking if you would like to default CSI information from a previous episode, click No. 5. Make the desired changes. 6. Click the Submit icon.

QUICK REFERENCE GUIDE—FINANCIAL ELIGIBILITY

Task	Procedure
Menu Path	Avatar PM→Client Management→Account Management→Financial Eligibility
Add a Guarantor for a Client Who is New to BHRS (No Episodes)	1. Activate your client in your My Session Frame. 2. Choose Avatar PM→Client Management→Account Management→Financial Eligibility from the Menu Frame. 3. Click the Guarantor Selection tab. 4. Click the Add New Item button. 5. Type all or part of the guarantor name in the Guarantor # field. (Use an alphabetic search in this field.) 6. Click the Process Search button. 7. Choose the guarantor from the dropdown list or click OK. 8. In most cases the Guarantor Plan autofills based on Guarantor #. For Medi-Cal and Medicare Palmetto, you must choose the plan from the dropdown list. (If necessary, refer to the Cheat Sheets for Clinics folder in the Admin Sppt Avatar Financial Cheat Sheets folder on the shared drive for guidance.) 9. Choose No for Customize Guarantor Plan. 10. Go to page 2 of the Guarantor Selection tab. 11. Choose Yes for Eligibility Verified except for the Unknown Pending guarantor, which would be No. 12. Enter the Coverage Effective Date. (If necessary, see the Working with Financial Eligibility lesson to determine the date.) 13. Complete the subscriber name and demographic fields if the subscriber is someone other than the client. (If the subscriber is the client, the information autofills from the admission.) 14. Regarding the last three fields on the right side of this page, see “Financial Forms for Client Signature” in the Working with Financial Eligibility lesson for information on forms the client should sign. 15. Go to page 3 of the Guarantor Selection tab. 16. Complete the fields as appropriate. (Refer to MIS for guidance.)

Task	Procedure
	17. Repeat this procedure for each guarantor. 18. Click the Financial Eligibility tab. 19. Choose the Guarantor Order from the Guarantor # dropdown lists. (If necessary, refer to the Cheat Sheets for Clinics folder in the Admin Sppt Avatar Financial Cheat Sheets folder on the shared drive. MIS will verify ranking order.) 20. Click the Submit icon.
Link Guarantor Information for a Client with More Than One Episode	1. If you need to make changes to the guarantors, go to Episode #1 and update it. (When you link to Episode #1, the current episode will copy the Episode #1 data.) 2. Print the forms that the client needs to sign from Episode #1. 3. Click the Submit icon. 4. Choose Avatar PM→Client Management→Account Management→Financial Eligibility from the Menu Frame. 5. When the Episode Selection screen appears, choose the current episode and click OK. 6. Click the Yes button in the Link to Financial Eligibility from Another Episode field. 7. When the Linking to Another Episode... message appears, click OK. 8. Click the Episode to Link To dropdown list and choose Episode #1. (If you click the Guarantor Selection tab, you will not see the guarantors listed. You must click the Submit button and come back into Financial Eligibility if you want to see the populated table.) 9. Click the Submit icon.
Edit Financial Eligibility Information	1. Choose Avatar PM→Client Management→Account Management→Financial Eligibility from the Menu Frame. 2. If the client has more than one episode, always choose Episode #1 to edit. 3. Make the necessary changes. 4. Click the Submit icon to save the changes. (All episodes linked to Episode #1 automatically update with the new information.)

Task	Procedure
	NOTE: Do not edit the social security number in Financial Eligibility. Edit the social security number through Admission (Outpatient), Admission Bundle (Outpatient), or Update Client Data.

QUICK REFERENCE GUIDE—FAMILY REGISTRATION (UMDAP)

Task	Procedure
Menu Path	Avatar PM→Client Management→Family and UMDAP Management→Family Registration
Register a New Family	1. Choose Avatar PM→Client Management→Family and UMDAP Management→Family Registration from the Menu Frame. 2. In the Select Family screen, enter the client's name in this format: LASTNAME,FIRSTNAME. 3. Click the Select Family Name/ID# Search button. 4. When the Not Found message appears, click OK. 5. Click the New button. 6. When the New ID message appears, click OK. 7. Enter the family billing address and zipcode. (If the party responsible for the monthly payment is other than the client, that person's name should appear at the beginning of the Family's Address – Street field: C/O OLIVIA OREGANO, 123 CHERRY BLOSSOM LANE. If necessary use the second address field.) 8. Enter the Family Activation Date (first day of month in which the UMDAP occurs). 9. Click the Family Members tab. 10. Click the Add New Item button. 11. Enter the client's name in the Client ID# field in this format: LASTNAME,FIRSTNAME. 12. Click the Process Search button. 13. Choose your client from the dropdown list or click OK. 14. Choose the Type of Family Member. 15. Choose the Relationship to Head of Household. 16. Enter the Start Date of Family Membership (same date as the Family Activation Date). 17. Continue with the next steps listed in this table, "Enter the UMDAP Information."

Task	Procedure
Enter the UMDAP Information	1. Click the UMDAP Information tab. 2. Click the Add New Item button. 3. Enter the Start Date of UMDAP Year (first day of the month in which the UMDAP occurs). 4. Enter the Financial Liability information. 5. Move to page 2 of the tab. 6. Enter the Asset Determination values. 7. Move to page 3 of the tab. 8. Enter the Allowable Expenses. 9. Move to page 4 of the tab. 10. Complete the required (red) fields on pages 4 and 5 of the UMDAP Information tab. 11. Click the Submit icon to save the information. 12. Run the UMDAP report. See "Run the UMDAP Report" in this Quick Reference Guide for the steps to run the report. 13. Print the UMDAP report for the client's signature. 14. Close the report window. 15. Choose Avatar PM→Client Management→Family and UMDAP Management→Family Registration from the Menu Frame. 16. Go to page 4 of the UMDAP Information tab. 17. Enter the monthly payment that appears on the report in the Agreed Monthly Payments to Satisfy Above Liability field. 18. Click the Submit icon.

Task	Procedure
Run the UMDAP Report	1. Choose Avatar PM→ Reports→Payor UMDAP <specify language> from the Menu Frame. 2. If the Select Client screen appears, enter the client's name or MR # (Client ID) in the Client Name/ID # field. If the Select Client screen does not appear, skip to step 6. 3. Click the Select Client Name/ID# Search button. 4. If necessary, select the client name from the Select Client list at the bottom of the screen. 5. Click OK. 6. Choose the UMDAP Effective Date from the dropdown list. 7. Click the Process button. 8. Print the report for the client's signature. 9. Click the Close button in the upper-right corner of the report window. 10. Click the Close button on the Option toolbar of the Payor UMDAP window.
Registering *Additional* Family Members (BHRS Clients) Who Have the Same Party Who is Responsible for BHRS Bills	1. Choose Avatar PM→Client Management→Family and UMDAP Management→Family Registration from the Menu Frame. 2. In the Select Family screen, enter the Family Name of the first client to enter the BHRS system. 3. Click the Select Family Name/ID# Search button. 4. Click OK to open the Family Registration window. 5. Click the Family Members tab. 6. Click the Add New Item button. 7. Enter all or part of the client's name in the Client ID# field. 8. Click the Process Search button. 9. Choose your client from the dropdown list or click OK. 10. Choose the Type of Family Member. 11. Choose the Relationship to Head of Household. 12. Enter the date this client's episode opened. 13. Click the Submit icon.

QUICK REFERENCE GUIDE—ASSIGN TO CASELOAD AND REMOVE FROM CASELOAD

Task	Procedure
Menu Path	Avatar PM→Client Management→Episode Management→BHRS Assign to Caseload
Add a Clinician to a Treatment Team	1. Make sure the client is active in your My Session Frame on the Avatar Homepage. 2. Choose Avatar PM→Client Management→Episode Management→BHRS Assign to Caseload from the Menu Frame. 3. Use the Process Search feature to locate the team member. 4. It is recommended that you add a note to further explain the assignment including the reason for the assignment and the assignment date. 5. Click the Submit icon on the Option toolbar to save the information.
Remove a Clinician from a Treatment Team	1. Make sure the client is active in your My Session Frame on the Avatar Homepage. 2. Choose Avatar PM→Client Management→Episode Management→BHRS Assign to Caseload from the Menu Frame. 3. In the blue dropdown field, click the name of the clinician once. 4. Press the [F5] key on the keyboard to remove the clinician's name. 5. If there is a note related to this team member, delete it. 6. Click the Submit icon on the Option toolbar to save the change.

QUICK REFERENCE GUIDE—CLIENT RELATIONSHIPS

Task	Procedure
Menu Path	Avatar PM→Client Management→Client Information→BHRS Client Relationships
Add a Client Relationship	1. If necessary, activate the client in your My Session Frame. 2. Choose Avatar PM→Client Management→Client Information→BHRS Client Relationships from the Menu Frame. 3. Click the Relationships tab. 4. Click the Add New Item button. 5. Enter the information in the bottom half of page 1 of the Relationships tab. 6. Click the Forward icon to move to page 2. 7. Enter the appropriate choices and information on this page. 8. Click the Back icon to return to page 1. 9. Repeat steps 4 through 8 for each new relationship. 10. Click the Submit icon to save the changes.
Edit a Client Relationship	1. If necessary, activate the client in your My Session Frame. 2. Choose Avatar PM→Client Management→Client Information→BHRS Client Relationships from the Menu Frame. 3. Click the Relationships tab. 4. Click the row you want to edit. 5. Click the Edit Selected Item button. 6. Make any desired changes in the information in the bottom half of page 1 of the Relationships tab. 7. Click the Forward icon to move to page 2. 8. Make any changes in the information on this page. 9. Click the Submit icon to save the changes.

Task	Procedure
Delete a Client Relationship	1. If necessary, activate the client in your My Session Frame. 2. Choose Avatar PM→Client Management→Client Information→BHRS Client Relationships from the Menu Frame. 3. Click the Relationships tab. 4. Click the row you want to delete. 5. Click the Delete Selected Item button. 6. When the message appears verifying that you want to delete the item click Yes. 7. Click the Submit icon to save the change.

QUICK REFERENCE GUIDE—DIAGNOSIS

Task	Procedure
Menu Path	Avatar PM→Client Management→Client Information→Diagnosis
Enter a Diagnosis	1. Choose Avatar PM→Client Management→Client Information→Diagnosis from the Menu Frame. 2. Choose the type of diagnosis. *BHRS does not use the Onset diagnosis option.* 3. Enter the date of the clinician's signature as the Date of Diagnosis. 4. Enter the current time as the Time of Diagnosis. 5. Complete the remaining fields based on the information in the paper diagnosis form provided by the clinician. 6. Click the Submit icon to save the information.
Edit a Diagnosis	1. Choose Avatar PM→Client Management→Client Information→Diagnosis from the Menu Frame. 2. Make the editing changes. 3. Click the Submit icon to save the changes. **NOTE:** Do not edit a diagnosis when there is a change in the client's diagnosis. Enter a new diagnosis and mark it as an Update Diagnosis.

QUICK REFERENCE GUIDE—BHRS OUTPATIENT PROGRESS NOTE/APPEND PROGRESS NOTE

Task	Procedure
Menu Paths	Avatar CWS→Progress Notes→BHRS Outpatient Progress Note Avatar CWS→Progress Notes→Append Progress Note
Document the Service Details	1. Choose Avatar CWS→Progress Notes→BHRS Outpatient Progress Note from the Menu Frame. 2. Choose New Service in the Progress Note For field. 3. Enter the Date of Service. 4. Enter 56 in the Service Charge Code field and tap [Enter]. 5. Enter the Service Duration in minutes. 6. Choose Does Not Require Co-Signature from the Note Type dropdown list. 7. Navigate to Page 2. 8. Type your note in the Notes Field. 9. Select Draft or Final. 10. Click the Submit icon.
Append a Progress Note	1. Choose Avatar CWS→Progress Notes→Append Progress Note from the Menu Frame. 2. Choose Does Not Require Co-Signature from the Note Type dropdown list. 3. Choose the note you want to append from the List of Notes dropdown list. 4. Go to page 2. 5. Enter the additional information for the Progress Note. 6. Click the Submit icon.

QUICK REFERENCE GUIDE—REGISTERING THERAPY GROUPS

Task	Procedure
Menu Path—Register a Group and Assign Members	Avatar CWS→Appointment Scheduling→Group Management→Group Registration
Registering a Group and Assigning Members	1. Choose Avatar PM→Appointment Scheduling→Group Management→Group Registration from the Menu Frame. 2. When the Select Group screen appears, type the name of the new group in ALL CAPS in the Group Name/ID# field. 3. Click the Select Group Name/ID # Search button. 4. When the Not Found message appears, click OK. 5. Click the New button at the bottom of the screen to begin registering the group. 6. When Avatar offers to auto assign the next ID number, click Yes. 7. When the New ID message appears, click OK. *The group name should autofill from the Select Group screen.* 8. If the Group Name is not populated, type the Group Name in ALL CAPS. 9. Click the T button to enter today's date as the Group Registration Date. 10. Click the Group Member Assignment tab. 11. Click the Add New Item button to add a new row to the Group Member Assignment table. 12. Conduct a Process Search to locate the first group member. 13. Select the client's billing episode from the Episode Number dropdown list. 14. Click the T button to enter today's date in the Group Assignment Start Date field. 15. Do not enter an end date. 16. Repeat steps 11–14 for each client you want to add to the group. 17. Click the Submit button.

Task	Procedure
Deleting Members from Or Adding Members to an Existing Group	1. Choose Avatar PM→Appointment Scheduling→Group Management→Group Registration from the Menu Frame. 2. When the Select Group screen appears, type the name of the group in the Group Name/ID# field. 3. Click the Select Group Name/ID # Search button. 4. When Avatar locates the group, if necessary, choose the group name from the Select Group list. 5. Click OK. 6. When the Group Registration window appears, click the Group Member Assignment tab. 7. If you want to delete a member, click the row you want to delete and then click the Delete Selected Item button. Click Yes when the message appears. 8. If you want to add a member, follow these steps: a. Click the Add New Item button. b. Type the client's name in the Client field and click the Process Search button. c. Click OK, or if necessary, choose the client's name from the list in the Process Search field. d. Choose the client's billing episode from the Episode Number dropdown list. e. Click the T button to enter today's date in the Group Assignment Start Date field. 9. Click the Submit button.

Task	Procedure
Menu Path—Print the List of Group Members	Avatar PM→Appointment Scheduling→Group Management→Group Member Listing
Printing a Roster	1. Choose Avatar PM→Appointment Scheduling→Group Management→Group Member Listing from the Menu Frame. 2. Click the Individual radio button. 3. Conduct a Process Search to locate the group. 4. Click the Process icon on the Option toolbar. 5. When the roster appears, click the Print button at the bottom of the screen. 6. When the Print dialog box appears, click the Print button. 7. When the Printing Complete message appears, click OK. 8. Click the Stop/Dismiss button at the bottom of the screen. 9. When the Option Return message appears, click Yes. 10. Click the Close icon on the Option toolbar to close the window.

QUICK REFERENCE GUIDE—UPDATE CLIENT DATA

Task	Procedure
Menu Path	Avatar PM→Client Management→Client Information→Update Client Data
Update Client Data	1. If necessary, activate the client in your My Session Frame. 2. Choose Avatar PM→Client Management→Client Information→Update Client Data from the Menu Frame. 3. Update client data, as appropriate, on pages 1 and 2 of the Update Client Data tab. 4. Click the Submit icon to save your changes.

Quick Reference Guide—Discharge Clients

Task	Procedure
Menu Path	Avatar PM→Client Management→Episode Management→Discharge (Outpatient)
Discharge a Client from an Episode	1. If necessary, activate the client in your My Session Frame. 2. Choose Avatar PM→Client Management→Episode Management→Discharge (Outpatient) from the Menu Frame. 3. Enter the information on the Discharge tab and add a comment if appropriate. 4. Click the Demographics tab. 5. Enter any changes to the client's demographics information. 6. Click the Submit icon to save the changes.

Quick Reference Guide—Client Charge Input/Recurring Client Charge Input

Task	Procedure
Menu Path for Client Charge Input	Avatar PM→Services→Ancillary/Ambulatory Services→Client Charge Input
Enter Client Charges for an Individual Therapy Session	1. Choose Avatar PM→Services→Ancillary/Ambulatory Services→Client Charge Input from the Menu Frame. 2. Enter the client charge information on page 1. (BHRS does not use pages 2 and 3.) 3. Click the Submit icon to save the information. 4. Click No when the message appears asking if you want to return to the option.
Menu Path for Recurring Client Charge Input	Avatar PM→Services→Ancillary/Ambulatory Services→Recurring Client Charge Input
Enter Recurring Client Charges	1. Choose Avatar PM→Services→Ancillary/Ambulatory Services→Recurring Client Charge Input from the Menu Frame. 2. Enter a From and Through date. 3. Indicate if weekends are included. 4. Check the appropriate dates in the Service Dates field. ([Ctrl]+[A] checks all checkboxes.)

Task	Procedure
	5. Click the Client Charge Input tab. 6. Complete the appropriate fields in this tab. 7. Click the Submit icon to save the information. 8. Click No when the return to option message appears.

QUICK REFERENCE GUIDE—SET UP A CLIENT ALERT AND VIEW AN URGENT CARE PLAN

Task	Procedure
Menu Path	Avatar PM→RADplus Utilties→Client Alert Management→Client Alert
Create a Client Alert	1. Choose Avatar PM→RADplus Utilties→Client Alert Management→Client Alert from the Menu Frame. *If previously entered alerts exist, the Pre-Display screen appears. Click Add to create a new alert.* 2. In the Type of Alert field, select the desired alert from the dropdown list. 3. Select a start and end date for the alert. (The alert should never exceed 18 months.) 4. In the Episode(s) field, select a specific episode or leave All Episodes checked to control where the alert appears. 5. Click the Submit icon to activate the Client Alert.
Edit a Client Alert	1. Choose Avatar PM→RADplus Utilties→Client Alert Management→Client Alert from the Menu Frame. 2. When the Pre-Display screen appears, select the alert you want to edit and click the Edit button. 3. Enter the desired changes. 4. Click the Submit icon to save the changes.
View an Urgent Care Plan	1. Select the client. 2. Open any Avatar window. 3. Click the Chart Review button in the bottom-right corner of the window. 4. When the Chart Review screen opens, double-click the green triangle in front of Urgent Care Plan. 5. If there is more than one plan listed, double-click the one at the top to open the most recent Urgent Care Plan.

Task	Procedure
	6. After reading the plan, click the STOP/Dismiss button in the bottom-right corner of the window to close it. 7. If you do not want to work with the window you opened in step 2, click the Close icon on the Options toolbar to close the window.

QUICK REFERENCE GUIDE—EDIT SERVICE INFORMATION

Task	Procedure
Menu Path	Avatar PM→Services→Ancillary/Ambulatory Services→Edit Service Information
Edit a Client's Service Information	1. Choose Avatar PM→Services→Ancillary/Ambulatory Services→Edit Service Information from the Menu Frame. 2. Conduct a Process Search to locate the client. 3. Choose the episode to edit. 4. Enter the service start and end dates. 5. Click the Select Service(s) to Edit button. 6. In the Select Service(s) to Edit window, check the service(s) you want to edit. 7. Click OK. 8. Edit the information you wish to change in pages 1 and 2 of the Edit Service Information tab. 9. Click the Submit icon to save the changes.

QUICK REFERENCE GUIDE—SCAN AND VIEW DOCUMENTS

Task	Procedure
Menu Path	Avatar CWS→Document Management→POS Scan
Set Up to Scan or Import Documents	1. Choose Avatar CWS→Document Management→POS Scan from the Menu Frame. 2. Choose Client from the Type dropdown list. 3. Choose the client name from the Client dropdown list. 4. Select an episode from the Episode dropdown list. 5. Choose a form from the Form dropdown list.
Scan a Document	1. Place the document face down in the scanner. 2. Click the scan button in the TWAIN Driver window. 3. When the scanned document appears in the Document Imaging and Archiving – POS window, verify that the document is readable. If not click the Close Document button in the left-hand panel and re-scan the document.

Task	Procedure
View Scanned Documents	1. Choose Avatar CSW→Document Management→Clinical Document Viewer from the Menu Frame. 2. Select Client to locate document for a specific client or select Staff to locate documents scanned by a specific staff member. 3. Select All or Individual—typically Individual. 4. Select the client. 5. Select the User if desired. 6. Enter Start and End dates to select from a date range for documents. 7. Choose By Categories/Forms. 8. Click the Select button. 9. Place a checkmark next to the document category you want to view. (Contact QM if you need to print a restricted document.) 10. Click OK. 11. Choose the client's episode. 12. Check POS Scan Import. 13. Choose whether to include or exclude restrictions if you want to narrow your search. 14. Click the Process button 15. Select the row for the document you want to view. 16. Click the View button. 17. If desired, click the Print button and click OK in the Print dialog box. 18. If you want to print another document, click the Close All Documents button and select another row to print. 19. Click the X on the document Viewer tab in the lower-left corner of the window to return to the Avatar Homepage.