DIAGNOSIS (ADMISSION) & UPDATE, CONTRACTOR TX PLAN (INCLUDES ASSESSMENT DATE & CONSENT TO TREATMENT DATE),CSI ADMISSION,LOCUS & CALOCUS,

Friday, October 24, 2014 2:00 – 3:30 PM

PRESENTER:

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The question: If a Contracted Agency is a Client's Care Coordinator, how and where is this done in Avatar?

Answer: If a Contracted Agency is the Care Coordinator, the assignment of a Care Coordinator must be done by MIS.

Currently Avatar has a form where the CC is assigned. In order for a Contracted Agency to have access to this form;

1.   QM/MIS must approve that Contractors will be given this access.

2.   QM must write Protocols on what the process will be.

3.   QM must approve the Agency
4.   Training must be provided to Agency before given access to the from.

FOLLOW UP QUESTIONS FROM 10/15

The question: What termination reason should an Agency use to discharge a client if they go AWOL?

Answer: If a client goes AWOL from a program, and is terminated in Avatar, the termination Program can use Other as the reason and explain in the discharge comments section.

Administrative Discharge is used in the AOD Programs not MH.

Diagnosis (Admission)

WHEN IS THE FORM USED?

The Diagnosis is entered at **Admission**, **Discharge** and should be **Updated** if the Diagnosis changes after admission.

DIAGNOSIS (ADMISSION)

Entering an initial diagnosis: Menu Path >Avatar PM > Client Management > Client Information >Diagnosis or

Select from Forms & Data >My Forms
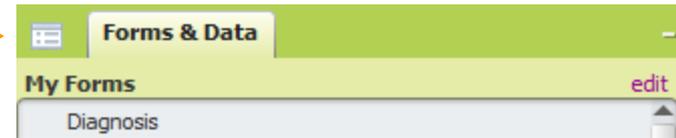
Select Client screen, enter the client ID in the Client Name/ID field, click the **Search** button, and select the corresponding entry.
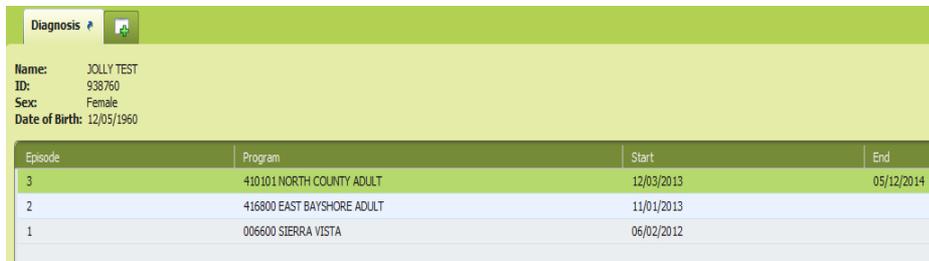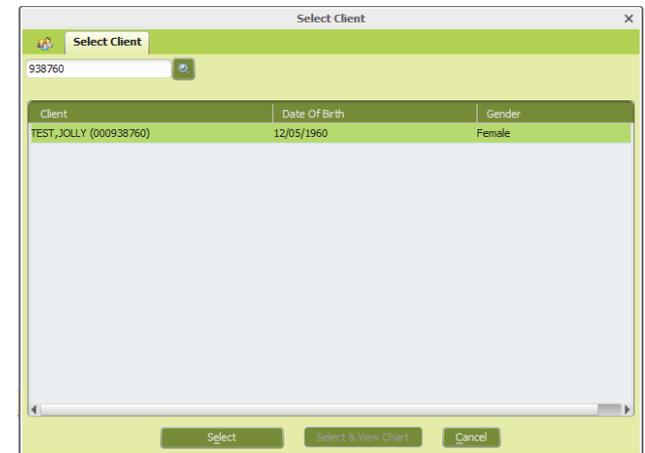
The Episode Selection pre-display shows if the client has multiple episodes.
Select an episode, click OK.

DIAGNOSIS (ADMISSION)

1. In the Type Of Diagnosis field (Admission)

2. Selecting Admission or Discharge populates the client's admission or discharge date in the Date of Diagnosis field.

3. In the Time Of Diagnosis field, enter the diagnosis time.

4. In the Diagnosis Axis I field, enter diagnosis Axis I using DSM-IV codes .

5. In the Principal Diagnosis field, select the diagnosis using the chevron (▼). Diagnoses codes entered in Axis II fields can be selected.

6. Select "Submit" to save the form.

DIAGNOSIS (ADMISSION)

New fields: There a few new fields on the Diagnosis Form can be seen but are <u>currently not in use.</u>   These new fields are part of the upgrade to ICD 10 and Meaningful Use. Once we begin to use them users will be notified and trained on their usage.

Diagnosis Update & Discharge

DIAGNOSIS (UPDATE)

Select from Forms & Data >My Forms

Select Client screen, enter the client ID in the Client Name/ID field, click the **Select** button
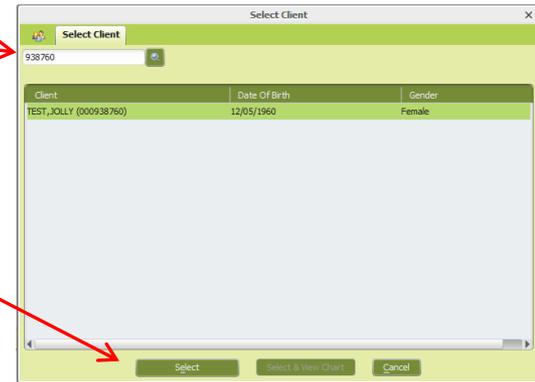
The Diagnosis pre-display shows if the client has multiple entries.
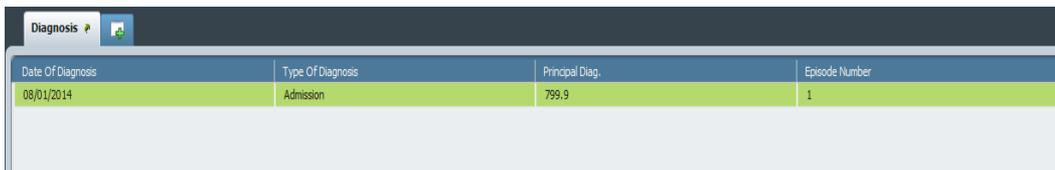
Select Add

DIAGNOSIS (UPDATE)

1. In the Type Of Diagnosis field (Update) , select the diagnosis is associated with the client.

2. Selecting Admission or Discharge populates the client's admission or discharge date in the Date of Diagnosis field.

3. In the Time Of Diagnosis field, enter the diagnosis time.

4. In the Diagnosis Axis I field, enter diagnosis Axis I DSM-IV codes.

5. In the Principal Diagnosis field, select the diagnosis using the chevron (▼). Diagnoses codes entered in Axis II fields can be selected.

6. Select "Submit" to save the form.

Contractor Treatment Plan
(Includes Entering the Assessment Date & Consent to Treatment Date)

CONTRACTOR TREATMENT PLAN

Select from **Forms & Data** >My Forms
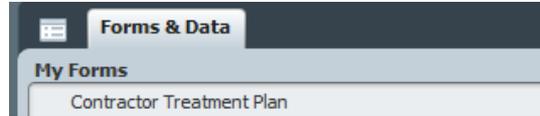
Select Client screen, enter the client ID in the Client Name/ID field, click the **Select** button
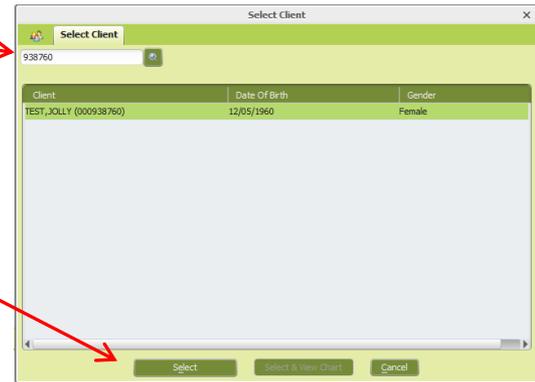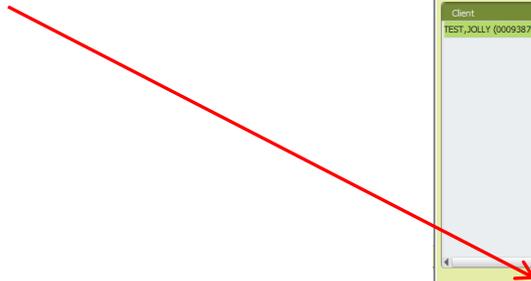
The **Contractor Treatment Plan** form has **2 sections**

1. Contractor Treatment Plan

2. Client Overall Goal
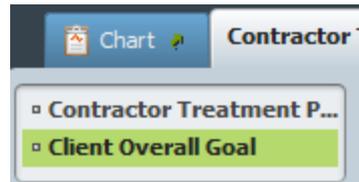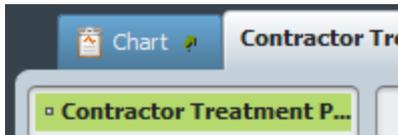
CONTRACTOR TREATMENT PLAN

1. **Plan Name** , (*Naming convention = Client's preferred Name, Type of Plan & Year*)
   (Sammy's Annual Plan 2014)

2. **Plan Type** (Annual Plan, Initial Plan, Update Plan)

3. **Plan Start Date** (date of clinician signature).

4. **Plan End Date** (auto populates once the Plan Start is entered)

5. **Treatment Plan Status** (Draft, Final, Pending Approval)

CONTRACTOR TREATMENT PLAN

6. Type the (Client's Overall Goal – listed on paper Treatment Plan)

Client's Overall Goal
Sammy wants to be less depressed and angry

7. Entered by (auto populates & is based on user login)

Entered by
HERRING,A (000032)

8. Clinical Staff Responsible

Clinical Staff Responsible
BULL,INGALL (060050)

9. Select, Add – The goal disappears (not to worry)

Client's Overall Goal
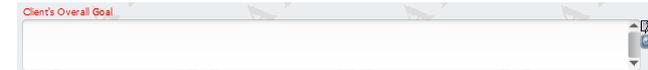
10. Use **chevron** to select the goal

Add   Delete
Select Client's Overal Goal To Edit
Sammy wants to be less depressed and angry

Sammy wants to be less depressed and angry
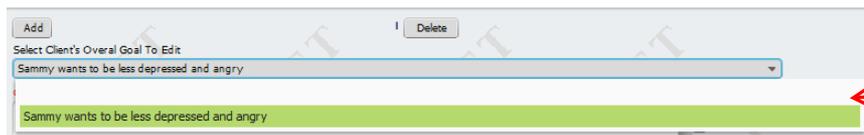
it appears in green on the dropdown list

11. Return to Contractor Treatment Plan Section

Chart   Contractor Tre

□ Contractor Treatment P...

ENTERING ASSESSMENT DATE & CONSENT TO TREATMENT DATE

Contractors who are also the Client's Care Coordinator should include the date when the client Assessment was completed

In the Documentation Compliance section

Documentation Compliance

Assessment Date

12. Enter date the Assessment was done

Consent To Treatment Date

13. Enter Consent To Treatment Date

TREATMENT PLAN COMPLETION

14.   If everything is complete, you can now change the status from Draft to **Final** (the (Draft watermark disappears)

❖ You can submit the form in Draft status if changes need to be made later.

Forms left in Draft status will not be counted as having a up-to-date Tx Plan and services billed will not eligible to be paid.
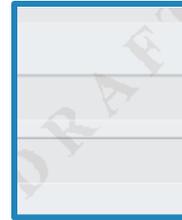
This Treatment Plan is for CONTRACTOR ENTRY ONLY

Plan Name
Sammy's Annual Plan

Plan Type
Annual Plan

Plan Dates

Plan Start Date (date of clinician signature)
10/13/2014   T   Y

Plan End Date
08/01/2015

Treatment Plan Status
○ Draft
● Final

○ Pending Approval

Team Member To Notify

15.   Click **Submit to save**

Submit

CSI ADMISSION

CSI ADMISSION

The CSI Admission form is part of the Admission Bundle (OUTPATIENT) or can be accessed from Forms & Data> My Forms or by Search Forms or
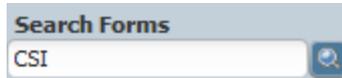
1. **Birth Name (Last)**
2. **Birth Name (First)**
3. Birth Name (Middle)
4. Birth Name (Suffix)
5. **Mother's First Name**
6. **Fiscally Responsible County**
7. Place of Birth – County
8. Place of Birth – State
9. Place of Birth -Country

Once County is put in State and County auto populate

CSI ADMISSION

10. Ethnicity
11. Primary Language
12. Conservatorship/Court Status

CSI Ethnicity
- ● Not Hispanic or Latino
- ○ Unknown / Not Reported
- ○ Hispanic or Latino

Primary Language
English ▼

Conservatorship/Court Status
- ○ Temporary Conservatorship
- ○ Lanterman-Petris-Short
- ○ Murphy
- ○ Probate
- ○ PC 2974
- ○ Representative Payee Without Conservatorship
- ○ Juvenile Court, Dependent of the Court
- ○ Juvenile Court, Ward – Status Offender
- ○ Juvenile Court, Ward – Juvenile Offender
- ● Not Applicable
- ○ Unknown/Not Reported

Race (Select Up To Five)
- ☐ American Indian or Alaska Native
- ☑ Asian Indian
- ☑ Black or African American
- ☐ Cambodian
- ☐ Chinese

Special Population
- ○ (AB 3632) Individualized education plan (IEP) required service(s)
- ● No special population services

County School ▼

Number of children less than 18 years of age that the client cares for / is responsible for at least 50% of the time
0

Number of dependent adults 18 years of age and above that the client c for / is responsible for at least 50% of the time
0

13. Race (Select up to 5)
14. Special Population - If client is a child then County School should be selected from the drop down box.
15.   Number of children less than 18 client is responsible at least 50% of time
16.   Number of dependent adults client is responsible at least 50% of time

CSI ADMISSION

This section is for inpatient (ONLY)

Light bulbs contain information about a particular field

Birth date carried over from Opening

Click **Submit** to save

Questions?

CONTRACTOR LOCUS & CALOCUS ENTRY

CONTRACTOR LOCUS ENTRY

The **Contractor LOCUS & CALOCUS Entry** forms or can be accessed from **Forms & Data**> My Forms or by Search Forms or [Avatar CWS/Contractor Document Entry](#)

The **Contractor LOCUS & CALOCUS Entry** forms have **2 sections**

1. LOCUS Scores
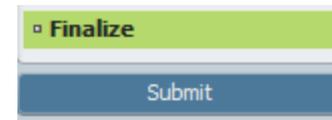
2. Finalize

CONTRACTOR LOCUS ENTRY

LOCUS Scores Section

1. **Risk of Harm**
2. **Functional Status**
3. **Medical, Addictive and Psychiatric Co-Morbidity**
4a. **Recovery Environment – Stressors**
4b. **Recovery Environment – Support**
5. **Treatment and Recovery History**
6. **Engagement**

CONTRACTOR LOCUS ENTRY

Click, Calculate LOCUS Score

Calculate LOCUS Score

A crystal report will be generated showing the score

Once the score is shown, close by clicking on

Calc Locus Score.rpt

Preview

BusinessObjects

LOCUS score is : 9

Please enter this score in Total Score in LOCUS Option
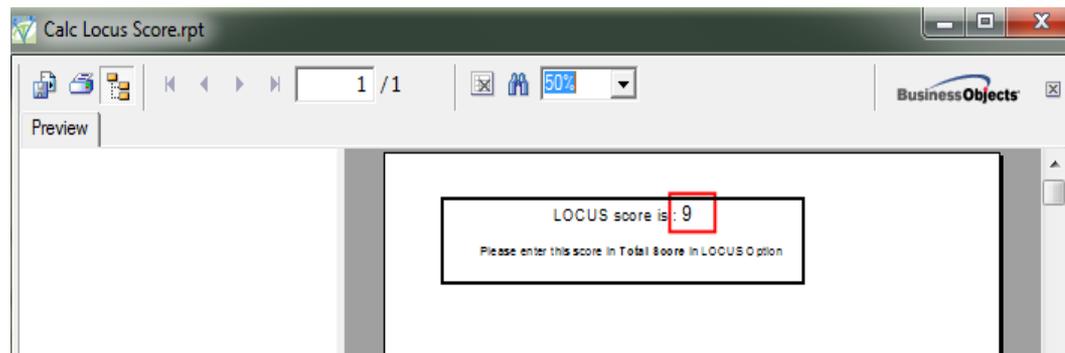
Place the score in the Total Score field

Total Score   9

CONTRACTOR LOCUS ENTRY

Go to the **Finalize** Section

Input Practitioner Name

Select Draft/Pending/Final Status

Selecting Final prevent edits

Click **Submit to save**

CONTRACTOR CALOCUS ENTRY (FOR YOUTH)

LOCUS Scores Section

1. **Risk of Harm**
2. **Functional Impairment**
3. **Co-morbidity**
4a. **Recovery Environment – Stressors**
4b. **Recovery Environment – Support**
5. **Resiliency and Treatment History**
6a. **Treatment, Acceptance Engagement – Child/Adolescent***
6b. **Treatment, Acceptance Engagement – Parent/Care-taker***

CONTRACTOR CALOCUS ENTRY

Click, Calculate LOCUS Score   Calculate LOCUS Score

A crystal report will be generated showing the score

Once the score is shown, close by clicking on ✕

Calc Locus Score.rpt

Preview

1 /1   50%   BusinessObjects

LOCUS score is : 9

Please enter this score in Total Score in LOCUS Option

Place the score in the Total Score field

I Total Score   9

CONTRACTOR CALOCUS ENTRY

Go to the **Finalize** Section

Send to (for Pending Approval only)

Select Draft/Pending/Final Status
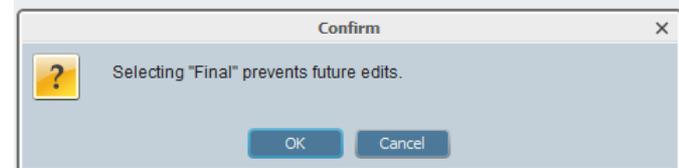
Selecting Final prevent edits

Click **Submit to save**
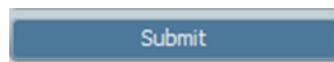
Questions?

Thank you for attending

Last Webinar – Reports & Scanning
October 30, 2014 10:30-12:00 pm