

What is NEW starting June 24, 2013? New Youth Assessments Live in Avatar

Watch the video located at: <http://www.smchealth.org/avatarguides>

1. Please watch the video!
2. 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.**

Overview of Changes to the New Youth Assessments V2:

- **The New Youth Initial Assessment V2** has 9 Tabs, and a total of 19 pages (**a reduction of 23-24 pages**). The MSE, DX, & LOCUS are now part of the main assessment form; there is **no** Bundle. This new form replaces the *current* Initial Assessment form, the PIN, and the Special Assessment for Youth and Pre-To-Three Assessments.
- **The New Youth Annual/Update Assessment V2** has 7 Tabs and a total of 10 pages (**a reduction of 9 pages**). The MSE, DX, & LOCUS are now part of the main assessment form; there is **no** Bundle. This new form replaces the *current* Annual/Update forms for Youth and Pre-To-Three.
- Users must now select the **type** of Initial and Annual/Update assessment they are performing. There are now 6 types you must select from: **Initial Assessment** (Clinician, Casemngr); **Multi-Discpl. Assessment** (incl MD Eval); **Physician Initial Eval** (MD/NP Only); **Physician Supplemental Info** (MD Only); **Prenatal to Three Assessment**; or **School Based Mental Health**.
- A **risk evaluation template** can be accessed by Right clicking inside the Text Box.
- **Infant Assessment Information** is completed on Tab 6 (2 pages) and becomes activated when the Pre-to-Three Assessment Type is selected. Right click inside each text box to select templates.
- The **IEP Assessment Report** is a name change to IEP Reports. It is in the same location and will continue to work with older assessments.
- Paper Worksheets for the *NEW* Initial and Annual/Update Assessments are available for assessments done in the field. "Paper" Assessments Worksheets need to be completed/data entered into Avatar, and then shredded. Paper Worksheets are located at: <http://smchealth.org/avatarguides>
- The Youth Assessments are located at Avatar CWS → Assessments → Child/Youth Forms → Youth Initial Assessment V2. & → Youth Annual/Update Assessment V2.

When is the Start Date to Use the New Youth Assessments V2?

1. The new forms will be available Monday June 24, 2013.
2. 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 July 31, 2013.

New Changes to the Youth ANNUAL/UPDATE ASSESSMENT:

MOST IMPORTANT: Select Assessment Type FIRST!

- Select **Annual**, required fields become red on all pages and tabs.
- Select **Update**, complete only the fields 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**:

- Annual pulls forward information from the **last** assessment, regardless of which assessment form used. LOCUS, MSE and Clinical Formulation **do not** pull forward - you must complete them.
- The Diagnosis and Original Date/Time of Diagnosis **is** pulled forward. For changes to any diagnosis field, manually enter the date/time for the change.

For **UPDATE**:▪ Use **Update** to add additional information midyear, to change diagnosis, the LOCUS and/or to update a specific field.

For Both Initial and Annual/Update Assessments

Diagnosis – If there is **NO** Axis II Diagnosis, enter **V7109**. To **DEFER** an Axis II Diagnosis enter **V7999**. The **V must be upper case or Avatar will not accept!** ▪ Enter any additional diagnoses in the **Diagnosis Comments** text box on Page 2 of this Tab. ▪ Primary Diagnosis automatically fills in; do not change unless the Primary Diagnosis is an Axis II Diagnosis.

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:

1. Staff Selection Identifier: For any of the Text Box fields, Right click inside the text box, select *System Template* → **Staff Selection Identifier - your name** is inserted 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.**

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

For the Pin or Physician Supplemental, YOU are now the author for this V2 Youth Assessment.

Your choice is to:

▪ **Review** the information that has been brought forward and keep it, ▪ **Erase** or **modify** information in a box or section and complete with **your** information. This will not erase or delete information from the finalized assessment. ▪ **Complete** only the fields you want to supplement or that are required. ▪ Once finalized YOU are the author of this V2 Youth Assessment. ▪ When the V2 Youth Assessment is printed it will show only you as the author.

Viewing & Printing V2 Youth Assessments:

View & print any previous assessment through Chart Review→ Abstracts→ Assessments Child/Youth (All) or through Reports, if School Based. You can also cut/paste info into the new Assessments from previous assessments.

How do I know if an assessment is completed? See the Client Dashboard and Documentation at a Glance.

Where did the Pending Option go? The PENDING option is used only by a Trainee or first year resident requiring a Co-Signature. For Pending, select the name of your supervisor from the *Send To* drop down on the Finalize Tab; then enter a message in the Send To Outgoing Comments box.

Community Worker/RN without a master’s degree in psych must now use DRAFT:

You will inform the licensed/registered staff that the assessment is ready for completion and to be finalized by sending an Avatar notification, e-mail, phone contact or in person.

Who Can do What? Assessments MUST be Reviewed and Finalized by a Licensed/Waivered staff: MD/NP, MFT/LCSW/ASW, Psy(PhD/PyD), RN w/Psych MS, or Trainee w Co-Signature.