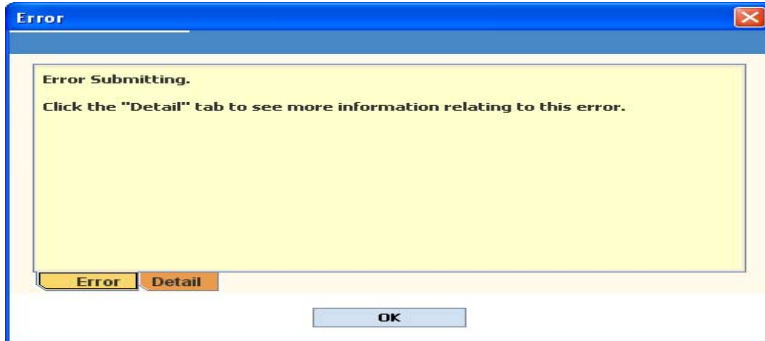


Subject: IMPORTANT – SEE NEWEST UPDATES RE: NEW ADULT ASSESSMENTS LIVE IN AVATAR MARCH 18TH

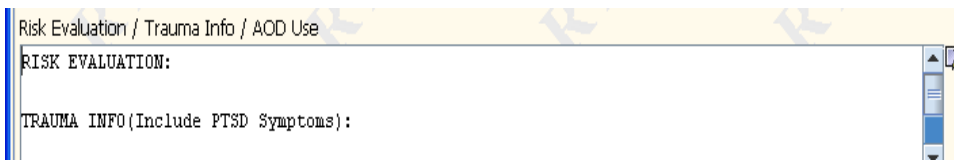
Adult Unit Chiefs: Please make sure staff watch the video located at:
<http://www.smchealth.org/avatarguides>

Newest Updates:

1. Staff may receive the following error message when they submit the new adult assessments. Just click OK, the assessment will be saved, this is a Netsmart error and has been reported.



- 2. A 3rd Axis I Diagnosis box** has been added to both assessments.
- 3. Physician Supplemental Info** has been added as a Type of Initial Assessment. This does not count as a complete assessment but allows for additions to the PIN (see page 2 of this document).
- 4. A Risk Evaluation template** was added if the user right clicks in Risk Assessment Text Box



What is NEW starting Monday, March 18th?

- The new Adult Initial Assessment and Annual/Assessment Update are shorter and less cumbersome! Now the Initial is only 8 tabs and a total of 13 pages! The Annual/Update is only 7 tabs and 8 pages!
- Physicians will now use these forms, replacing the PIN!
- These forms now **INCLUDE** the *MSE*, *LOCUS* and *Diagnosis* into the document, there is no Bundle and no linking the assessment documents to finalize!
- Paper Worksheets for the *NEW* Initial and Annual/Update Assessments are available for assessments done in the field. "Paper" Assessments need to be completed in Avatar, and then shredded.

This notice outlines changes **ONLY** to the **ADULT Initial Assessment** and **ADULT Annual/Update Assessment**. (Pre-to-3, Child/Youth, and Adolescent providers will continue to use the current youth assessment forms).

Please Note: A group of your peers were selected to test the new assessment forms beginning 3/1/13.

When Do We Begin to Use the NEW forms?

- Beginning Monday March 18, 2013, the new assessment forms will be available in Avatar.
- The Adult Initial Assessment is located at Avatar CWS→ Assessments→ Adult Initial Assessment v2.

3. The Adult Annual/Update Assessment is located at Avatar CWS→ Assessments → Adult Annual/Update Assessment v2.
4. You will begin to use the forms on this date for any **new** or **annual assessment** that is due or for **any update to an assessment that currently exists**.
5. The current assessment forms will remain in the Avatar CWS menu for any assessments in progress, in draft, awaiting co-signature or which must be done within the next few days. The current assessment forms will be removed from Avatar by May 1, 2013.

What if I have Questions about the NEW forms?

1. Please watch the video!
2. Please read the **updated** “About the New Adult Assessments”.
3. Please let BHRS QM know if you would like to participate in a Webinar.

Please send an e-mail to Michele Friedman, mfriedman@smcgov.org or call (650) 573-2668 if you are interested. Michele will send you information if a webinar is scheduled.

ADULT INITIAL ASSESSMENT:

Where to find the **new** Adult Initial Assessment, this is the path: Go to Avatar CWS→ Assessments→ Adult Initial Assessment v2

Highlights of changes:

Assessment Type -

Select the *Type of Assessment* –

- **Initial Assessment** if the assessment is by a clinician/case manager ONLY.
- **Multidisc. Assessment** if the assessment includes contributions from multidisciplines for example a clinician **and** an MD.
- **Physician Initial Eval** if the full initial assessment is performed by MD/NP- ONLY.
- **Physician Supplemental Info** will not count as a complete initial assessment but is used if the physician is adding specific information to a PIN and wants to clearly identify that he/she authored the addition. The requirement of most fields will be disabled. (Only Diagnosis & Clinical Formulation/Medical Necessity are required)

Service Strategies - This indicates services to be employed over the year, this field was moved to the Assessments from the Treatment Plan to reduce duplication of work (see light bulb for help).

Diagnosis – Page 1 allows for **three** diagnoses and a substance abuse diagnosis on Axis I and two diagnoses on Axis II. Enter any additional diagnoses in the **Diagnosis Comments** text box on Page 2 of this Tab.

The Primary Diagnosis automatically fills in; do not change unless the Primary Diagnosis is an Axis II Diagnosis.

ADULT ANNUAL/UPDATE ASSESSMENT:

Where to find the **new** Adult Annual/Update Assessment, this is the path: Go to Avatar CWS→ Assessments → Adult Annual/Update Assessment v2.

Highlights of some of the changes:

MOST IMPORTANT: Select Assessment Type FIRST!

When you select **Annual**, required fields will become red on all pages and tabs.

When you select **Update**, you are able to complete only the fields that you are updating.



WARNING: Do NOT enter information *first* before you select **Update** as the Assessment Type. Otherwise, ALL information except the Diagnosis will get **erased!**

For ANNUAL:

- Use Annual as requirement per regulation; the LOCUS, MSE and Diagnosis are now included in this form.
- The Annual Assessment will pull forward information from the **last** set of data, regardless of which assessment form was used (Old or New see below).
- Must enter the Annual Assessment Date, Source of Info.
- LOCUS, MSE and Clinical Formulation **will not** pull forward- must complete.
- The Diagnosis and Original Date/Time of Diagnosis will be pulled forward. If you need to make changes to any diagnosis field, manually enter the date/time for the change.

For UPDATE:

- Use **Update** to add additional information midyear, to change the diagnosis, to change the LOCUS and/or to update a specific field.
- MD can use Update to paste in adjunct PIN, but must fill in the date/type of assessment and source of information.
- If significant information needs to be added and/or corrected, it is best to complete an Annual or Initial Assessment.

For Both Initial and Annual/Update Assessments

Saving the Assessment -

Draft Save:

- If you *do not require a co-signature* on the assessment, you can save the document as a draft once you complete the **Type** and **Date of the Assessment**.
- If you *require a co-signature*, complete the **Type** and **Date of the Assessment**, **Send To** and **Send To Outgoing Comments** to save as Draft. The assessment will not be sent to your supervisor until you save as Pending!

Final Save:

- If you *do not require a co-signature* on the assessment, submit the assessment as **Final**.
- If you *require a co-signature*, send **Pending Approval**. Your supervisor may either approve or return the document as Draft for you to make corrections.

Ways to Show Which Member of the Team Completed Components of the Assessment:

Staff Selection Identifier

For any of the Text Box fields, if you right click inside the text box you are able to select *System Template* → **Staff Selection Identifier** - this will insert **your name** into the field. (This helps to distinguish a contributing clinician completing that specific area of the assessment). **A pop up box will appear asking if you want to “replace or append” what’s in the text box. Always select, “APPEND”, then add the information.**

Contributing Practitioner

If more than one staff person participates in the assessment you can indicate that person’s name in the **Contributing Practitioner** box on the **Finalize** tab.

Viewing Previous Assessments:

You can view any previous assessment through Abstracts in Chart Review and can cut/paste appropriate data into the new Assessments.