Reports and Scanning in Avatar

October 30, 2014 10:30 – 12:00 pm

Presented by Alys C. Herring
Today’s Agenda

How to access Reports in Avatar:
  What reports are available?
  Management Reports vs Clinical Reports
  How to run reports in Avatar

Importing Documents
  What’s needed in order to import into Avatar?
  How to Import into Avatar
Update: Credentialing Form Submission

- When submitting Credentialing forms for Therapist/Billing Number please submit a printed copy of the NPI Number from the NPI website.

- The NPI taxonomy number needs to match the discipline selected on the Credentialing Form

- Therapist Number Only
- Avatar Access
How to Access Reports in Avatar

- Reports are located in Avatar PM and CWS

Menu Path > Avatar PM > Reports /  Menu Path > Avatar CWS > Reports /

Browse Forms
- Avatar PM
- Avatar CWS

Reports
- Assessments
- Consents
- Progress Notes
- Treatment Planning

- [Tree View]
  - MH Client Dashboard
  - Face Sheet
  - Episode Display
  - Progress Note Reports
  - Assessment Reports
  - Medical Reports
  - Caseload Reports
  - Documentation Status Reports
  - Day Treatment Reports
  - Unused Reports
  - O.D. / W.I.C.C. Status Report
  - Skills and Assessment Referrals Report
  - Activity Tracking Report
  - Call Intake History Report
  - Transfer/Discharge Request Report
  - AOD Client Dashboard
  - AOD Documentation at a Glance
  - AOD ASI Open/Closed Status
  - Progress Note Timeliness Summary Report
**What Reports are Available?**

A few of the reports available in Avatar. To see a full list log in Avatar to view under Reports in both PM & CWS

<table>
<thead>
<tr>
<th>Avatar PM</th>
<th>Avatar CWS</th>
</tr>
</thead>
<tbody>
<tr>
<td>1. BHRS TX Plan Audit</td>
<td>1. MH Client Dashboard</td>
</tr>
<tr>
<td>2. BHRS Episode Display</td>
<td>2. Progress Notes Report by Clinician</td>
</tr>
<tr>
<td>4. BHRS Client Vitals</td>
<td>4. Assessment Overdue Status Report</td>
</tr>
<tr>
<td>5. BHRS Units of Service by Program</td>
<td>5. Treatment Plan Overdue Status Report</td>
</tr>
<tr>
<td>6. Client Service Report</td>
<td></td>
</tr>
</tbody>
</table>
Management Reports vs Clinical Reports

What’s the difference?

Management Reports are reports managers use to track Program/Agency Compliance

Clinical Reports are reports used in the clinical care of clients
Reporting Criteria

Reports use a variety of search criteria:

- Program
- Start Date and End Date
- Staff/Clinician
- Staff & Location
- Client
- Program w/wo Staff Distribution (printed to show individual Clinician's caseloads)
How to run a Report in Avatar

Select from Forms & Data widget > My Forms

Or

1. Search for a report by typing a partial name (e.g. doc) in Browse Forms

2. Smart search will produce a list of forms matching what you typed. Once you select the form its highlighted (green), double click, the report opens
Running Reports

3. Report Forms appears

4. Enter the report criteria
   Red is required

5. Press Process to run

5a. If this is the first time the report has been run, it may ask to download from server, select OK

6. Do you wish to return to the form (means do you want to run the report again)
Running Reports

![Image of documentation at a glance report](image.png)

**San Mateo County Behavioral Health and Recovery Services**

**DOCUMENTATION AT A GLANCE REPORT**

For all staff at...

<table>
<thead>
<tr>
<th>Client</th>
<th>Assessment Date</th>
<th>Care Coordinator</th>
<th>Treatment Plan</th>
<th>Assessment In Use</th>
<th>Primary Diagnosis</th>
<th>Last Service</th>
</tr>
</thead>
<tbody>
<tr>
<td><strong>AHSI, TAMIM (004457)</strong></td>
<td></td>
<td></td>
<td></td>
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<tr>
<td></td>
<td>04/01 7/21/2014</td>
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<tr>
<td></td>
<td>Weeks Open: 14</td>
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<tr>
<td></td>
<td>HP SIM Care Advantage Client</td>
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<td>08/01 2/18/2014</td>
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<tr>
<td></td>
<td>Weeks Open: 28</td>
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</tr>
<tr>
<td></td>
<td>HP SIM Care Advantage Client</td>
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<td>08/01 1/1/2014</td>
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<tr>
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<td>Weeks Open: 9</td>
<td></td>
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<td></td>
</tr>
<tr>
<td></td>
<td>Medi-Cal Client</td>
<td></td>
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</tr>
</tbody>
</table>

**Please Note:**

- Care Co-ordinator is responsible for Annual Assessment update by the Anniversary date of each year.
- For Clients who are not currently appearing on your caseload, contact your Aide, Support Staff, ROH or Needs Assessment.
- DRAFT: Documentation is incomplete.

See California Welfare and Institutions Code Section 1523.
Management Reports
Recommended Reports for Managers

1. Documentation at a Glance
2. Assessment Overdue Status Report
3. Treatment Plan Overdue Status Report
4. BHRS Units of Service Summary By SF
5. MH Client Dashboard
Management Reports

Documentation Status Reports

Menu Path>Avatar CWS>Reports>Documentation Status Reports

1. Assessment Overdue Status Report
2. Treatment Plan Overdue Status Report
3. Documentation At A Glance

Search Parameters: Program, Print for Staff Distribution
Management Reports

Service Reports

Menu Path>Avatar PM>Reports
Menu Path>Avatar PM>Reports>Service Reports

1. BHRS Units of Service Summary By SF
2. BHRS Units of Service Reports by Program
3. BHRS Units of Service By Practitioner

Search Parameters: Program, State Date, End Date, Program

![Diagram showing search parameters and data options]
Clinical Reports

1. MH Client Dashboard
2. Documentation at a Glance
Questions?
Viewing Progress Notes

The best way to view the Progress Notes in Avatar is through Chart View.

Search and Select the client, double click to open chart view.
Viewing Progress Notes

Search for notes from Previous **365** days by changing default 30 days to 365. Click on note to refresh.

Displays all notes from past year.

**Highlights**
- Type of Note
- Practitioner
- Date of Service
- Location
- Services Provided

**Day Treatment Daily Note**

- Practitioner: BULL, INGALL (G60050)
- Week of Service (use Monday date): 09/15/2014
- Date of Service: 09/18/2014
- Service Program: Do Not Change; 410101 NORTH COUNTY ADULT (410101)
- Location: OFFICE
- Service Charge Code (Only Use Day Treatment codes): PLAN DEVELOPMENT (6)
- Service Duration (in minutes): 245
- Services Provided Today: Other Family, Sig. Support Person Contact, Crisis Services, Adjunctive Therapy Group, Process Group, Family Psychotherapy, Therapeutic Milieu (Always Check)

Select T.P. Version: Client Treatment and Recovery Plan

Note Addresses Which Treatment Plan Problem:
- Treatment Plan Item: Unable to maintain employment due to anxiety

Notes Field:
- Behavior/Goal addressed:
- Interventions:
- Response to interventions:

Note Type: (3) BHRS Standard Note
Viewing Assessments in Chart View

Chart View, Assessments can be accessed through Client Views.

Click on the report to view Adult Assessment v2.
Questions?
Understanding Importing Documents into Avatar

Avatar provides Point of Service (POS) for scanning and importing. POS allows users to importing documents quickly and easily into Avatar.

Importing client-related documents into Avatar assures that key clinical information can be electronically shared throughout BHRS.
What’s needed to Import/Scan

In order to import/scan into Avatar - Computers must have the following: AvatarPOS software installed either 32-bit or 64bit.

2. Scanner or copier which has the ability to create PDF’s.

It’s recommended that a central folder be created to house the PDF’s on a secure server due to the PHI.

Scanned copies of TX Plans and Assessments should not be left unsecure on laptops without Encryption software installed.
Importing - Episodic vs Non-Episodic

Episodic - Only **Client Treatment Plans** are tied to a specific episodes. The episode must be identified when importing into Avatar.

All other documents are **Non-Episodic**. (Assessments, Consents, Progress Notes, Other Correspondence)
**Accessing POS Scan**

- Avatar CWS > Document Management > POS Scan / POS SCAN 64

Once you click on POS Scan, application opens.

For 32-bit machines:

- Clinical Document Viewer
- Document Management Definition
- POS SCAN 64
- Delete Document
- Document Archiving
- Document Management Defaults
- Electronic Signature Agreement

For 64-bit machines:

- POS Scan
How to import into Avatar

- **A) Type**
  - Select **Client** from Dropdown Menu

- **B) Client**
  - Type the last name or MH number of the client whose record you are attaching the imported document to and tap [Enter] to select the full client name. If there is more than one client with the same last name, use the dropdown list to select the correct client.

- **C) Episode**
  - Select the episode for **Client Treatment Plans ONLY**. Select **Non-Episodic** from the Episode field for all **OTHER** imported documents.

- **D) Origination**
  - **Date**
  - The date listed on the Document

- **E) Form**
  - Select the form that matches the Type of Document you are importing. Selecting the correct forms category is essential, this organizes the document and allows other to retrieve for future viewing.

- **F) Form**
  - Click the import Button to begin importing the document. **Recommended document formats**: PDF, TXT, DOC, DOCX
Importing into Avatar

- Once the import is complete, the document will display
Importing into Avatar

BEFORE YOU SAVE THE DOCUMENT IN AVATAR, YOU MUST VERIFY THE FOLLOWING:

Verify:
- Document(s) are readable
- All pages in the document are scanned
- Documents are imported to the correct client (check client id, name and birth date)
- An episode was selected for required for Client Treatment Plans
- The correct form title was selected for the document imported under “Document Description”
- The document is appropriately signed
- The origination date is correct under “Document date”

Once the document has been verified, Select, Save File to Avatar. If there is an error, Select, Close Document and re-import again.
## Auditing Documents

### Check List before importing in Avatar

<table>
<thead>
<tr>
<th>Condition</th>
<th>Status</th>
</tr>
</thead>
<tbody>
<tr>
<td>CLIENT ID UNDER THE “CLIENT ID” COLUMN</td>
<td></td>
</tr>
<tr>
<td>THE CLIENT NAME UNDER THE “CLIENT NAME ” COLUMN</td>
<td></td>
</tr>
<tr>
<td>AN EPISODE NUMBER IS LISTED UNDER THE “EPISODE” COLUMN IF DOCUMENT is CLIENT TREATMENT PLAN</td>
<td></td>
</tr>
<tr>
<td>THE CORRECT FORM TITLE WAS SELECTED UNDER THE “DOCUMENT DESCRIPTION” COLUMN</td>
<td></td>
</tr>
<tr>
<td>THE ORIGINATION DATE IS CORRECT UNDER THE “DOCUMENT DATE” COLUMN</td>
<td></td>
</tr>
<tr>
<td>DOCUMENTS ARE COMPLETE</td>
<td></td>
</tr>
<tr>
<td>SIGNATURES ARE NOT MISSING</td>
<td></td>
</tr>
<tr>
<td>SIGNATURES ARE LEGIBLE</td>
<td></td>
</tr>
<tr>
<td>ORIGINATION DATES ARE NOT MISSING</td>
<td></td>
</tr>
<tr>
<td>IMPORTED DOCUMENT FILES CAN BE OPENED AND VIEWED</td>
<td></td>
</tr>
<tr>
<td>DOCUMENTS SCANNED ARE FOR THE CLIENT YOU ARE REVIEWING</td>
<td></td>
</tr>
<tr>
<td>SCANNED DOCUMENTS ARE NOT DUPLICATED</td>
<td></td>
</tr>
</tbody>
</table>
Viewing Documents in Avatar

View imported documents through Chart View.

Search and select the client, double click to open chart view.
Viewing Documents

Click on document name to view

Multiple Episodes

Client Name

Episode

Doc Desc.

Doc. Date

Doc. Status

Form Name

User
Viewing Documents

Check box to View or Print

At bottom of page click View, document will load

Document opens

You have the option to Print or Close All Documents

Close All Documents takes you back the original form you chose.
Questions?
Thank you