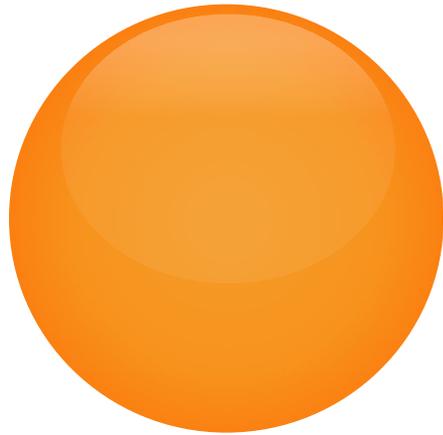October 15, 2014 10:00- 11:30 am

Avatar

Client Look up, Episode Opening & Closing, Updating Client Demographics, & Client Relationships

Presenter Alys C. Herring

Provider Analyst

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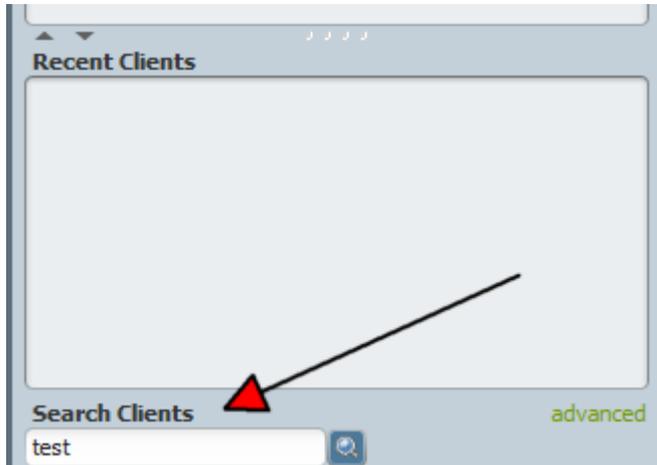BHRS , 225 37th, Room 300, San Mateo, CA 94403

Today's Agenda

Client Lookup — 1

Episode Opening — 2

Client Relationship & Client Update — 3

Episode Closing — 4

1 **AVATAR** Client Lookup

Avatar   Client Lookup

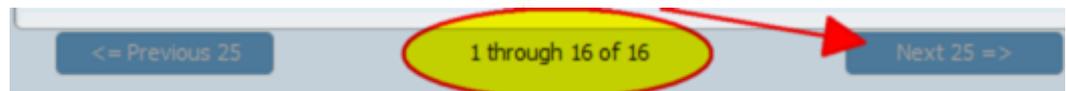**Clients can be searched in Avatar various ways: by Avatar ID, Birth date, SSN, Alias, Last Name**

Steps

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

2. Avatar utilizes "**Smart Search**" all clients with the same last name or sounding like your client's last name will appear. For the name "Test" there are 16. If there were more they would appear on the "Next 25"
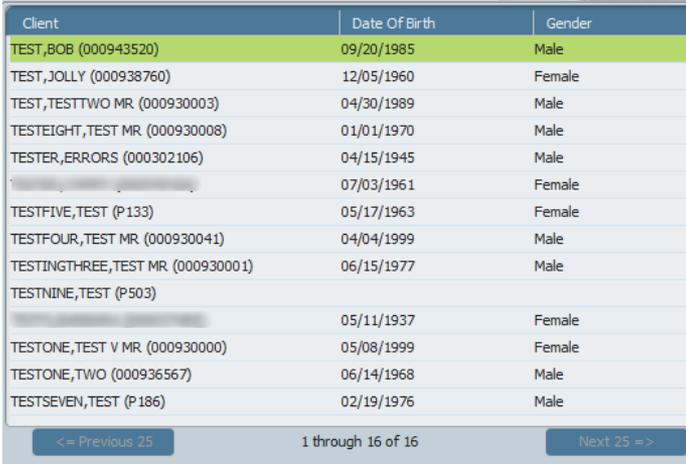
3. By clicking on a client, it becomes highlighted (green).

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

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

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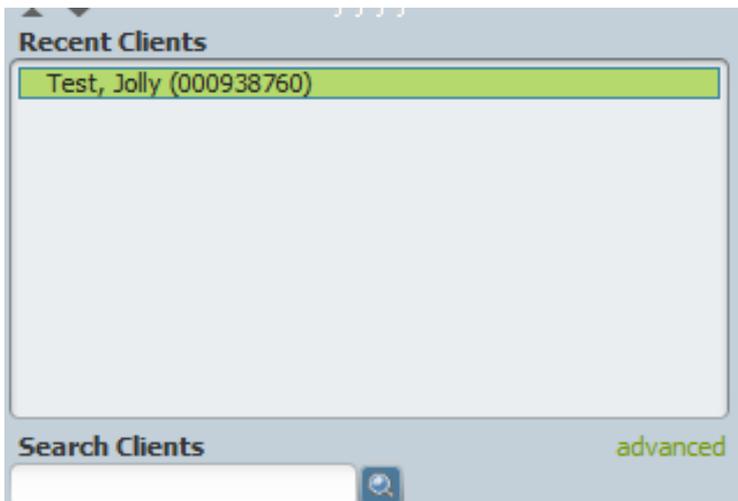
Recent Clients

Test, Jolly (000938760)

Search Clients   advanced

Avatar Episode Opening

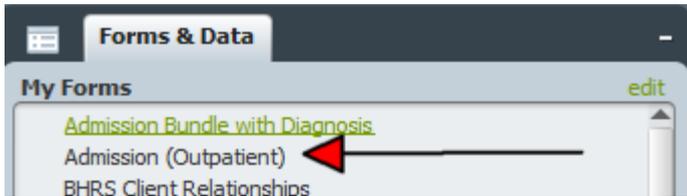**Admission (Outpatient)**

Red=Required fields

Episode is auto assigned and cannot be changed

Avatar Episode Opening (Admitting a New Client)

Steps

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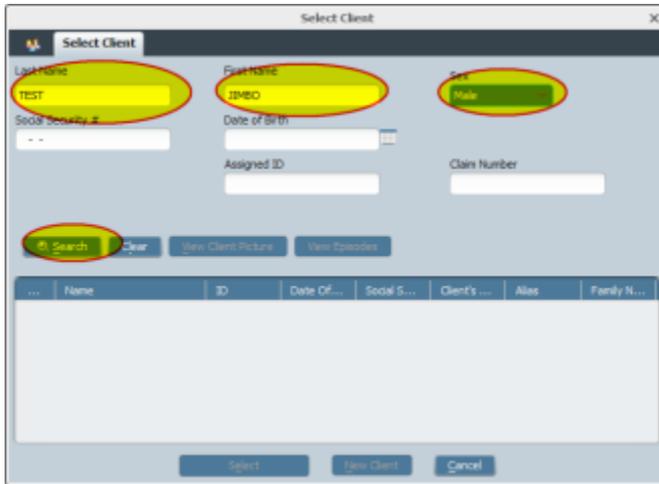

2. Select **Admission Outpatient** form from your list of forms, the **Select Client** box should appear
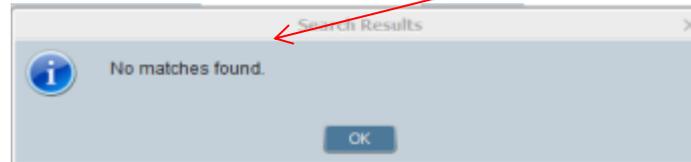
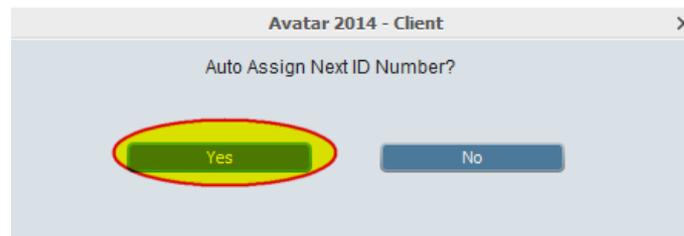3. In the Select Client screen, enter the client last name, first name, and sex. Click Search.

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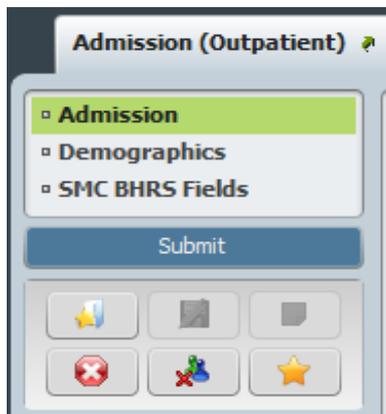

5. click **New Client.**

6. The Auto Assign dialog display, Click **Yes** to generate an ID number.
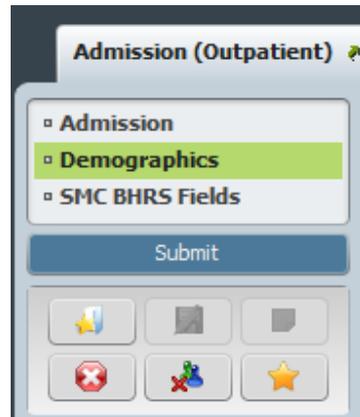
Avatar   Admission (Section)

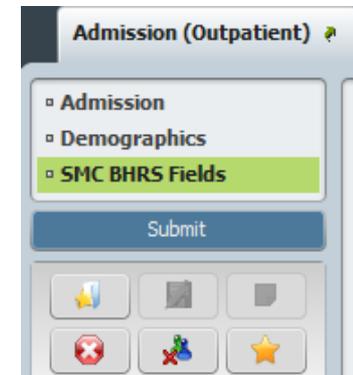The Admission (Outpatient) form is divided in 3 sections

1. Admission

2. Demographics

3. SMC BHRS Fields

This section is currently not being used

Avatar Admission (Section)

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

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

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

Avatar　Demographics (Section)

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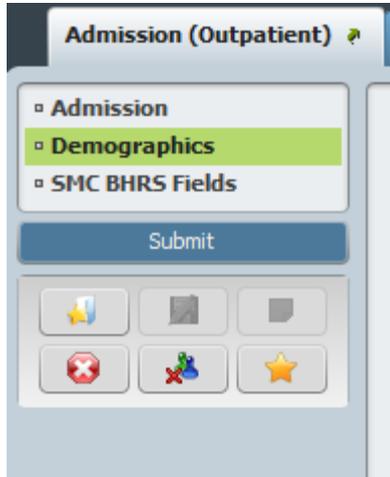

Use this field to enter ALIAS information only

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

Avatar   Demographics (Section)

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

Now you've just completed an Episode Opening.
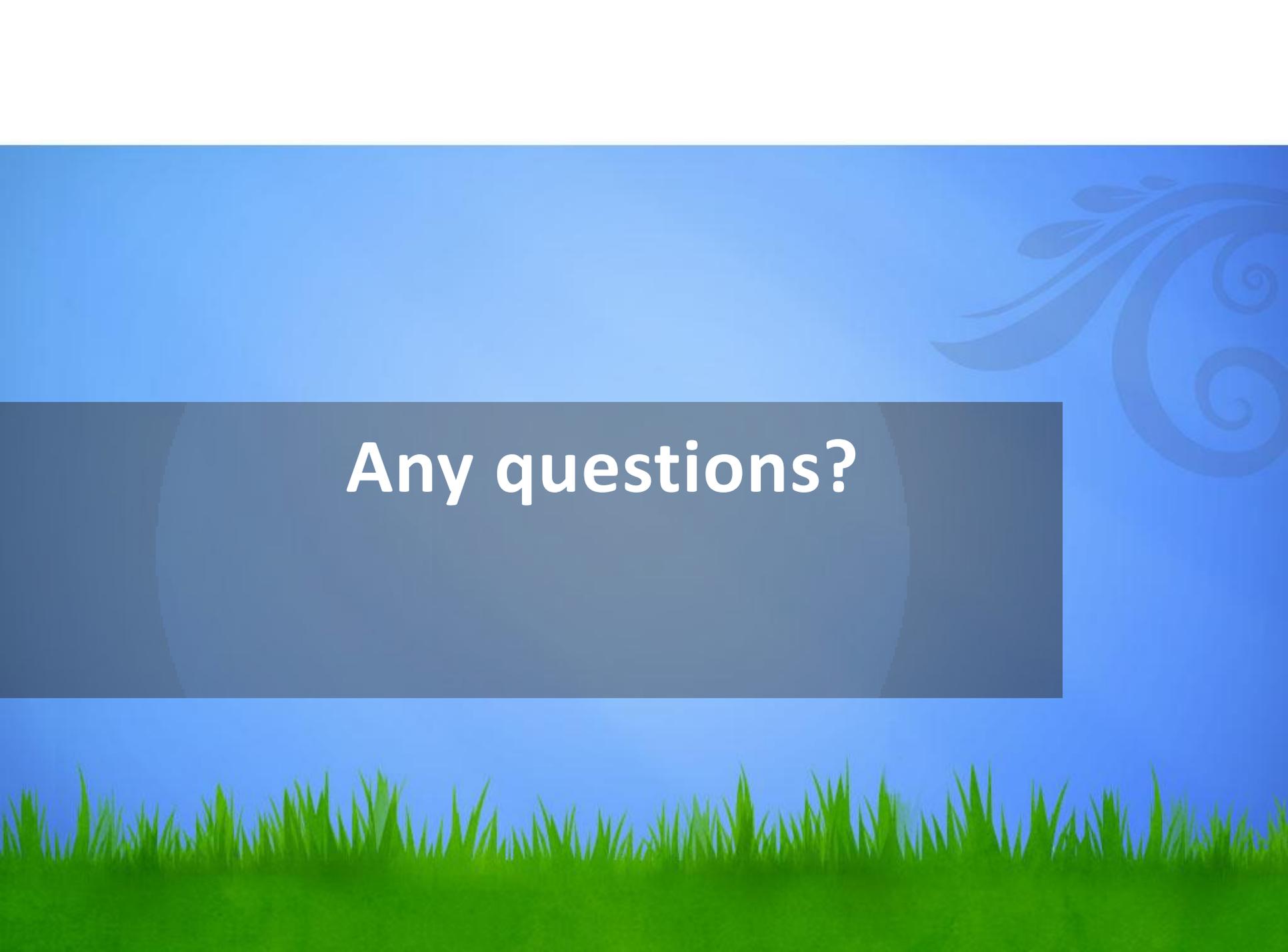
Any questions?

3 **Avatar** Client Relationship & Client Update

BHRS Client Relationship

Red=Required fields

Avatar BHRS Client Relationship (adding a new contact)

Select **BHRS Client Relationship** form from your list of forms, the **Select Client** box should appear
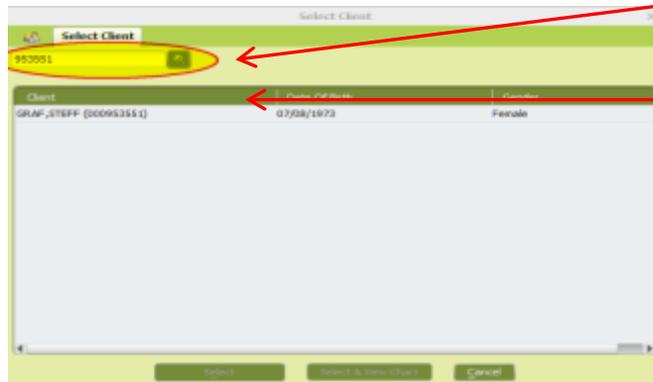
Enter Client ID or Type in last name, first name

Select the Client

Avatar BHRS Client Relationship

The BHRS Client Relationship form has 2 sections

1. Entry Date

2. Relationships

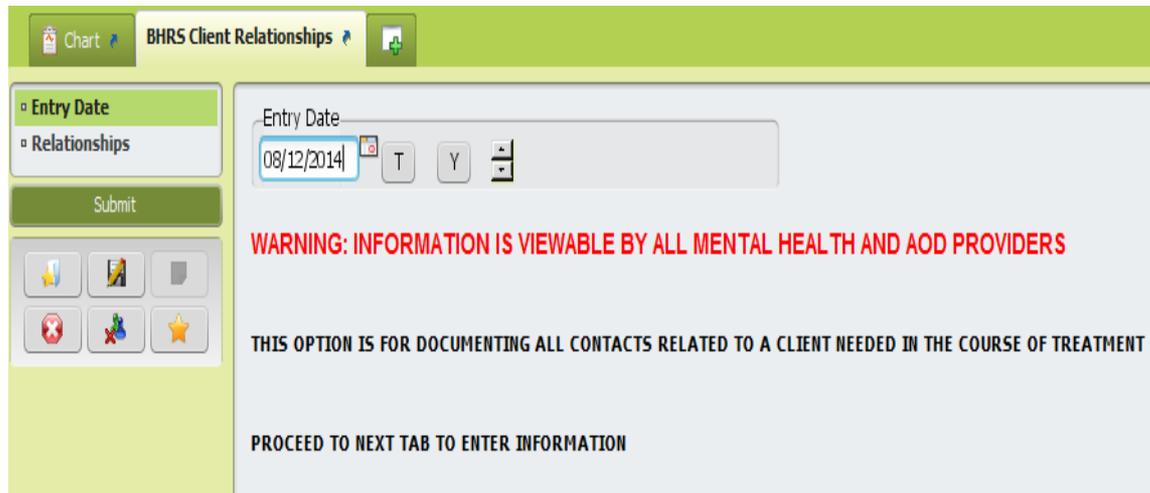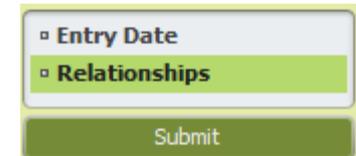Warning: Information is viewable by all Mental Health and AOD Providers

Avatar   BHRS Client Relationship (adding a new contact)

a new line **(green)** is added

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

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

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

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

Click **"Submit"** to save form

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

Use this field to enter ALIAS information only

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

questions?

4 **Avatar** Episode Closing

Episode Closing - Discharge (Outpatient)

Red=Required fields

Avatar   Episode Closing - Discharge (Outpatient)
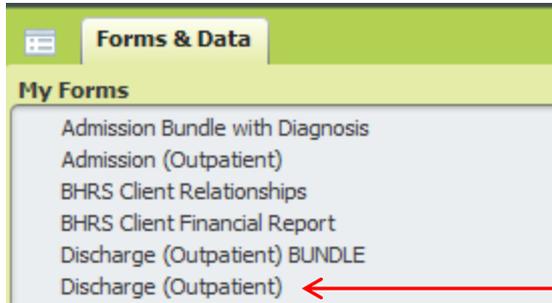
Select **Discharge (Outpatient)** form
Forms & Data

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

Avatar   Episode Closing - Discharge (Outpatient)

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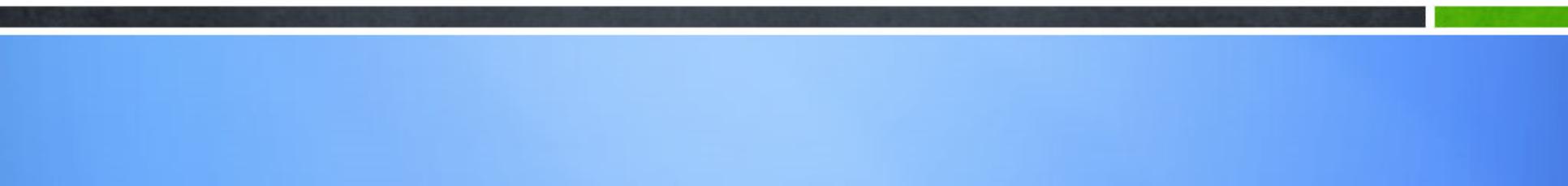
When finished, click **Submit.**

Q & A

Any questions?

Thank you for attending

Next Webinar – Friday, October 24, 2014 2:00 – 3:30 PM
Contractor TX Plan (includes Assessment Date & Consent to Treatment Date), Contractor LOCUS & CALOCUS, Diagnosis (Admission & Update), CSI Admission

Questions can be sent to aherring@smcgov.org or 650-573-3538

Avatar

Client Look up, Episode Opening & Closing, Updating Client Demographics, & Client Relationships