

**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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FOLLOW UP QUESTIONS FROM 10/15

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 form.

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?

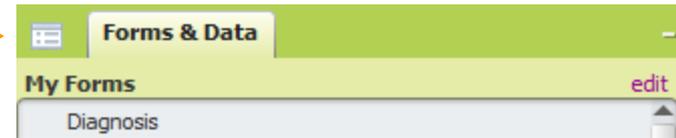
The Diagnosis is entered at Admission, Discharge and should be Updated if the Diagnosis changes after admission.



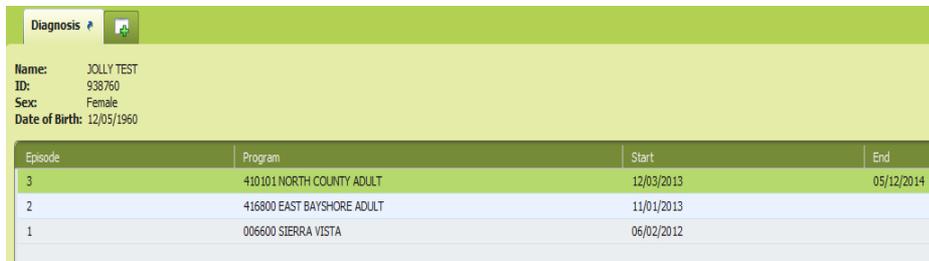
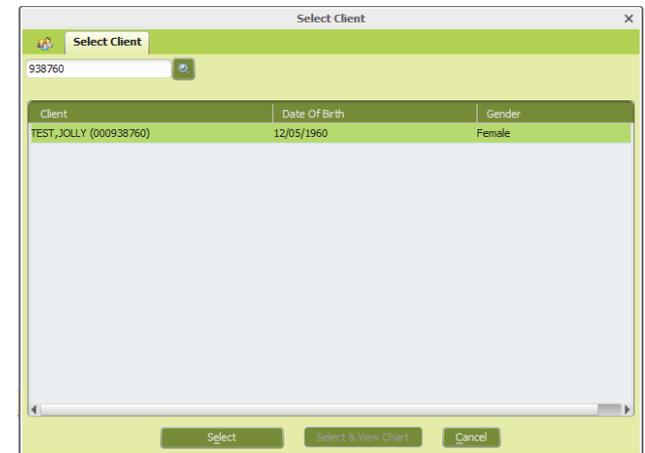
DIAGNOSIS (ADMISSION)

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.



A screenshot of the 'Diagnosis' screen. It shows client details: Name: JOLLY TEST, ID: 938760, Sex: Female, Date of Birth: 12/05/1960. Below is a table with columns 'Episode', 'Program', 'Start', and 'End'.

Episode	Program	Start	End
3	410101 NORTH COUNTY ADULT	12/03/2013	05/12/2014
2	416800 EAST BAYSHORE ADULT	11/01/2013	
1	006600 SIERRA VISTA	06/02/2012	

The Episode Selection pre-display shows if the client has multiple episodes.
Select an episode, click **OK**.



DIAGNOSIS (ADMISSION)

The screenshot shows a medical diagnosis form with the following fields and callouts:

- 1**: Type Of Diagnosis field, with "Admission" selected.
- 2**: Date Of Diagnosis field, showing "03/06/2013".
- 3**: Time Of Diagnosis field, showing "06:41 PM".
- 4**: Diagnosis - Axis I - 1 field, containing "295.63 (ICD9) SCHIZOPHRENIC DISORDERS, RESIDUAL TYPE SUBC".
- 5**: Principal Diagnosis dropdown menu, showing "(295,63) (ICD9) SCHIZOPHRENIC DISORDERS, RESIDUAL TYPE SUBC". A red arrow points to this dropdown.
- 6**: Diagnosing Practitioner dropdown menu, showing "BULL.INGALL (060050)".

Other fields include: Diagnosis - Axis II - 2 (301.84 (ICD9) PASSIVE AGGRESSIVE PERSONALITY), Diagnosis - Axis II - 3, and General Medical Condition Summary Code (CSI) with a list of conditions: Allergies, Anemia, Arterial Sclerotic Disease, Arthritis, and Asthma.

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 are a few new fields on the Diagnosis Form that can be seen but are currently not in use. 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.

The screenshot displays several sections of the Diagnosis Form with red boxes highlighting new fields:

- General Medical Condition Summary Code (CSI):** A list of conditions with checkboxes: Allergies, Anemia, Arterial Sclerotic Disease, Arthritis, and Asthma.
- Axis IV: Primary Support Group:** Radio buttons for Yes and No.
- Axis IV: Social Environment:** Radio buttons for Yes and No.
- Axis IV: Educational:** Radio buttons for Yes and No.
- Axis IV: Occupational:** Radio buttons for Yes and No.
- Axis IV: Housing:** Radio buttons for Yes and No.
- Axis IV: Economic:** Radio buttons for Yes and No.
- Axis IV: Health Care Services:** Radio buttons for Yes and No.
- Axis IV: Legal System/Crime:** Radio buttons for Yes and No.
- Axis IV: Other Problems:** Radio buttons for Yes and No.
- Diagnosis - Axis V Current GAF Rating:** A dropdown menu.
- Trauma (CSI):** Radio buttons for Yes, No, and Unknown.
- Substance Abuse / Dependence (CSI):** Radio buttons for Yes, No, and Unknown / Not Reported.
- Substance Abuse / Dependence Diagnosis (CSI):** A dropdown menu.
- Diagnosis - Axis III - 1, 2, 3:** Three dropdown menus.
- Prognosis:** A section containing:
 - GAF - Lowest Level Last 12 Months: A dropdown menu.
 - Estimated Discharge Date: A date picker with T, Y, and M buttons.
 - GAF - Highest Level Last 12 Months: A dropdown menu.



Diagnosis Update & Discharge

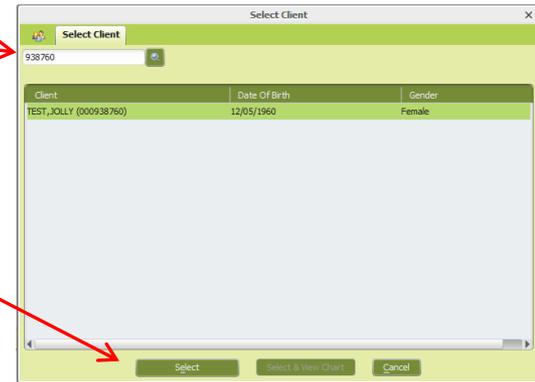


DIAGNOSIS (UPDATE)

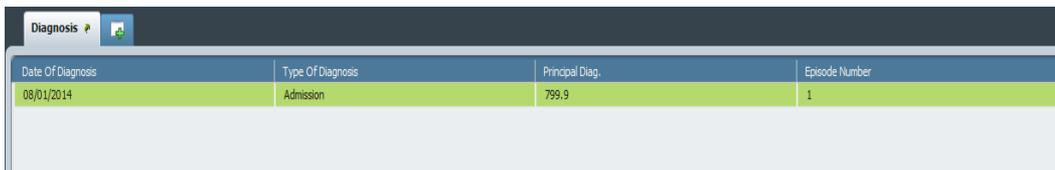
Select from Forms & Data > My Forms



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.



A screenshot of a 'Diagnosis' pre-display table. The table has four columns: 'Date Of Diagnosis', 'Type Of Diagnosis', 'Principal Diag.', and 'Episode Number'. It contains one row of data.

Date Of Diagnosis	Type Of Diagnosis	Principal Diag.	Episode Number
08/01/2014	Admission	799.9	1

Select **Add**



DIAGNOSIS (UPDATE)

The screenshot shows a medical software interface for entering a diagnosis. The form is titled "Diagnosis" and has a "Submit" button. The "Type Of Diagnosis" field is set to "Update". The "Date Of Diagnosis" field is set to "10/10/2014". The "Time Of Diagnosis" field is set to "11:36 AM". The "Diagnosis - Axis I - 1" field contains the code "296.23 MAJOR DEPRESSIVE DISOR DER, SINGLE EPISODE, SEVERE WI". The "Principal Diagnosis" field is set to "(296.23) MAJOR DEPRESSIVE DISORDER, SINGLE EPISODE, SEVERE V". The "Diagnosing Practitioner" field is set to "INGALL BULL (060050)". The form also includes fields for "Diagnosis - Axis II - 2", "Diagnosis - Axis II - 3", "Diagnosis - Axis I - 2", "Diagnosis - Axis I - 3", and "Diagnosis - Axis II - 1". A "General Medical Condition Summary Code (CSI)" section is also visible with checkboxes for Allergies, Anemia, Arterial Sclerotic Disease, Arthritis, and Asthma.

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.



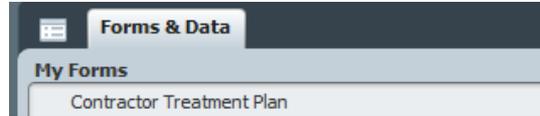
Contractor Treatment Plan

**(Includes Entering the Assessment
Date & Consent to Treatment Date)**

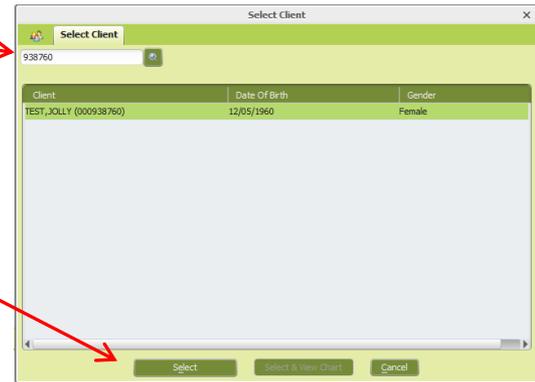
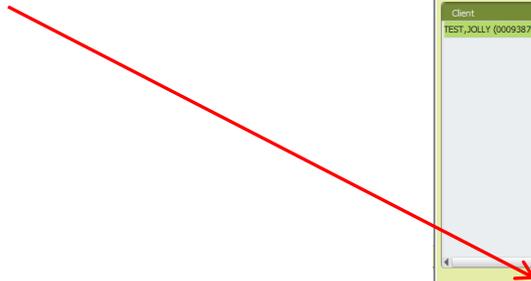


CONTRACTOR TREATMENT PLAN

Select from Forms & Data > My Forms



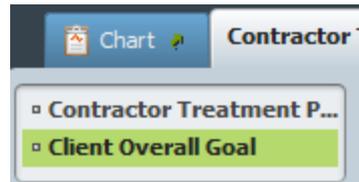
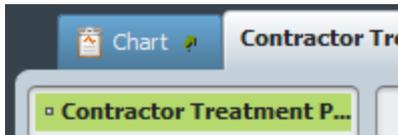
Select Client screen, enter the client ID in the Client Name/ID field, click the **Select** button



The Contractor Treatment Plan form has 2 sections

1. Contractor Treatment Plan

2. Client Overall Goal



CONTRACTOR TREATMENT PLAN

This Treatment Plan is for CONTRACTOR ENTRY ONLY

Plan Name
Sammy's Annual Plan 2014 1

Plan Dates

Plan Start Date (date of clinician signature)
10/13/2014 3

Plan End Date
08/01/2015 4

Plan Type 2 Initial Plan

Treatment Plan Status 5

Draft Pending Approval Final

Team Member To Notify

Red=Required fields

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)



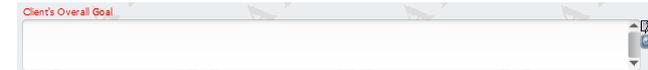
7. Entered by (auto populates & is based on user login)



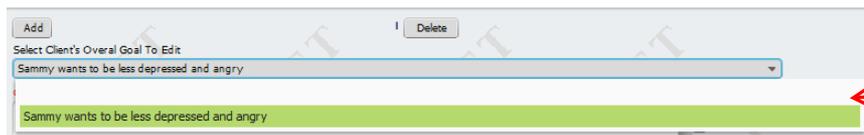
8. Clinical Staff Responsible



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



10. Use chevron to select the goal



it appears in green on the dropdown list

11. Return to Contractor Treatment Plan Section



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

The screenshot shows a form titled "Documentation Compliance" with two sections. The first section is "Assessment Date" and the second is "Consent To Treatment Date". Each section has a text input field, a "T" button, a "Y" button, and a date picker icon. A red arrow points from the text "12. Enter date the Assessment was done" to the date picker icon in the "Assessment Date" section. Another red arrow points from the text "13. Enter Consent To Treatment Date" to the text input field in the "Consent To Treatment Date" section.

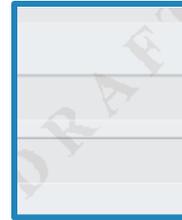
12. Enter date the Assessment was done

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)



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 [calendar icon]

Plan End Date
08/01/2015

Treatment Plan Status
 Draft
 Final
 Pending Approval

Team Member To Notify [dropdown menu]



❖ 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.

15. Click **Submit** to save

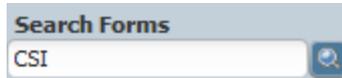


CSI ADMISSION



CSI ADMISSION

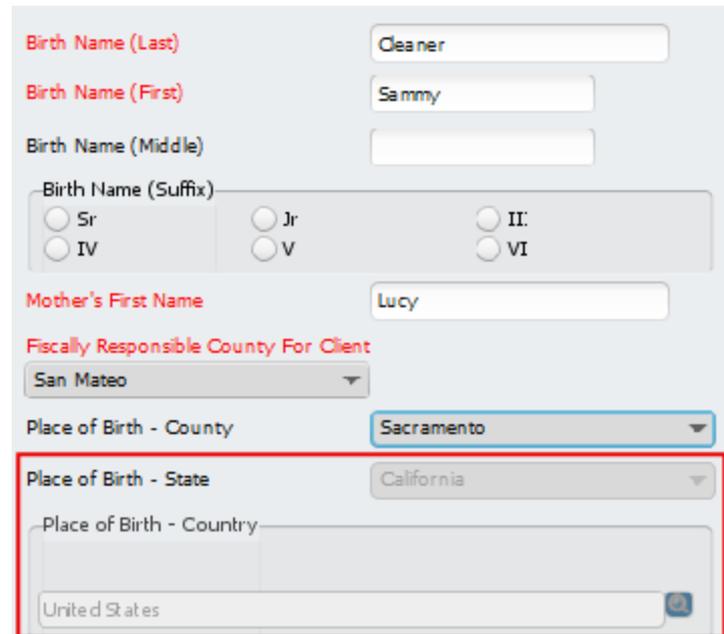
The CSI Admission form is part of the Admission Bundle (OUTPATIENT) or can be accessed from Forms & Data> My Forms or by Search Forms or



Search Forms
CSI

Name	Menu Path
CSI Admission	Avatar PM / Client Management / Client Information

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



Birth Name (Last) Cleaner

Birth Name (First) Sammy

Birth Name (Middle)

Birth Name (Suffix)

Sr Jr II
 IV V VI

Mother's First Name Lucy

Fiscally Responsible County For Client
San Mateo

Place of Birth - County Sacramento

Place of Birth - State California

Place of Birth - Country
United States

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 cares 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

Legal Class (Inpatient ONLY)

Admission Necessity Code (Inpatient ONLY)

Emergency

Planned (Prior Authorization)

Unknown/Not Reported

This section is for inpatient (ONLY)

Year Or Month/Year Of Birth

06/1989



Light bulbs contain information about a particular field

Birth date carried over from Opening

Year Or Month/Year Of Birth 

CSI Data Dictionary "C-03.0 Date Of Birth" When the complete date of birth is unknown, as much of the date as is known s... Click

Click Submit to save

Submit



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](#)

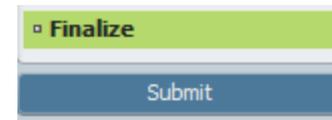
The Contractor LOCUS & CALOCUS Entry forms have 2 sections

1. LOCUS Scores



A screenshot of a web form section. It features a green header bar with the text "LOCUS Scores" and a white bar below it with the text "Finalize". At the bottom of the section is a blue button labeled "Submit".

2. Finalize



A screenshot of a web form section. It features a green header bar with the text "Finalize" and a blue button labeled "Submit" below it.

CONTRACTOR LOCUS ENTRY

LOCUS Scores Section

LOCUS Scores
 Finalize

Submit

Date Assessed
10/15/2014

#1 - Risk of Harm
 1-Minimal Risk 2-Low risk 3-Moderate Risk 4-Serious risk 5-Extreme Risk

#2 - Functional Status
 1-Minimal 2-Mild 3-Moderate 4-Serious 5-Severe

#3 - Medical, Addictive and Psychiatric Co-Morbidity
 1-None 2-Minor 3-Significant 4-Major 5-Severe

#4a - Recovery Environment - Environmental Stressors
 1-Low Stress 2-Mildly 3-Moderately 4-Highly 5-Extremely Stressful

#4b - Recovery Environment - Environmental Support
 1-Highly Supportive 2-Supportive 3-Limited 4-Minimal 5-No Support

#5 - Treatment and Recovery History
 1-Fully 2-Significant 3-Moderate/Equivocal 4-Poor 5-Negligible

#6 - Engagement
 1-Optimal 2-Positive 3-Limited 4-Minimal 5-Unengaged

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

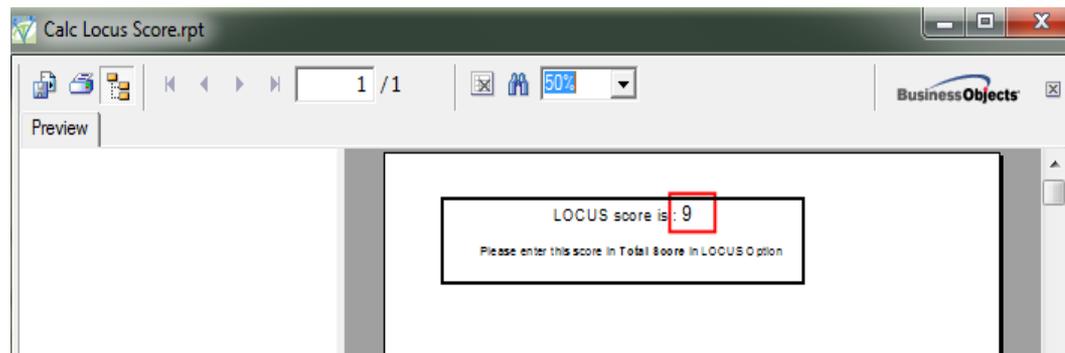


CONTRACTOR LOCUS ENTRY

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 **close**

Place the score in the **Total Score** field

Total Score

CONTRACTOR LOCUS ENTRY

Go to the Finalize Section

A green button labeled 'Finalize' and a blue button labeled 'Submit' stacked vertically.

Input Practitioner Name

A text input field with a red border containing the text 'BULL, INGALL (060050)'. Below it is a dropdown menu labeled 'Send To (for Pending Approval only)' and a text area labeled 'Send To (for Pending Approval only) Outgoing Comments'.

Select Draft/Pending/Final Status

Radio buttons for 'Draft/Pending Approval/Final'. The 'Final' option is selected with a green dot.

Selecting Final prevent edits

A 'Confirm' dialog box with a question mark icon and the text 'Selecting "Final" prevents future edits.' with 'OK' and 'Cancel' buttons.

Click Submit to save

A blue button labeled 'Submit'.

CONTRACTOR CALOCUS ENTRY (FOR YOUTH)

LOCUS Scores Section

LOCUS Scores
 Finalize

Date Assessed

Is Youth Emancipated

Date Assessed: 09/09/2014

Is Youth Emancipated? Yes No

#1 - Risk of Harm
 1-Low Risk 2-Some Risk 3-Significant Risk 4-Serious Risk 5-Extreme Risk

#2 - Functional Impairment
 1-Minimal 2-Mild 3-Moderate 4-Serious 5-Severe

#3 - Co-morbidity
 1-None 2-Minor 3-Significant 4-Major 5-Severe

#4a - Recovery Environment -Environmental Stressors
 1-Minimally Stressful 2-Mildly 3-Moderately 4-Highly 5-Extremely Stressful

#4b - Recovery Environment -Environmental Support
 1-Highly Supportive 2-Supportive 3-Limited 4-Minimally 5-No Support

#5 - Resiliency and Treatment History
 1-Full 2-Significant 3-Moderate/Equivocal 4-Poor 5-Negligible

#6a - Treatment, Acceptance Engagement -Child/ Adolescent*
 1-Optimal 2-Constructive 3-Obstructive 4-Adversarial 5-Inaccessible

#6b - Treatment, Acceptance Engagement -Parent/Care-taker*
 0-N/A 1-Optimal 2-Constructive
 3-Obstructive 4-Adversarial 5-Inaccessible

Calculate CALOCUS Score Total Score

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*

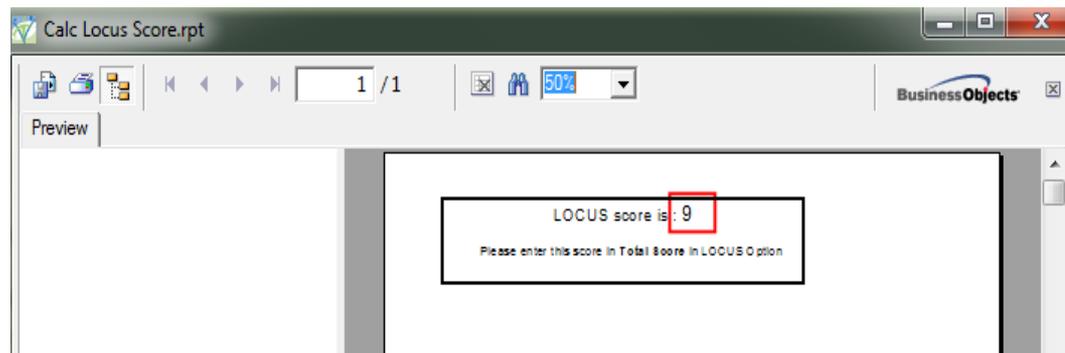


CONTRACTOR CALOCUS ENTRY

Click, Calculate LOCUS Score

Calculate LOCUS Score

A crystal report will be generated showing the score



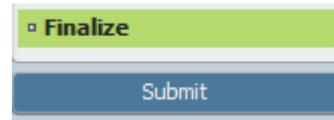
Once the score is shown, close by clicking on **close**

Place the score in the **Total Score** field

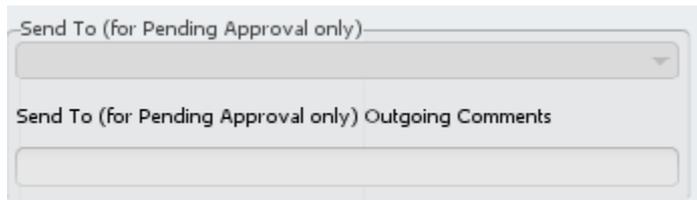
Total Score

CONTRACTOR CALOCUS ENTRY

Go to the Finalize Section

A UI element with a green header bar containing the text 'Finalize' and a blue button below it labeled 'Submit'.

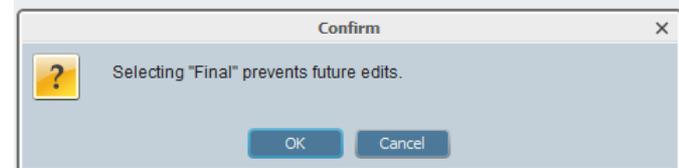
Send to (for Pending Approval only)

A dropdown menu with the text 'Send To (for Pending Approval only)' above it. Below the dropdown is a label 'Send To (for Pending Approval only) Outgoing Comments' and an empty text input field.

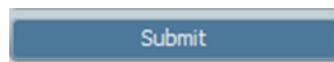
Select Draft/Pending/Final Status

A UI element with the text 'Draft/Pending Approval/Final' above three radio buttons. The 'Final' radio button is selected, indicated by a green dot.

Selecting Final prevent edits

A dialog box titled 'Confirm' with a close button 'X' in the top right. It contains a yellow question mark icon and the text 'Selecting "Final" prevents future edits.' Below the text are two buttons: 'OK' and 'Cancel'.

Click Submit to save

A blue button with the text 'Submit' centered on it.

Questions?

Thank you for attending

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

