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Avatar NX Updates and Tips

Important! Read the new "Assessments and Diagnosis" Section (p 72-86) before completing the new CalAIM Assessment Form and before you update any diagnoses.

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Section 1 Avatar NX: The Basics

- Accessing Avatar
- Menus and Task Bars
- Customizing Your Views (including Widgets)

Accessing Avatar NX

1. "Application Update Required" Notice

Application Update Required
The version of myAvatar NX that you are running is not the most recent version. To
update, please reload the application by pressing Control and F5 at the same time on
your keyboard.

If you see this pop up and pressing the "Control" and "F5" button does not work, simply click the refresh button on your internet browser and Avatar NX should now be accessible.



2. Logging In To Avatar NX

We have received a number of requests for support in logging-in where it turned out that the "fix" was very simple! Please make sure that your log-in screen contains all of the information shown in the screen shot to the right.

Please make sure that System Code field is set to the System Code that you were assigned (e.g., LIVE, LIVESMMH, LIVEEC, etc.). If you are unsure of what code you were assigned, contact BHRS IT.

If you still have trouble logging in, please contact BHRS IT for support.



Menus and Task Bars

3. What are the different menu bars and tasks bars available to quickly find forms?

	(1) <u>Search Bar</u>	(2) <u>My Favorites</u>	(3) <u>Forms Menu</u>	(4) <u>Activity Panel</u>
View Tab	Available either on top left of middle center of screen, depending on which view you are in.	Left Side of Screen in Forms	Documentation Tab	Activity Panel on right side of window. Can view To Dos, Appointments, List of Open Forms, and Widget menu.



(1) <u>Search Bar</u>



The search bar is located in the center of your screen on your main 'myDay" page when you don't have any forms open.

The search bar is on the top left side panel when you are in any of the other view tabs or have a frm open.



(2) My Favorites

If you would like to save your frequently used forms in one easy place, we recommend using the "My Favorites" feature in you left hand Menu bar.

First, select "My Favorites" and then select "Edit Favorites" from the drop down menu that appears. A pop up window will appear which you can use to find forms/reports you would like added to your Favorites.



You can organize your forms by creating folders using the "Add Folder" feature on the top right of the pop up window. Use the "Edit" is button to rename the folder.

To reorganize items or put items into folders, simply click on the item you want to move and drag and drop to the desired location.

FAVORITES EDITOR	×
Q What can I help you find?	Add Folder
MH Client Dashboard	I 🗙
E Reports	🗷 🗙
Assessments	🕑 🗙
Progress Notes	I 🗶
Mental Health Progress Note	(🖉 ×
New Folder	Save Cancel
Save Dismiss	

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Here

(3) Forms Menu

In the old Avatar, there was a menu bar that listed all the documents available to view/open was always visible whenever the application was open. With Avatar NX, **the menu bar is still there** but it's only visible <u>after</u> you select a client.

To view the menu bar in Avatar NX, first click on the client, then click on the "Documentation" tab at the top of the screen (see screen shot to the right).



(4) Activity Panel



Click this icon at the top right of your screen to open up a side bar that displays multiple items. This is your "Activity Pane." You might or might not have a number circled in red. The number indicates how many forms you currently have opened.



This icon opens up a view in your Activity Pane that shows your upcoming appointments by day. Use the arrows to move forward or backwards to view different days.

This icon opens up your To Do List in your Activity Pane. Here you will see items such as Progress Notes that were kicked back to you for editing by your supervisor, Draft items that have not yet been finalized, etc.

This icon that is on the top right of your Activity Pane is what you would click on to view your Current Activities in your Activity Pane. This window lets you see all the forms you currently have open.

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Customizing Your Views (including Widgets!)

4. Ways to adjust how Avatar NX looks.

Many staff are reporting that they are having trouble navigating Avatar NX because of how it looks. For instance, widgets are too small to easily view documents, the way the screen looks to them is different from what they saw in webinars and in this Avatar NX Updates Document, etc. Many of these problems can be addressed by adjusting your setting or personalizing your widgets. See the main ways to adjust your view settings below.

	Zooming In/Out	Customizing Your Widgets	Undocking Widgets
Problem	 Can't see boxes to enter data Putting data in the text box, but it's not showing what I entered Words on form overlap. Form looks messy and disorganized. Text on form doesn't line up or skips to another line for no reason. My screen doesn't show the same button options that I have seen in examples (e.g., "Launch Report" doesn't show up on my console widget when I pull up an assessment form. 	 Takes too much scrolling to get to the widget I need Too many widgets I don't need are on my screen Missing a widget that I should have 	 Widget box is too small Want to view contents in widget while simultaneously exploring other information in client's chart.

Zooming In/Out

Can't input date or time into date/time fields? Text overlapping in the window? Before submitting a support request to IT/QM, see if magnifying or reducing the size of the window/text solves the issue. For example:



Customizing Widgets

Good news! You can actually customize how the widgets are displayed on your screen on most of your Avatar NX view tabs. In order to ensure you are set to edit your widgets, click the "Customize" button on the top right of your NX window to "On."



You can now resize/move/add/delete widgets based on your preference! (See example on next page.)

To add a widget, simply click on the widget in the Activity Panel that you want and **drag and drop** it to your main view tab screen (Clinical/Admin/Medical/SUD) that contains all your widgets.

Sample Customization of Widgets: You can see that some were extended to be larger, and for those widgets that I would prefer to just expand into a separate window, I've made them small enough to just show the widget name and icons that allow me to refresh/delete/open in a separate window. Once you're satisfied with the changes you have made, click the "Customize" switch to the "Off" position to save your changes.

PROGRESS NOTES										ď≎×
Previous days: Selection:	30 All Notes	✓								
No information found.										
UPCOMING APPOINTMENTS				₽₽₽	PAST APPOI	NTMENT	5			ď≎×
					Date 2023-03-	Time 01:00	Service Sta	tus Site SOUTH COUNTY	Staff BLADE,MICHELLE	^
					03 2023-02- 24	PM 01:00 PM	REHABILITATION GROUP	ADULT SOUTH COUNTY ADULT	NAKANO BLADE,MICHELLE NAKANO	
					2023-02- 17	01:00 PM	REHABILITATION GROUP	SOUTH COUNTY ADULT	BLADE,MICHELLE NAKANO	
					2023-02- 10	01:00 PM	REHABILITATION GROUP	SOUTH COUNTY ADULT	BLADE,MICHELLE NAKANO	
					2022-12- 16 2022-12-	01:00 PM 01:00	REHABILITATION GROUP	SOUTH COUNTY ADULT SOUTH COUNTY	BLADE,MICHELLE NAKANO BLADE MICHELLE	
				clau	2022 12		REHABILITATION GROUP			TICU
ADMIN PAPER CONSENT TRACKING						DNSENT F	ORMS TRACKING			⊡ to x
DX FOR CURRENT ASSESSMENT V2	⊡°2×	MEDICATIONS	⊡°≎×		DUF CHARTA	/IFW	C'2× SERVICES-I			
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For a video demo of how to customize widgets, view the "Customizing Widgets" module in the Avatar NX training curriculum in the LMS.

Undocking Widgets

If you want to view a form in the undocked / expanded Console Widget Viewer, **undock it first** by clicking on the undocking icon top right corner of the widget, **THEN select the form**. See screenshot below.



You can undock other widgets (but not just the Console Widget Viewer) as long as it has the undock icon at the top right corner of the widget.

You can even undock multiple widgets at the same time. Skip to here for an example of how to do this

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located on the

Trouble Shooting: Document Does Not Show in Undocked Console Widget

If you get a blank window noting that "Only new documents will be displayed in this console viewer" don't worry! It just means you need to click the document in the Forms table.



Section 2 Viewing Client Charts

- Finding Clients in NX
- Opening Forms for Clients
- Opening Multiple Open Charts / Forms

Updated: 4/3/2025

Finding Clients in NX

5. Finding Clients in NX

There are two main ways to search for clients in Avatar NX.

Basic Search Using Search Bar	Advanced Search
Center of MyDay View Tab screenLeft hand side panel of NX	Available on some forms but not all
Type your client's name or MR# in the search bar to pull up your client's name. Double click on their name and you will be able to view your client's chart. See <u>Search Bar</u> section for information on where to find the search bar.	If you click on the "Advanced Client Search" link underneath the search bar, you will be able to search for clients using multiple criteria. When using the "Advanced Client Search" feature in Avatar NX, you'll see a field called "Assigned Client ID." This is the Medical Record number that staff associate with clients (MR#).

Opening Forms for Clients in Avatar NX

6. How do I open existing forms for clients in NX?

There are several ways to quickly view existing forms (both draft and finalized) through NX depending on if you're searching for scanned documents or forms created directly in Avatar. One is with the Forms Widget/Console Viewer and the other is via the Clinical Document Viewer.

Viewing Forms/Documents via Console Widget Viewer

Forms widget and Console Widget Viewer which are both located in the Documentation view tab.



This method allows you to view either

- Scanned forms OR
- \circ $\,$ Forms that were created directly in Avatar.

First, select either the "Forms" or "Scanned Documents" tab depending on the type of document you want to view.

Once you select the tab you want, you can further filter by clicking on the desired document on the forms menu or using the drop down menu in the "Form Description" column.

When you find your document on the list, double click it and it will show up in the Console Viewer to the right of the Forms Widget.

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Clinical Document Viewer

m.	ewer using the search here)AR	Forms	i
CLINICAL DOCUMENT VIEW	ER		Jrat Undock Name	nent Viewer	Menu Option / Avatar PM / RADplus Utilities / Document Management
Search Results			Clinical Docur	nent Viewer	/ Avatar CWS / Document Management
elect Search Criteria					
elect Type:	Client	·	Program:	ZNON-CONTRAC HOSPITAL	CT FFS
elect All or Individual Client:		\odot Individual		ZWOMEN'S REC ASSOC end 4/30/1	OVERY
elect Client:			Episode:		~
ser:					
ocument Status:	□ Final		Document Source	Batch Scanning	Module
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orm Selection			Form Restrictions	Include	Exclude
Entire Chart			Do Not Print	0	۲
O Legal Medical Record			Do Not Release	0	۲
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CLINICAL DOCUMENT VIEWER																
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the "View" and "Print Selected"				938760	TEST,JOLLY T	1		Client/Treatment Recovery Plan	02/18/2015	Final	Client/Treatment Recovery Plan	ALYS HERRING				•
buttons at the bottom of the screen.	Doc	cumen	ıt List			_						1 – 25 of 118	K	< :	> :	>
							III View	Print Selected	Vo	id	X Close All Documents					



7. How do I open new forms for a client?

For client specific forms, such as Progress Notes, Assessments, etc., you **must** first select a client. Then you can either search forms using the search box or use the "New Record" button in the forms widget in Avatar.



For additional information on how to better utilize widgets to view forms, please click here to see how to edit your widgets.

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Opening Multiple Client Charts / Forms in NX

8. How to Open Multiple Forms for the Same Client

Sometimes you might be working on a client's chart and would like to view multiple documents for the same client simultaneously (e.g., while you are working on an assessment, you want to view the latest treatment plan, last assessment, and progress notes).

If you want to view multiple documents from the Console Widget, simply undock multiple Console Windows from the widget and then select the documents you want to view in the Console Widget using the forms widget.

For other documents, if they are available through your widgets you can undock each widget you need.

Once you have your windows open, you can position and resize as you like. Screen shot below shows example of how 3 undocked widgets can be positioned on one screen.

See <u>Undocking Widget</u> <u>section</u> for information on how to undock the widget.



9. How to Open Multiple Charts/Forms for Multiple Clients in Avatar NX.

You have multiple ways to toggle between forms for different clients. However, we will show below the two easiest ways to do so.

You will see two areas of the Avatar NX screenshot below highlighted in purple boxes – one at the top of the screen and the other to the right of the screen. You can either click the box with the client name at the top of the NX window to see a drop down list of currently open forms for that client, or you can click on the open form using the Activity Pane to the right of your NX window.

Please note that some forms, such as the Progress Notes and Medication Administration Record, will not be listed in either the client drop down at the top or the under the client name in the Activity Pane. You will only be able to see which client each of those forms is for by opening the form (clicking on either the form link at the top or the form link in the Activity Pane).



Section 3 Printing and Scanning

- Printing Reports / Formatted Versions of Forms
- Scanning / Uploading Documents in NX

Printing Reports / Formatted Versions of Forms

For instructions on how to print assessments, please see the <u>Assessment</u>. To print progress notes in bulk, see the <u>Progress Notes</u>.

10. How do I print formatted versions of forms?

There are several different ways to print formatted / formal versions of client documents/forms in Avatar NX.

	Printing Individual Forms	Printing Multiple Forms	Saving PDF Versions of Forms
View Tab	Documentation Tab	Documentation Tab or Search function	Pop up of Report.
Description	This is limited to sending a To Do notification to one Avatar user. Cannot send to multiple Avatar users. Does not link directly to a form.	If this button is embedded in the form, you are able to send To Dos to multiple users. Links directly to the form.	For use when co-signature is required. Links directly to the form. See " <u>Co-Signature</u> " section for more information on Document Routing.

CLINICIAN					៥ខ		CONSOLI	e wic	GET VIEWER		۲ ک			
Forms So Form Description	Episode 🗘	ts Date 🗘	Time 🗘	Data Entry By	Workflow ^ Status 🗘	I	Client	Treat	ment and Recovery Plan X		"Launch Report" allows you to print a formatted			
Client	25 i 🗸	40 i 🗸	47 i 🗸	ANDREI	4 it V	l	Date Form Clier Clier	e Crea n Nar nt's N nt's D	ated: 05/23/2024 at 03:07 PM PDT ne: Client Treatment and Recovery ame: TEST,JOLLY T JR (000938760 OB: 12/20/1960	Plan))	version of the form. FOR ASSESSMENTS,			
Treatment and Recovery Plan	NORTH COUNTY YOUTH)			OSTREA					" Print " allows you to print an	JNTY OVERY SI	use "Launch Report" ONLY for Assessments			
Client Treatment and Recovery Plan	71 (410301 CENTRAL COUNTY ADULT)	04/24/2024	If the form has not yet beer finalized, "Open Record"			as not yet been Open Record "		has not yet been " Open Record "			unformatted PDF version of what		submitted on or after 12/16/2024.	
Client Treatment and Recovery Plan	84 (921400 DALY CITY YOUTH HEALTH CTR)	12/14/2023	allows	form		Plan Ty CLIEN treatm			you see in the "Console Widget Viewer"	ie get at the clien	For Assessments submitted prior to			
Client Treatment and Recovery Plan	84 (921400 DALY CITY YOUTH HEALTH CTR)	12/11/2023	asse created	ed prior to 12/16/2024. Plan End Date: 05/23/2025				·	run a separate report called the "PreCalAIM"					
Client Treatment and Recovery	71 (410301 CENTRAL COUNTY	09/25/2023		DELAGUILA	.		Did Wa	d Clien as Clie	t sign the Treatment Plan?: Signed Paper (nt offered a copy of the Treatment P. n?:)	Copy (es-Accepted				
Form Specifi	ic PreDisplay	en New Re	cord + Cl	ear Filters	47 of 47 rows			1	/ 1 ▶ 49%	int •	aunch Report Append			

Printing Formatted Versions of Individual Forms

Some forms (but not all) will display a "Launch Report" button on the bottom right of the "Console Widget Viewer."

*To print formatted versions of an individual progress note, please use the "Progress Notes Report" and select the date of the note you wish to print when generating the report. Instructions on how to print using Avatar reports are included in the next question.

*To view the full contents of any assessment submitted prior to 12/16/2024, do NOT use the Console Widget Viewer or the "Launch Report" button. You <u>MUST</u> print a report using the "PreCalAIM" versions of the assessment reports. See list of reports in the <u>Frequently Used Forms for MH Staff</u> section of this manual.

Step 1) Select a client.

Step 2) Click on the **Documentation** Tab. You should see the Forms widget and a Console Widget viewer. Click on the drop down menu from the "Form Description" column of the forms widget and select the type of form you're looking for.

CLINICIAN CONSOLE WIDGET VIEWER					Ľ
Forms Scanned Documents Client Treatment and Recovery Plan X					
Form Episode \Diamond Date \Diamond Description \Diamond	Time 🗘 🛛	Data Entry By Ç	Workflow ^ Status 🗘		Î
Clie 🗸 25 i 🗸 40 i 🗸	47 i 🗸	24 i 🗸	4 it 🗸	Date Created: 05/23/2024 at 03:07 PM PDT Form Name: Client Treatment and Recovery Plan Client Name: TET 101 UF 10 (2007)	
Child and Adolescent Needs and Strengths	7 PM	ANDREI OSTREA	Final	Client's DOB: 12/20/1960 SAN MATEO COUNTY BEHAVIODAL HEALTH & RECOVERY SERVICES	
Client Treatment Plan Addendum Client Treatment and Recovery Plan	B AM	ANDREI OSTREA	Draft		
Clinical Consent Forms				Client Treatment and Recovery Plan Plan Name: Test Plan issue with Raphael_052324	
Clinical Consent Retraction I PM Clinical Medication Consent		JOSEPH DELAGUILA	Final	Plan Type: Initial CLIENT'S OVERALL GOAL/DESIRED OUTCOME - What the client wants to accomplish from	
Plan HEALTH CTR)				treatment, in client's words.: Test Plan issue with Raohael 052324	
Client 84 (921400 12/11/2023 Treatment DALY CITY and Recovery YOUTH Plan HEALTH CTR)	01:16 PM	JOSEPH DELAGUILA	Final	Plan Start Date: 05/23/2024 Plan End Date: 05/22/2025	
Client 71 (410301 09/25/2023 Treatment CENTRAL and Recovery COUNTY	10:24 AM	JOSEPH DELAGUILA	Draft	Did Client sign the Treatment Plan?: Signed Paper Copy Was Client offered a copy of the Treatment Plan?: Yes-Accepted	•
Form Specific PreDisplay	<< 1 >		47 of 47 rows	I /1 ▶ 49% - → + 35 ►	•
Open New Rec	cord Clear I	Filters		Open Record Close All Print + Launch Report Append	

Step 3) Double click on the form you would like to print. Then click on "Launch Report"

CLINICIAN CO					៥ខ	CONSOLE WIDGET VIEWER		
Forms S	canned Documen	ts				Client Treatment and Recovery Plan $ imes$	"I aunch Benert" allows	
Form Description	Episode 🗘	Date 🗘	Time 🗘	Data Entry By	Workflow ^ Status 🗘	H C-	you to print a formatted	
Clie 🗸	25 i 🗸	40 i 🗸	47 i 🗸	24 i 🗸	4 it 🗸	Date Created: 05/23/2024 at 03:07 PM PDT Form Name: Client Treatment and Recovery Plan Client's Name: TEST_JOLLY T JR (000938760)		
Client Treatment and Recovery Plan	61 (410000 NORTH COUNTY YOUTH)	05/23/2024	03:07 PM	ANDREI OSTREA	Final	Client's DOB: 12/20/1960 SAN MATEO COUNTY BEHAVIORAL HEALTH & RECOVERY SI	use "Launch Report" ONLY for Assessments	
Client Treatment and Recovery Plan	71 (410301 CENTRAL COUNTY ADULT)	04/24/2024	10:38 AM	ANDREI OSTREA	Draft	<u>Client Treatment and Recovery Plan</u> Plan Name: Test Plan issue with Raphael_052324	submitted on or after 12/16/2024.	
Client Treatment and Recovery Plan	84 (921400 DALY CITY YOUTH HEALTH CTR)	12/14/2023	03:21 PM	JOSEPH DELAGUILA	Final	Plan Type: Initial CLIENT'S OVERALL GOAL/DESIRED OUTCOME - What the clien treatment, in client's words.:	For Assessments submitted prior to	
Client Treatment and Recovery Plan	84 (921400 DALY CITY YOUTH HEALTH CTR)	12/11/2023	01:16 PM	JOSEPH DELAGUILA	Final	Test Plan issue with Raphael_052324 Plan Start Date: 05/23/2024 Plan End Date: 05/22/2025	run a separate report called the "PreCalAIM"	
Client Treatment	71 (410301 CENTRAL	09/25/2023	10:24 AM	JOSEPH DELAGUILA	Draft	Did Client sign the Treatment Plan?: Signed Paper Copy Was Client offered a copy of the Treatment Plan?: Yes-Accepted	Assessment Reports.	
Form Specif	fic PreDisplay	en New Re	cord Cle	ar Filters	47 of 47 rows		aunch Report Append	

Step 4) Click on "Print Report" located on the top left corner of the window to print a copy for your client.



Printing Formatted Versions of Multiple Forms

After selecting your client in Avatar, use the search function to find the report for the forms you want to print. Check out a list of commonly used reports in the <u>Frequently Used Forms for MH Staff</u> section of this manual. You can add these reports to your "<u>Favorites</u>" to easily access them in the future.

myAvatar® NX myDay	Documentation Documentation Documentation Documentat	
LOCGED IN AS TRAIN04,TRAIN Q What can I help you find? Advanced Client Search Recent Clients My Forms My Exercites	Mental Health Progress ▲ TEST.JOLLY T(938760) Ep: 22 : 416800 EAST M, 12, 10/27/2010 Ht: 3' 4.0°, Wt: 200 lbs, BMI: 87.9 DX P: 297.1 Delusion	Welcome, TRAIN04,TRAIN Every Day Matters Q [W/hat can I help you find? Advanced Client Search ENDAR C* C* MY TO DO'S
Recent Forms > Control Panel Control Panel Recent Clients Site TEST,JOLLY T (000938760)	Mental Health Progress Note Launch OrderConnect ADULT Reassessment v2 YOUTH Reassessment v2 Scheduling Calendar DX from Assess. ADULT DX from Assess. YOUTH	t Duration: 30 minutes

All 4	Clients 0 Staff 0 Forms 4	×		
	Forms	When searching for a		
Undock	Name	Menu Option	report, make sure that the	
Z	Client Treatment Plan V2	/ Avatar PM / Reports	item you select is a	
Z	Client Treatment and Recovery Plan	/ Avatar CWS / Treatment Planning	Report	
Z	Client Treatment Plan Addendum	/ Avatar CWS / Treatment Planning		
C	BHRS Client Treatment and Recovery Plan	/ Avatar CWS / CWS Utilities / Treatment Pla	an Maintenance	

Once you open the report, enter the date range for all the forms you would like to print.

Then select "Process" to generate a formatted PDF report.



Select "Print Report" at the top left corner of the pop up window to print the report.



New Feature for Progress Notes Report!

The Progress Notes Reports for both SUD and MH now include an option to select "Draft" or "Final." Remember, only Final versions should be released in a records release.



Return to Table of Contents

Saving Formatted PDF Versions of Forms

You can save a PDF version of the report by selecting "Export" after you generate the report. Then, select the file type from the drop down menu that appears.



Print Report Export					
Format: Adobe Acrobat (PDF)					
Pages:					
All					
○ Page Range:					
1 To: 1					
Create bookmarks from group tree					
Ok Cancel					
Tind ★ 1 of 1+ ★ 100% ★					
Group Tree					
■ 8/1/2023					
± 7/31/2023					
SAN MATEO					
BEHA					

Use the page range feature to specify which pages to print. If you are not sure of which pages to select, scroll through the pages in the preview image and use the page number field to determine the page of the progress note you would like to print.

Scanning / Uploading Documents in NX

11. How do I scan documents into Avatar?

Step 1) Launch Document Capture in Avatar NX by clicking on the picture icon on the left menu bar.



Step 2) Select if you will be scanning a document using a scanner or importing a file from your computer.



Step 3) You have the option to either select a specific episode, or if the document is not associated with a particular episode then you can choose "non-episodic."

	Select Episode	2
	Episode Number	
Non-episodic		~
	ок	
	UK	

Step 4) Complete the 'Document Type" "Document Date" and "Document Description" fields.



Step 5) Click on the large icon at the center of the screen to begin process of scanning or uploading document.



Step 6) Select whether or not you will be scanning or importing a file. If importing a file from your computer, either find the file using the "browse" button or drag and drop the file into the box.



Capture Save Reset This tells you how many files have been selected for upload / scan. 1 files selected. Cance Done

TEST, JOLLY T JR (000938760) TEST, JOLLY T JR (000938760) Location: -Problem P: -Ht: 5' 11.2", Wt: 250 lbs, BMI: 3... Adm. Pract.: • 3. HIGH Capture 🔹 H Save Reset Click Save to complete the process. 323% "S 🔗 🖀 Delete ← 🔢 / 1 → Close Document Capture

Step 8) This message should pop up verifying that your scan / import was successfully completed.

		4) CODEINE - Active	
Capture 🔻 💾	Save Reset	III \$	
	Save was successful.		
	Ocument Added to Avatar!		
		Non-episodic	

Step 7) After verifying that you uploaded the files you want, click "Save"

Section 4 Communication between Avatar Users

- Client Alerts
- Urgent Care Plans
- Selecting the Correct Avatar User ID for Staff
- Sending To Dos and Notifications
- Co-Signatures
Client Alerts

12. How Do I Create a Client Alert?

- 1) Open the client's chart in Avatar.
- 2) Search "Client Alerts" in the **Search** field.
- 3) If the client is associated with previous alerts, the **Pre-Display** will show all the client alerts that have been saved for the client. To create a new alert, click **Add**.

	Opening:	Client Alerts
Home > Select Client >		
✓ Selected Client : TEST, JOLLY T JR (0	00938760)	
Select Record		
	Custom Massage	
	AUTHORIZE CLIENTS WITH INSURANCE OR NORIDIAN (EXCEPT MFT'S)	01/31/2016
WARNING - HPSM KAISER/ 2DI-CAL CLIENT	WARNING - THIS IS A HPSM KAISER/MEDI-CAL CLIENT. DO NOT ENTER KAISER GUAR 451 COVERAGE	01/31/2018
	Changing the Error custome to warning custom	12/24/2019
Add Edit	Delete Cancel	

- 4) In the **Type of Alert** field, select the alert type.
 - a. Note: The "Warning" is the only alert type that allows you to create your own custom message using the Custom Message field.
- 5) Complete the field for Active or Active for Date Range. Enter Active if you do not want to associate the alert with a date range.
- 6) Optional: In the **Applicable Forms** field, select if you want the alert to be triggered when any form is opened for a client (**All Forms**) or if you only wan the message to show when specific forms are opened.

- 7) In the **Episodes** field, select **All Episodes** if you want the alert to be applicable to all episodes, or if you want the alert to show only for particular episodes, then click on the appropriate episodes.
- 8) Click Submit.

ype Of Alert *			
Select		× ~	
I		Q	
Alert QM of billa	ble diagnosis.	A	
ASSIGNMENT OF	F BENEFITS DUE	Disabled	•
CA MFT M to M s	sent to HPSM for review.		
CALL CENTER STO	OP DO NOT FORWARD TO HPSM.	() tes	() NO
CARE ALERT			
CARE MESSAGE		End Date	
	ISED		
CLIENT IS DECEA	15ED		
CLIENT IS DECEA	LARLE NON REC 777 ONLY	-	
CLIENT IS DECEA	I ARI F. NON REC 777 ONLY	-	
	LARIE NON REC 777 ONLY	*	
	Search	•	Q
DECLENT IS DECEA	Search faults (Avatar MSO)	~	Q
pplicable Forms All iClear 837 Fast Def 837 Institutio	Search faults (Avatar MSO) onal Defaults (Avatar MSO)	~	Q
pplicable Forms All IClear 837 Fast Def 837 Institutio 837 Outbour	Search faults (Avatar MSO) onal Defaults (Avatar MSO) dr Re-Billing Service Assignment (Avatar MSO)	~1	Q
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CLIENT IS DECEA CLIENT NON BIL pplicable Forms All [Clear 837 Fast Def 837 Institutio 837 Outbour 837 Professi pisode(s) * All [Clear	Search Search AR-Billing Service Assignment (Avatar MSO) Ional Defaults (Avatar MSO) Search Search Search	~1	Q
All Iclear AST Professional Content of Cont	I ABLE NON REC 777 ONLY Search faults (Avatar MSO) onal Defaults (Avatar MSO) inonal Defaults (Avatar MSO) Search Search		Q

13. How Do I Edit a Warning Alert that Has a Custom Message?

When you get to the pre-display, select the alert you would like to edit, and click the "Edit" button at the bottom of the screen. Select the appropriate existing alert and edit the custom message field needed.

14. How Do I Delete/Disable a Client Alert?

When you get to the pre-display, select the alert you would like to edit, and click the "Edit" button at the bottom of the screen. Select "Yes" to under the "Disabled" section to deactivate/disable the alert.

Urgent Care Plans

15. How Do I Create an Urgent Care Plan for a Client?

Open a client's chart in Avatar and search for the "Urgent Care Plan Bundle"

urgent car	e			
Ivanced Clie	ent Search			
		Here is what I f	ound:	×
All 2	Clients Staff Forms			
		Forms		
Undock	Name		Menu Option	
51	URGENT CARE PLAN		/ Avatar CWS / Other Chart Entry	
С	URGENT CARE PLAN Bundle		/ Avatar CWS / Other Chart Entry	
	vanced Clie Vall 2 Clie Jndock	vanced Client Search Val 2 Clients Staff Forms The search Indock Name URGENT CARE PLAN URGENT CARE PLAN Bundle	Indock Name URGENT CARE PLAN Bundle URGENT CARE PLAN Bundle	vanced Client Search Here is what I found: Indock Name Menu Option URGENT CARE PLAN / Avatar CWS / Other Chart Entry URGENT CARE PLAN Bundle / Avatar CWS / Other Chart Entry

The Urgent Care Plan Bundle includes 2 Forms:

- 1) **Client Alert** form Follow instructions on the Client Alert section above.
- 2) Urgent Care Plan form

To complete the Urgent Care Plan, fill in the required information. The "Urgent Care Treatment Plan" is where you should type the details of the Plan. For Urgent Plans that include medication information, type in the type of medication, dose, date, any issues, MD prescribing. When you've finished, click "Submit"

RGENT CARE PLAN					Submit
Jrgent Care Plan	✓ Identifying Information				
Identifying Information Treatment Plan and Caution	Start Date *			End Date	
	11/27/2024				
	Status *				
	Open		× ~		
	Client Information Update D	iagnosis if needed			
	Date of Birth			Pesion	
	12/20/1960			Select	
				Team	
	The second Devidence				
	reatment Providers				
	Therapist/Caseworker *				
			٩		
	Psychiatrist				
			٩		
	✓ Treatment Plan and Cautio	n			
	Hannah Care Trackment Dies				
	Orgent Care Treatment Plan				•

16. How Do I Deactivate an Urgent Care Plan?

Step 1) Follow the Directions in the Client Alert section above on how to deactivate a client alert.

Step 2) Search "Urgent Care Plans" under your Documents View Tab and select the Urgent Care Plan you want to edit. Click "Open" to open the form.

CLINICIAN					Ľ≎	CONSOLE WIDGET VIEWER	Ľ
Forms Sc	anned Document	s				URGENT CARE PLAN X URGENT CARE PLAN X	
Form Description \$	Episode 🗘	Date 🗘	Time 🗘	Data Entry By	Workflow Status 🗘	Urgent Care Plan Start Date: 11/27/2024	Â
URG V	ALL V	ALL V	ALL V	ALL V	ALL V	Status: Open	
URGENT CARE PLAN	-	11/27/2024	-	ERI TSUJII	-	Date of Birth: 12/20/1960	
		11/2//2024		ENTROOM		Therapist/Caseworker: ERI TSUJII (053266)	
PLAN URGENT CARE PLAN	-	10/20/2017		JEANNINE MEALEY	-	Urgent Care Treatment Plan: Test 2 for 11/27/2024	
Form Spec for	c PreDisplay		<< 1 >		6 of 6 rows		ł
	Open	n New Reco	rd • Clear	Filters		Open Record Close All Print -	•

Change the Status on the Status drop down from "Open" to "Closed" then click "Submit.

URGENT CARE PLAN		
Urgent Care Plan	✓ Identifying Information	
Treatment Plan and Caution	Start Date	End Date
	11/27/2024 🗰 🔳	<u> </u>
	Status *	
	Closed	× ~
	1	Q
	Closed	
	Open	Regi
		Sal

Finding and Selecting the Correct Avatar User ID for Staff

17. Multiple User IDs show up for my supervisor (or supervisee) when trying to communication via Avatar (Co-signature, etc.)

There are some staff who have multiple User IDs in Avatar, which results in their name coming up more than once when staff search for them. This can be for a variety of reasons (staff person works in both SUD and MD, staff was formerly a contracted provider and is now a BHRS employee, etc.)

Q	tucker	
	Advanced Client Search	
		Here is what I found:
)AR	All 61 Clients 59 Staff 2 Forms 0	
mat		Staff
urat	Staff Name	Name
	TENNILLE TUCKER (061069)	TUCKER,TENNILLE
Ĭ	TENNILLE TUCKER (084680)	TUCKER,TENNILLE

When this happens, staff should first ask the staff person to whom they are trying to send the notification/co-signature which option to select. If they do not know, please contact Muriel Espera (MEspera@smcgov.org) in the BHRS Billing Department (a.k.a. MIS) to ask about which ID should be used.

Sending To Dos and Notifications

18. "Send Notification" Form is RETIRED

The "Send Notification Form" that was available in the old Avatar does not function in NX. If you try to use this "Send Notifications" form in Avatar NX, nothing will happen – it does not work.



19. How do I send forms to review to my supervisor or other Avatar users now that the Send Notifications form has been retired?

There are several different ways to send Notification or To Do's to other Avatar users. The table below shows 3 ways to send To Dos or Notifications.

	<u>"Send To Do" Quick Action</u>	<u>"Send To Do" button on Forms</u>	Document Routing
View Tab	MyDay Tab in the Quick Actions widget	Available on select forms (not available on all forms)	Available on select forms (not available on all forms)
Description	This is limited to sending a To Do notification to one Avatar user. Cannot send to multiple Avatar users.	If this button is embedded in the form, you are able to send To Dos to multiple users.	For use when co-signature is required. Links directly to the form. See " <u>Co-Signature</u> " section for more information on Document Routing.
	Does not link directly to a form.	Links directly to the form.	Links directly to the form.

<u>"Send To Do" through Quick Actions</u>

In NX, users will have to use the **Quick Actions** (on your "**myDay**" view tab) to send a **To Do** item. This can only be sent 1 at time to another user, and you **must select a client** before having access to these Quick Actions items. Then, fill out the pop up note, and click "Save." Your To Do item is now sent.



The receiving Avatar user should be able to view the To Do item in their To Do list (see next page for how the To Do looks to the receiving user).

When the Avatar user receiving the To Do item clicks on the To Do item, a screen will pop up with the



umentation Call Center

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Send To Do" button embedded in Forms

For some forms (such as the Transfer/Discharge, AOD 60 day Discharge), users can create a To Do directly from the form and send to multiple users (see screen shot below).

Unfortunately, this is not able to be added to all forms, so if you do not see the "Send To Do" button (see screen shot below) when you open the form, you will need to send a separate "To Do" through the **Quick Actions** process described above.



Co-Signatures

20. Supervisor Co-Signature Instructions (Document Routing)



The previous mechanism by which co-signatures were obtained in the old Avatar does not function in Avatar NX. To avoid notes being stuck in limbo and to ensure that staff are able to get the required co-

signatures, the Avatar NX mechanism for co-signature was turned on.

However, the NX mechanism comes with two new functionalities that cannot currently be turned off:

- 1) The Document Routing pop up will show every time a progress note is finalized regardless of if a co-signature is required, and
- 2) It requires the co-signers to input their Avatar password in order to approve documents. Instructions on how to address the document routing pop up if no co-signature is needed are included in the next few pages.

The IT department is continuing to work with the vendor to explore a solution to this that will avoid staff needing to take these extra steps. If a solution is able to be found, we will notify staff as soon as it's available.

	(۹	This no longer works in Avatar NX.
(1) BHRS Standard Note		â	
(2) BHRS Standard Note(Co-sign Required)		1	
(3)Restricted(No Disclosure W/O Consent)		I.	
(4) Restricted(Co-Sign Required)		I.	
(5) Disclosure W/O Consent			
(6) Disclosure W/O Consent(Co-Sign Req.)		•	User To Send Co-Sign To Do Item To
(1) BHRS Standard Note	×	\sim	Select 🗸

	Route	Document to		
Supervisor Search here Add		Team Search here Add		
Add Approver Admitting Practitioner Caseload Practitioners				
Search here				
Approver F	Final Approver	Title	Name	

How do I send forms for co-signature in NX?

Route Document to

"Document Routing ": This is a feature in NX that staff can use to route documents to their supervisor. Please note that this window **will pop up for** <u>all progress notes</u> that get finalized, <u>regardless of if the note requires a co-signature.</u> IT is unable to limit this pop up to show only for notes that require co-signature.

	<u>For Staff Who Do NOT require co-</u> <u>signature</u>	For Staff Who Require Co-Signature (Option 1)	<u>For Staff Who Require Co-Signature</u> (Option 2)
For which Staff does this option apply?	All staff, regardless of whether or not co-signature is actually required. (Licensed staff will see this, too).	Some accounts in Avatar are set to require a co-signature. These staff will see the "Supervisor" text as required (red font).	 Those staff who do <u>not</u> have "Supervisor" or "Add Approver" required but their supervisor still requires their co-signature should use this option. Some staff will see the "Add Approver" text as required (red font). Use this option if the Add Approver is required.
Description	Will generate when finalizing all progress notes regardless of if staff requires co-signature, but can be bypassed without sending to supervisor if staff does not require co- signature.	Available on Assessments, Treatment Plan, and Progress Notes.	Available on Assessments, Treatment Plan, and Progress Notes.
Additional Notes		The individual added as a co-signer using the 'Supervisor" field will be listed as "Supervisor" on the printout of the final, co-signed version of the document. Once you add the co-signer/approver and submit as "Final" the status will automatically change to "Pending Approval" until the co-signer approves the note.	The individual added as a co-signer will be listed as "Staff" on the printout of the final, co-signed version of the document. Once you add the co-signer/approver submit as "Final" the status will automatically change to "Pending Approval" until the co-signer approves the note.

For Staff Who Do NOT Require Co-Signature:

The Routing pop up box will still show up when you file the note, but the "approver" fields are not required*. Staff will just need to hit submit without filling anything out.

*Required fields will be in red font.

Info specific to progress notes: For staff who do not require a co-signature, be sure to select a note type that does <u>not</u> require a co-signature.



	Route	Document to	
Supervisor		Team	
Search here		Search here	
Add		Add	
Add Approver			
Admitting Practi	tioner		
Caseload Practit	ioners		
Search here			
Add			
	Einal Approver	Title	bl and a

IT has checked with the Avatar vendor to see if this pop up can be removed. However, we were informed that this is not something that can currently be removed.

For the time being, please continue to hit submit without adding a supervisor name while IT continues to work with our vendor to resolve this issue.

For Staff Who DO require co-signature (Option 1):

Follow the instructions on this page if...

1) The "Supervisor" text above the top left box is in red font.

When a staff person does require co-signer then the approver field will be marked as required (shown in red font).

Alternatively, on some forms there is a "Pending Approval" option that is active for some users. By selecting "Pending Approval" you will trigger the Document Routing window to pop up, and you will enter your supervisor name and click "add" to send to your supervisor.



For staff who require a co-signature, be sure to select a note type that <u>does</u> require a co-signature.



	F	Route Document to							
Supervisor Require	d								
Add Approver – Admitting Prace Caseload Prace	Add Approver Click the "Add" Button and Supervisor will show in the table at the bottom.								
LEAVE BLANK									
		Search by Last Name							
Add Approver	Final Approver	Search by Last Name.							
Approver Suj	Final Approver	Search by Last Name.							

orr	Verify Password	ecovery
ie Password		38760
ie Enter Passwo	rd	
Verify	Cancel	

Note for Approvers: Another change from the old Avatar is that with Avatar NX the approver needs to enter their Avatar password to complete the approval process. Currently, this is not a feature that QM or IT are able to disable, but IT is working with the Avatar vendor to find a solution. For more information on how supervisors can approve/reject notes from staff needing co-signature, move on the <u>next question</u> in this document.

For Staff Who DO require co-signature (Option 2):

Follow the instructions on this page if...

- 1) If nothing is marked as required, but supervisor is requiring <u>co-signature</u> (e.g., if supervisor wants to review new staff's notes for a period of time), OR
- 2) The "Add Approver" text in the center of the window is in red font.

Alternatively, on some forms there is a "Pending Approval" option that is active for some users. By selecting "Pending Approval" you will trigger the Document Routing window to pop up, and you will enter your supervisor name in the "Add Approver" field and click "add" to send to your supervisor.

Info specific to progress notes:

For staff who require a co-signature, be sure to select a note type that <u>does</u> require a co-signature.







Note for Approvers: Another change from the old Avatar is that with Avatar NX the approver needs to enter their Avatar password to complete the approval process. Currently, this is not a feature that QM or IT are able to disable, but IT is working with the Avatar vendor to find a solution. For more information on how supervisors can approve/reject notes from staff needing co-signature, move on the <u>next question</u> in this document.

21. Where do supervisor's go to review documents for co-signature?

Documents for co-signature should show up in the supervisors' To Do List, which can be found on the **My To Dos** widget in the MyDay view window or on the To Do section of the **Activity Panel** on the right side of the screen. See <u>Activity Panel</u> section for more information on how to access the Activity Panel. One you open the To Do List, you should be able to see all your pending To Do items, including ones that require co-signature.



Troubleshooting

If the supervisor does not see the To Do Item, this could be for several reasons:

- The supervisor has multiple user accounts associated with their name and the inactive/incorrect account was selected. Double check with the supervisor which account should be selected when sending To Dos.
- 2) If there is only one account that pops up and it's still not being received, it may be that the account may have been deactivated.

Accounts may be deactivated for a variety of reasons including, but not limited to: too many failed attempts to log in, not having used Avatar for an extended period of time (e.g., staff was on leave), etc.

If both you and your supervisor have been regularly logging into Avatar successfully, then contact BHRS IT directly to resolve the issue.



22. Finding Edited Comments from Supervisors

When a supervisor sends a form back to you for edits, you can find the form in your "To Do" section of your Activity Pane. See the <u>"Menus and Task Bar"</u> section of this document for more information on how to use the Activity Pane. If the form is locked and you are not able to edit, please contact BHRS IT to resolve this issue.



Section 5 Common Client Forms

- Client Relationships and Contacts
- Client Group Registration
- Consent Forms
- PSC-35
- ICC Eligibility Form
- Transfer/Discharge Form
- SUD Admissions Bundle
- Frequently Used Forms for MH
- Deleting Forms in Avatar

Client Relationships and Contacts

23. Forms to Use to Store Client Contacts and Relationships in Avatar

There are two different forms that should be used to enter contact information for client contacts in Avatar, depending on whether your program is part of the SUD system or the MH system.



24. BHRS Client Relationships for Mental Health Clients

This form is non-episodic, meaning the same form gets updated regardless of which program the staff entering the data is from. Both SUD and MH have access to the contacts entered into this form.

This form is for documenting all client contacts needed in the course of treatment. Any contacts that should only be accessed by SUD staff should be entered into the SUD Client Relationship form, NOT the BHRS Client Relationships form.

The form will open to the "Entry Date" tab where the date auto populates to today's date.

To view, add, edit, or delete contacts, click on the "Relationships" tab. Click Submit when you are done with the form.



25. SUD Client Relationship for SUD Clients

This form is episodic, meaning you must select an episode before opening the form. MH providers are NOT able to see records entered into this form.

If you see this screen on the right, it means some contacts have already been entered into this episode and you can proceed to add a new contact by clicking "add." To activate the edit or delete options, you must first click on an existing contact.

	Opening: SUD Client Relationship	
Home > Select Client > Select Episode > Select Record >		
Selected Client : TEST, JOLLY T JR (000938760) Selected Episode: 102		
Select Record Name: JOLLY T JR TEST ID: 938760 Sec: Male Date of Birth: 12/20/1960		
Last Name / Agency Name 🗘	First Name 🗘	Type of Relationship 💲
Bob Bob from Bob's CM		Case Manager
Malia	ouria	
Add Est Delete	Add Edit	Delete

If the window above does not appear and you are taken directly into the form, that means no contacts exist yet in this episode. You may proceed to enter the new contact directly into the form and submit when done.

SUD CLIENT RELATIONSHIP			S	Submit	Backup	Discard	Add to Fa
Client Relationship	~						
	Information is ONLY viewable by AOD Providers						
	THIS OPTION IS FOR DOCUMENTING ALL CONTACTS RELATED TO A CLIENT NEEDED IN THE CO	URSE OF TREATMENT					
		Other Palationship					
	Type of Relationship *	Other Relationship					
	Select	×					
	Last Name / Agency Name *	Home Phone					
	First Name	Cell Phone					
	Address - Street	Work Phone					

Client Group Registration in Avatar

26. Creating a New Client Group in Avatar

For all BHRS Staff who run groups, you MUST register any group. This includes groups with a set list of potential attendees and drop-in groups. If it is a drop-in group and you do not know who will be members of the group, you can save the group registration form without adding members.

Group Registration Form

The Group Registration form is utilized to register a series of group therapy sessions in Avatar. After utilizing the Group Registration form to register the Group Name and Group Registration Date, clients can be assigned to the group. *Please note that a client must have an open episode in order to be registered for a group.

Menu Path: Avatar PM/Appointment Scheduling/Group Management/Group Registration (Alternatively you can utilize the search box to locate the form)



Select Group Screen

When you open the Group Registration form, the first screen you will see is the Select Group screen. This screen is used to register a new group or edit an existing group.

*Please note that groups with similar names may appear in the Select Group list at the bottom of the page. Make sure that your new group name does not already exist before you register the new group.

To Create a New Group

- 1) Enable the New Group button by typing any letter into the search bar (the button will be grayed out before this step).
- 2) Select the New Group button.
- 3) Click "Yes" to Auto Assign Next ID Number for the group.

me > Select Group >	
lect Group	
Q mindful	
Results	
MINDFULLNESS (000233)	
MINUP OLEMESS (000233)	
OK New Group Can	cel

Select Group			
Q			
	?	Group uto Assign Next ID Number? Yes No	

Group Registration Tab

4) Complete the fields on the "Group Registration" tab on the form (see below)

Group Name: Enter a unique name to identify the group, that includes the clinic/program providing the group and the subject of the group (e.g. PV-SBMH Social Skills Building Group)

*Providing a unique group name will help to differentiate this specific group from other groups that are already registered in Avatar.

Group Registration: Date the group is created.



Is this Group a Family?: In most cases, a "No" response should be selected. While Avatar allows for family members to be registered as a group, this option would only be selected if all the family members participating in the group are BHRS (including contract agencies) clients.

Group Description: A brief description of the group (e.g. focus of group, planned content, facilitators, etc.)

Group Capacity: The maximum number of members in the group (e.g., If "12" is entered, this means that the group will have a maximum of 12 members). This field can be left blank if there is no maximum number of participants that you want to specify.

Associated Group: If the new group you are registering is associated with another group that is already registered in Avatar, choose the associated group from the list. If the group that you are registering is not associated with another group, then you can skip this step..

Group Member Assignment Tab

After entering the group name and registration date, the Group Member Assignment tab is used to assign members to the group (see tab on lefthand side, circled in red below).

Complete the fields on the Group Member Assignment tab on the form (see below for additional information).



Click on: "Add New Item"

Client: Fill in the client's name *A client must have an active episode to be added as a group member.

Episode Number: Choose the Episode of the program under which the client is open.

Group Assignment Start Date: Add the start date for the group.

Group Assignment End Date: Add the end date for the group.

Click "Ok" to notification that states "Future date entered."

Repeat the steps above to add additional clients in the group

Click "Submit" to save the information (see button circled in red below)

W APPOINTMENT GROUP FILE (314)				-	
OUP REGISTRATION					Submit Add
oup Registration	Client	Episode Number	Group Assignment Start Date	Group Assignment End Date	a support Date
Sub-Section 1	TEST.JOLLY T (938760)	84	04/09/2024	04/09/2025	04/09/2024
ine Documentation	TEST, TESTY (1016891)	7	04/09/2024	04/09/2025	04/09/2024
and bocumentation	TESTONE, TEST V MR (930000)	1	04/09/2024	04/09/2025	04/09/2024
					04/09/2024
		Add New Ite	m Edit Selected Item	Delete Selected Item	
	Client *	Add New Ite	m Edit Selected Item Group Assignm	Delete Selected Item	
	Clert *	Add New Ite	m Edit Selected hem Group Assignm	Delete Selected Item	• • • •
	Client *	Add New Ite	m Edit Solucted hem Group Assignm	Delete Salected Item	• 6 9;
	Client * 1 Episode Number Select	Add New Ite	m Edit Selected hem Group Assignt Group Assignt	Delete Selected Item	• C C;
	Client * 1 Episode Number Select	Add New Ite	m Edit Solveted hem Group Assignm Croup Assignm	Delete Selected Ram	• C C;

27. How Do I Edit Client Information for a Group?

Editing a Client

To edit a registered client's information, select/highlight the client's name and select the "Edit Selected Item" button.

Click "Ok" the pop-up notification that states: "Filing any edits to group information may leave existing appointments with invalid information."

Click "Submit" after making any changes.

28. How Do I Generate a Group Registration List in Avatar?

Group Member Listing Form

A listing of all group members can be viewed in Avatar under the Group Member Listing report. This is NOT a participant list – a participant list is a list of group members that attended a particular session. The Group Member Listing is the full list of clients registered to the group and is not tied to actual attendance for a particular session.

Menu Path: (Avatar PM/Appointment Scheduling/Group Management/Group Member Listing (Alternatively you can use the search bar to locate the report).



To view members of a specific group, select "Individual" group, enter the name of the group into the Group field and enter the start and end dates for the group (if you aren't sure of the dates, enter an approximate start and end date when the group took place). Select the "Process" button to generate the report

GROUP MEMBER LISTING			\sim	Process Discard Add to Favorites
Group Member Listing	- ·			
Online Documentation	Individual Or All Groups *		Start Date *	
		Individual	04/09/2024	
	Group *		End Date *	
	ext		04/09/2024	
	Results			
	PV-SBMH Social Skill Buildin	ng Group (314)		
		н « 1 » н		

Here is a view of the Group Member Listing report that is generated by Avatar:

Documentation Clinical Design Team View	Customize OFF 🛃
🖲 Group Member Listing	
	GROUP MEMBER LISTING Close
Page No: 1 SAN MATEO COUNTY BHRS Run Date: 09/16/2024 2000 ALM/EDA DE LAS PULGAS SUITE 280 San Mateo, CA 94403 * Group Hember Listing * Group ID#: 000314 Group Name: FV-SBMH Social skill Building Group Start Date: 04/09/2024 Ho Date: 09/16/2024 Assignment Assignment Actual Client Name Client ID Episode Start Date End Date Assgn Date	
TEST,JOLLY T 000938760 84 04/09/2024 04/09/2025 04/09/2024 TEST,TESTY 00101651 7 04/09/2024 04/09/2025 04/09/2024 TESTOME,TEST V HR 000930000 1 04/09/2024 04/09/2025 04/09/2024	
View Search PDF Config: Netsmart Suggested Page: Zoom: 100	0% V Print Page Export Page

Consent Forms

29. Where can I find consent forms for clients?

Consent forms come in either two forms – as hard copies scanned into Avatar or as electronic versions that are entered directly into an Avatar form.

To the right are the names of the current forms in Avatar that staff should use to record client's consents in an electronic format. The "Clinical Consent Retraction" form should be used when an existing consent needs to be retracted.

Please note that it is not required for consent forms to be completed via the Clinical Consent forms. PDF versions of the forms may continue to be printed out and scanned into Avatar.

Clinical Medication Consent

Clinical Consent Forms

Clinical Consent Retraction

To view already completed consent tracking widgets in Avatar, use the consent widgets that are available in your Clinical/Medical/Admin view tabs.

The Admin Paper Consent Tracking widget includes the consent forms that have been scanned into Avatar.

The **Clinical Consent Forms Tracking** widget includes the consent forms that were completed directly in Avatar using the Clinical Consent forms.

		ADMIN PAPER CON	NSENT T	RACKING								6.2
		Patient Name TEST, JOLLY T ST, JOLLY T TEST, JOLLY T	Consen Consen Treatme Medicat	nt_Type t to Release Information ent Consent tion Consent ne Arreement	Retracted Date	Release for Name/Age Edgewood	ncy F	Release for In AOD programs 04 08 08	itial Date of Consent 1/22/2021 1/23/2018 1/24/2018 1/09/2022	Restricted Sta	atus Cor 04/	15ent Exp Date 21/2024
۵	Admin Paper Consent Tracking	TEST, JOLLY T TEST, JOLLY T	Consen Medicat	t to Electronic Communications tion Consent				02 03 07	7/07/2022 8/18/2023 7/25/2019	Yes	02/	01/2000
	Clinical Concert Forms	CLINICAL CONSEN	T FORM	S TRACKING								C 3
D	Tracking	Patient Name		Consent_Type			Retracted Date	Release for Name/Agency	Release for	Initial Date of Consent	Restricted Status	Consent Exp Date
)	RUJJELL,CHARL	ENE L	Release of Information				Anthony IHSS Staff	Coordinating Services/Referrals	10/19/2022		10/19/2025
		WAN,KELLY		Release of Information				Ashley Burns / Brilliant Corners	Coordinating Services/Referrals	08/14/2023		08/14/2026
		TEST, JOLLY T TEST, JOLLY T		Consent to Treatment Cell Phone Agreement						12/20/2022 12/16/2022		

Alternatively, you can use the Forms widget and Console Widget Viewer which are both located in the Documentation view tab to scroll through individual Clinical Consent Forms. You can filter by clicking on the desired document on the forms menu or using the drop down menu in the "Form Description" column.

	TEST, JOLLY T (000938	760)						
FORMS	TEST,JO	OLLY T (0009387)	60)	Ep: -	om Pr	Location	1: I. Alert QM of billable diagnosis. Allergies (17)	3
AC OK COD for Adolescents / TAY AC OK COD for Adults Adult Assessment Addendum ADULT Initial Assessment v2 ADULT Reassessment v2	Ht: 3'4	1.0", Wt: 200 lbs, E	BMI: 87.9	DX P	en r;- :-	Adm. Pra	act:- 2. STOP - THIS IS A STAND ALONE PT. 2) PENICILLINS (CLASS) - Active 3) ATORVASTATIN - Active 4) CODEINE - Active 5) AMOXICILLIN - Active	
AIMS (Abnormal Involuntary	CUNICIAN					C C		ß
Movement Scale) Append Progress Notes BHRS Client Relationships	Forms Scanned [Documents					Clinical Consent Forms ×	
Child and Adolescent Needs and Strengths Client Treatment and Recovery Plan Client Treatment Plan Addendum	Form Description 🗢	Episode 🗢	Date 🗢	Time ¢	Data Entry By 🗢	Workflow Status ¢	<u>Consents</u> Is this a Release of Information?: Yes	Â
Clinical Consent Forms	Clinical Cons 🗸	ALL 🗸	ALL 🗸	A ~	ALL ~	A ~	Consent Form(s): Release of Information	
Clinical Medication Consent Columbia Suicide Risk Assessment	Clinical Consent Forms	-	08/14/2023	-	SAMANTHA ELIZABETH VIGIL	Final	Was this contact in English ?: Yes	
Day Treatment Daily Note Day Treatment Weekly Summary	Clinical Consent Forms	-	04/13/2023	-	ANNINA LEE ALTOMARI	Final	Language for Printed Version (If language is not available for selected consent type, select English) : English	
GAD 7 ICI Contacts Note Initial Contact Information	Clinical Consent Forms		04/13/2023	-	ERI TSUJII	Final	This provider reviewed this consent form with the Client or	
Medication Administration Record Mental Health Progress Note	Clinical Consent Forms		03/18/2023	-	ANNINA LEE ALTOMARI	Final	Parent/Guardian/Representative : by phone	
NOABD Letter Patient Health Questionnaire-9	Clinical Consent Forms	-	01/12/2023	-	ANNINA LEE ALTOMARI	Final	Person authorizing consent: Client	
Request SUD Progress Note	Clinical Consent Forms	-	01/03/2023	-	ANNINA LEE ALTOMARI	Final	08/14/2023	
Update Client Data URGENT CARE PLAN	Clinical Consent Forms		12/20/2022	-	ANNINA LEE ALTOMARI	Final	The Client or Parent/ Guardian/ Representative authorized/approved this consent by? (If verbal consent ? include	
Youth Assessment Addendum YOUTH Initial Assessment v2	Clinical Consent	_	12/16/2022		ANNINA LEE	Final	reason in General Comment box) : Verbal consent	
YOUTH Reassessment v2	Form Specific Pre	Display	М	• 1	•	22 of 22 rows	The Client/Parent or Guardian was offered copy of this form:	
SCANNED DOCUMENTS							Declined copy	-
26.5 Consent to Assessmnt Plan (PV		Open	New Record +		Clear Filters		Open Record Close All Print - Launch Report	

PSC-35

30. How do I find the PSC-35?

Add the "Generic Access" widget to access the PSC-35 (see screenshot below).

*Note that if you do not have a client selected when you open the Generic Access widget, the widget will be blank.



If you do not know how to add a widget, please see the Customizing Your Views section of this document.

ICC Eligibilty Form

31. How do I find the ICC Eligibility Form in Avatar?

Search for "ICC" in Avatar NX and click on "Eligibility Screening Form for ICC Services." Then select the episode and complete the form. For more detailed instructions, see the following resources:

- ICC IHBS TFC Training for Clinicians
- Instructions: SMC ICC Eligibility Screening Form on AVATAR
- <u>Recorded Instructions:</u> SMC ICC Eligibility Screening Form on AVATAR

LTEST, JOLLY T JR (1 🔹				
A TEST, JOLLY T JR (000938760)				
TEST, JOLLY T JR (000938760) M, 64, 12/20/1960 Ht: 5' 11.2'', Wt: 250 lbs, BMI: 34.	Ep: 104 : 410303 CENTRAL YOUTH TEAM Problem P: Depressed affect 7 DX P: 099.344 Majorjdepressive disorder aff	Location: NOT HOMELESS, Anatone, WA Attn. Pract.: - Adm. Pract.: TEST TEST01	 1. Alert QM of billable diagnosis. 2. STOP - THIS IS A STAND ALONE EPISO 3. HIGH PRIORITY-Please review the Uc 	Allergies (12) Allergies Reviewed-Yes (02/21/2024) 1) TYLENOL - Active 2) PENICILLINS (ICASS) - Active 3) ATORVASTATIN - Active 4) CODEINE - Active -: MAGREGIUM
ELIGIBILITY SCREENING FORM ICC S	ERVICES		Draft Submit Discard	Send To Do Add to Favorites
ICC Services	~			
	Client Name	Phone		
	TEST, JOLLY T JR			
	Gender	A Date Of Birth		
	Male-to-Female (MTE)/Transgender Female/Trans Woman	12/20/1960		
	Female-to-Male (FTM)/Transgender Male/Trans Man	Screening Type		
	Genderqueer, neither exclusively male nor female Female	New	⊖ Update	
	Male Chose not to disclose Additional gender category or other, please specify	Medi-Cal #		
	Pronouns	v		
		Issue Date		
	Address			
		Race/Ethnicity		
	Languages	Unknown/ Not Rep	ported	× ×
	Select	× ~		
		Relationship		A
	Parent/Guardian Name	Aunt	Adoptive Father	
		Adoptive Mothe	er Attorney/Lawyer	
	Languages			*
	Select	x ~		
	Preset/Cuerdian Name	Relationship		A
			Adoptive Father	

Transfer / Discharge Request Form

32. How do I fill out the Transfer / Discharge Request Form? When should I use it?

All programs using Avatar for clinical documentation should complete the "Transfer/Discharge Request" form when discharging or transferring a client to a different program or delivery system. The Transfer / Discharge Request does not need to be filled out for client transfers within a program (e.g., client is transferring from one North County Adult clinician to a different North County Adult clinician).

Steps to Follow to Complete the form:

Recent Clients		O What can Uh	oln vou fi	nd2			
My Forms		Advanced Client S	Search				
Avatar PM	Þ						
Avatar CWS	+	Assessments	×				
Avatar MSO	•	Consents	Þ				
		Progress Notes	►				
TEST IOUXT IR	<	Treatment Planning		July 2024			
ID#: 938760		Reports	+	ue	Wed	Thu	
TEST, JOLLY T JR ID#: 938760		Other Chart Entry	•	Authorizat	tions and Referrals	•	
		Contractor Document Entry	+	Medical		+	
		Document Management	•<	Transfer/I	Discharge Request 🗲	Ľ	
		Results	+	Update Cli	ient Data	Ľ	
			- ×	PRE ADMI	T Group Attendance	Ľ	
1) Locato the Transfor/Di	cebargo P	aquast form in Avatar by:		O.D. / W.I.	C.C. Contacts	Ľ	
I) Locate the mansier/Di	scharge K	equest form in Avatar by:		ICI Contac	ts Note	Ľ	
a) Typing "Transfer/D	Discharge	Request" in the search		PRE ADMI	T Caseload Assignment	Ľ	
bar, or			+	URGENT	ARE PLAN	Ľ	
				Client Aler	ts	Ľ	
b) Using the "IVIY Fori	ms" menu	on the left side of your	a To Do	URGENT	ARE PLAN Bundle	Ľ	
screen:			4 10 00	Total Well	ness SID	Ľ	
My Forms 🕨 Other	r Chart Ent	try 🕨 Transfer/Discharge		Total Well	ness Bundle	Ľ	
Request		_					

ß		Opening: Trans	sfer/Discharge Request				
Home > Select Client > Select Episode >							
Selected Client : TEST, JOLLY T JR (000938760)							
Select Episode							
Name: JOLLYT JR TEST ID: 938760 Sex: Male Date of Birth: 12/20/1960							
Episode 🖨	Program 🖨		Start 🖨			End A	
96	992020 AOT LAURA'S LAW		06/03/2024				
95	410308 QUALIFIED INDIVIDUAL FFPSA		05/12/2024		2)	Click on the onic	ada from which the client is
94	41BA04 TELECARE MOBILE CRISIS TEAM	М	05/08/2024		2)	Click on the epis	ode from which the client is
93	41BA04 TELECARE MOBILE CRISIS TEA	М	05/07/2024			being transferre	d/discharged. Then click "Ok."
92	41BA04 TELECARE MOBILE CRISIS TEA	М	05/07/2024				
91	41BA04 TELECARE MOBILE CRISIS TEA	М	05/02/2024				
90	41BH02 ACCESS CALL CENTER INTAKE		03/19/2024				
89	41BH02 ACCESS CALL CENTER INTAKE		12/20/2023			01/25/2024	
88	AD4110DUI FREE AT LAST DUI		08/01/2023				
87	41BH02 ACCESS CALL CENTER INTAKE		06/01/2023			06/01/2023	
TEST, JOLLY T (000938760) F, 63, 12/20/60 Ht: 5' 11.2", Wt: 250 lbs, BMI: 34.7		Ep: 90 : 418H02 ACCESS C/ Problem P: Depressed affec DX P: -	all center intake t		Location: HON Attn. Pract.: - Adm. Pract.: J	ieless, daly city, ca Ocelyn R cerda-garcia	
TRANSFER/DISCHARGE REQUEST							
Transfer / Discharge Request Supervisor Authorization Status Receiving Clinic Approval Status Notify	V Type of Request *			3)	Select	either "Transfer"	or Discharge from the "Type of
DX from Assess. ADULT DX from Assess. YOUTH	O Discharge		Transfer		neque		suprete an other required netus.
	Transfer To *						
	North County Adult						
	Current Treatment Informati	on and Alerts		idaati	+h a -1) client was the	
	weeks of medication.	zea on 7/10/24 due to	o vanger to self (suicidal	ideation Wi	th a plan). Client was dis	

TEST.JOLLYT (200938760) TEST.SULYT (200938760) TEST.SULYT (200938760) E.S. DO2000 I.S. D.DO200 I.S. SULYT (200938760)	Backup Discard	3) ATORVASTATIN - Active 4) CODEINE - Active 5 AMONICIUM Send To Do Add to Favorite	24 бауула. А 57400 4.046 (950 ЭТАТИО И. Ал. ЭТАТИО И. Ал. ЭТАТИО И. Ал. ЭТАТИО И. Ал. ЭТАТИО И. Ал. ЭТАТИО И. Ал.
TRANSFER/DISCHARGE REQUEST			Discard Send To Do
Transfer / Discharge Request Supervisor Authorization Status Receiving Clinic Approval Status Notify			
DK from Assess, YOUTH	weeks of medication. Tansfer/Discharge Reason Client called the Access call center to request an indiv Adult clinic on 7/22/24 with clinician A. I	idual therapist and psychiatrist. Access Call Center staff scheduled an intake appointm	orts that he was only given two
	Requested By *	Date of Request *	
		07/22/2024	
	If you want to change the diagnosis from the last assessment, where the Once the assessment form opens, select 'Update' on the Assessment Ty Update Diagnosis Adult	4) To notify your supervisor a of the transfer request: Cli button on the top right har	and/or the receiving clinician ick on the "Send to Do" nd side of your screen.
		(*Please note that the "No	tify" tab has been replaced by

the "Send to Do" button)

See <u>"Send To Do" Section</u> of this Guide for instructions on how to use the embedded "Send To Do" function.

SUD Admissions Bundle (Only for SUD)

33. How do I Complete the "SUD Admission Bundle IPS Episode"?

1. Search for SUD Admission Bundle:

Q	sud admission bundle	
	Advanced Client Search	
	Here is what I round:	×
on:		
	Forms	
oday		
Мо	SUD Admission SUD Admission Bundle (IPS)	_

2. Enter Client Information (This screen will not appear if you already had the client's chart open):

Cli	ent Sea	irch									
Γ	Last Nar Test	ne	First N Jolly	lame /		Sex Male	×	~		Either th	e first name
	Social Se	curity Number I ID (MR#) Search	Clear	of Birth						and/or las the sex n out to e "Search	at name AND hust be filled enable the " function.
	Info	Score	Name	ID	Date Of Birth	So: Nu	cial Security mber	Client's Hor Phone	ne	Alias	Family Number
	Info	75	TEST, JOLLY T JR	938760	12/20/1960	000)-00-0002	650-123-45	57	TEST, JOHN	
	List of Potential Clients. If none are the client you are looking for, click "New Client."										

3. Click New Client to generate a AVATAR ID #. Click "Yes"



4. Fill out as much information as possible for the IPS Episode. All fields in red are mandatory.

 NEW Client 						
, (00103009 - Ht: -, Wt: -,	4) BM1: -	Ep: 1 : Problem P: - DX P: -	Location: - Attn. Pract.: - Adm. Pract.: -		Allergies (0) 🛛 🗹	
ADMISSION (OUTPATI	ENT)			Submit	Discard	
Admission Demographics Other Client Data	Episode Number *		Primary Therapist / Counselor *	0		
Online Documentation			Primary Psychiatrist / Supervisor	Q	In IPS there 1. Adu	e are 3 TABS: mission
	Sex * Female Other	Make sure to fill out required fields in al	all the plant	(1)	2. Der 3. Oth Only Admis	mographics ner Client Data ssion has red fields, but SUD
	Date Of Birth	iii () ()	Social Security Number *		encourage informatio easier for a	s contractors to always enter as much n as possible – in the end it makes life all.

5. Click "Submit"

	Ep: 1 : Problem P: - DX P: -	Location: - Attn. Pract.: - Adm. Pract.: -	Submit	Allergies (0) Discard	ď
de Number *		Primary Therapist / Counselor * 🖗		٩	Î

6. After Submitting, you will be see the SUD Initial Contact Information (this is the SUD screening)

SUD INITIAL CONTACT IN	FORMATION		🥒 Draft	Submit Discard	Add to Favorites
Request Information Substance Use Screening	~				
DIMENSION 1.	Date of Original Request *		Status *		
WITHDRAWAL/DETOXIF					
POTENTIAL			Oraft	Final	
DIMENSION 2.					
CONDITIONS AND	Time of Original Request *		Name of Requestor *		
COMPLICATIONS					
DIMENSION 3.		• • •	Requestor's Relationship to	Client	
EMOTIONAL/BEHAVIOF			Select		* ~
CONDITIONS AND	Service Requested *		001001		
COMPLICATIONS	Service nequested				
DIMENSION 4.		Medication Support			
CHANGE	AOD	Other			
DIMENSION 5.	O AOD RTX	Eating D/O			
RELAPSE/CONTINUED	O Psychological Testing				
USE POTENTIAL					
DIMENSION 6.					
RECOVERY					

7. Click "Submit"


8. After submitting, you will see the SUD Initial Referral

SUD INITIAL REFERRAL			Submit Backup	Discard
Initial Referral	~			
	Initial Referral Date *		Initial Referral Action	
	02/20/2024			
	Initial Referral Time *		Initial Referral Assessment Type *	
			 Initial Contact Assessment 	
	Initial Referral Assessment Data			
				2
	Is Referral Urgent? *			
			Referral Level of Care *	
		0	O Intensive Outpatient	
	Has Medi-Cal Been Verified? *		MAT (Naltrexone, Vivitrol, Suboxone, e NRT (Methadone, Suboxone)	etc

(The above is only a partial view of the IPS Referral form)

9. Click "Submit" and you are done.



Frequently Used Forms for MH Clinical Staff

34. Which forms have Pre-CalAIM and CalAIM Versions?

The table below lists which forms and reports to use based on when the form was last submitted.

Document Type	Notes	CalAIM Versions	Pre-CalAIM Versions
Assessment Forms	For any assessments submitted on or after 12/16/2024:	 CalAIM Adult Assessment Bundle (includes Diagnosis Form) 	The "V2" versions of the Adult and Youth Initial/Reassessment/Addendums have all been retired and are no longer available as of
	be used when completing an Initial Assessment, Reassessment, or Update	 CalAIM Youth Assessment Bundle (includes Diagnosis Form) 	12/16/2024.
	the Diagnosis.	CalAIM Adult Assessment Form	
		CalAIM Youth Assessment Form	
Assessment Reports	For assessments updates submittedsbefore 12/16/2024, use the Pre-CalAIM	CalAIM Adult Assessment Report	PreCalAIM Adult Assessments Report
	versions of the Assessment reports. For assessments submitted on or after	 CalAIM Youth Assessment Report 	PreCalAIM Youth Assessments Report
	12/16/2024 , use the CalAIM Version of the reports. Diagnosis for the clients will need to be printed out separately using the CalAIM Dx Report.	CalAIM IEP Report	PreCalAIM IEP Report
Diagnosis Forms and	For any assessments and diagnosis updates submitted on or after	 Diagnosis Form 	Dx from PreCalAIM Adult Assessment Rpt
Reports	12/16/2024: The Assessment Bundle (which includes the Diagnosis form) MUST be used to enter all diagnoses 12/16/2024 and onward.	 CalAIM Dx Report Current – Use to see the most recent diagnoses entered for the client. 	Dx from PreCalAIM Youth Assessment Rpt
		CalAIM Dx Report Historical	These PreCalAIM DX reports pull the dx that was included in the last PreCalAIM Assessment that was completed prior to 12/16/24.

35. Do all forms and reports now have Pre-CalAIM and CalAIM versions?

No. Some forms have remained the same and some were updated but did not require Pre-CalAIM and CalAIM versions. The forms below do not have Pre-CalAIM vs. CalAIM versions. The forms and reports listed below may be used regardless of when the forms or reports were submitted.

Document Type	Name	
Additional Assessment / Screening	Child and Adolescent Needs and Strengths	◆ GAD 7
	 PSC-35 (available with Generic Access widget) 	 Columbia Suicide Risk Assessment
	ICC Eligibility Form	•
Progress Note Forms	 Mental Health Progress Note 	 Progress Note Error Correction Request
	 Append Progress Note 	 Medication Administration Record
Progress Note Reports	Progress Notes Report by Client	Progress Notes Report by Clinician
	Independent Progress Note Report – This is a new r	eport to view independent notes. Not for Chart Release.
Treatment Plan Forms	 Client Treatment and Recovery Plan 	Client Treatment Plan Addendum
Treatment Plan Reports	Client Treatment Plan V2 Report	
Consent Forms	 Clinical Consent Forms 	 Clinical Consent Retraction
	Clinical Medication Consent	
Miscellaneous Forms	CSI Assessment	NOAB Letter
	Transfer/Discharge Request	Contact Log

Deleting Forms in Avatar

36. Oh no! I made a mistake and need to delete a form in Avatar.

In general, most forms in Avatar cannot be deleted, especially if they have been finalized. Below is a general guide of what to do if you want to correct an error in a finalized document in Avatar.

	Progress Note	Assessment	Treatment Plan	Avatar Consent	
Grammatical / Minor Errors in Form	Leave as is.	Leave as is.	Leave as is.	Leave as is.	
Forgot to include information.	Use "Append Progress Notes" form to add information.	Use CalAIM Assessment form and select "Update" to add information. Use "Client Treat Plan Addendum" to add information		Contact QM.	
Included information that should not have been included.	on that should not d. Contact QM. Contact		Contact QM.	Contact QM.	
Put in the wrong date.	Use "Progress Note Error Correction Request" form.	Contact QM.	Contact QM.	Contact QM.	
Entered incorrect info in progress note fields (e.g. service code/time, location code, etc NOT narrative field)	Use "Progress Note Error Correction Request" form.	N/A	N/A	N/A	
Submitted a form for something that did not happen (e.g., marked wrong consent form).	Contact QM.	Contact QM.	Contact QM.	Contact QM.	
Accidentally created extra draft of a form.	Use " <u>Delete Draft Progress</u> <u>Note</u> " button on the note.	Use Delete button. See instructions in <u>here</u> .	Leave as is. Note error in progress note.	Leave as is. Note error in progress note.	
Wrong client.	Contact QM.	Contact QM.	Contact QM.	Contact QM.	
Wrong episode.	Contact QM.	Leave as is. Note error in progress note.	Contact QM.	N/A	

* "Contact QM" does not guarantee that form will be deleted. It means that QM will review your request and determine if the form can or cannot be deleted based on the information provided.

Updated: 4/3/2025

Section 6 Assessments (MH) and Diagnoses (MH and SUD)

- Important Note About Mental Health Assessments and Diagnoses
- Viewing and Printing MH Assessments
- Deleting Draft MH Assessments
- Using the Diagnosis Form (MH and SUD)
- Viewing and Printing Diagnoses (MH and SUD)

Important Notice about Mental Health Assessments and Diagnoses

Reference the updated "Frequently Used Forms for MH" Section for a complete list of the new Assessment and Diagnosis Forms and Report names.

37. The new CalAIM Assessment form is now available. Can I finalize a draft assessment that was created using the old Pre-CalAIM (Assessment V2) version of the Assessment form?

No. If you attempt to open the old draft using the new CalAIM form you will notice that much of the data is missing and you will not be able to verify or edit any information that does not appear on the new form. **Therefore, you should leave this assessment in draft.**

If you need to view the contents of the form, you may use the "PreCalAIM" versions of the assessment reports. If you see that the client does not have a current assessment in place because the old assessment was not finalized, then you should create a brand new assessment using the CalAIM version of the assessment form and document your completion of the assessment in a progress note. Again, after 12/9/2024, do NOT finalize versions of the assessment that were created using the old Pre-CalAIM form.

38. Diagnoses Are Not Embedded in the new CalAIM Assessment forms!

Before CalAIM, the diagnoses that were entered directly into the assessment form could be directly attached to all claims. However, this is no longer possible in Avatar, which means that diagnoses will have to also be entered separately through the Diagnosis Form for it to be properly attached to claims that get sent to Medi-Cal. This means that staff should make sure that the diagnosis that is entered into the free text field in the **CalAIM Assessment Form** matches what is entered into the **Diagnosis Form**.



* Because the Diagnosis Form cannot be routed for co-signature, **staff who require co-signature** should get the assessment co-signed first before filling out the Diagnosis Form. In these cases, staff who require a co-signature will need to open the Diagnosis form separately after the assessment is co-signed to enter the diagnoses from the assessment into the Diagnosis form.

39. Can you show me the two places I'm supposed to enter diagnoses?

The first place where you will be documenting the diagnosis is in the "Diagnosis Information" box in final Domain of the CalAIM Assessment. This is the section right before you finalize the assessment in Avatar.



May ONLY be completed by Licenced/Waivered- MD/NP, MFT/LCSW/ASW, Psy(PhD/PyD), RN w/Psych MS, or Trainee w/co-signature
Diagnosis Information (include any diagnoses or rule out diagnoses, etc.)
This box replaces what used to be the individual boxes for each diagnosis that was in the old
assessment form.
This is where you list the Mental Health Diagnoses and Z-Codes you are giving the client.
Remember to add the diagnoses that you type here into the Diagnosis Form, too.
Clinical Formulation / Summary (Including Current Presenting Issues, Course of Treatment, Impairments, Diagnostic Criteria, and Strengths)
The clinical formulation should still include how the client's presentation / symptoms
meet diagnostic criteria for the diagnoses you listed in the above "Diagnosis
Information" box above.

The second place is on the first page of the Diagnosis form. You do not need to complete the "Additional Diagnosis Information" Tab section on the Diagnosis Form.



Diagnosis	✓ DX					
DX Type/Date/Time DX Default	Diagnose	25				
Diagnosis Comments Problem List	Index	Ranking 🗘	Description 🗘	Status 🗘	Estimated Onset Date $\ensuremath{\widehat{\bigcirc}}$	Classifica
dditional Diagnosis Information	1	Primary (1)	Posttraumatic stress disorder	Active (1)		
DX from PreCalAIM Adult Assessment DX from PreCalAIM Youth Assessment	2	Secondary (2)	Intermittent explosive disorder	Active (1)		

Updated: 4/3/2025

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Viewing and Printing Assessments

40. Is there a difference in Avatar in how I can view Pre-CalAIM assessments versus CalAIM Assessments?

YES! Due to how different the Pre-CalAIM and CalAIM Assessments are, we can only set the Console Widget "Launch Report" function to work with the new CalAIM Assessment report format. This means **you** <u>cannot</u> accurately view Pre-CalAIM Assessments using the "Launch Report" feature in the **Console Widget viewer.** However, the PreCalAIM Assessments are not lost. Staff just need to access the PreCalAIM Assessments using a different method (see next page for instructions).

Please also note that the Console Widget Viewer Preview box does NOT work for viewing any assessment (PreCalAIM or CalAIM). Follow the instructions on the next few pages for the proper way to view PreCalAIM and CalAIM Assessments.



Updated: 4/3/2025

Viewing Pre-CalAIM Assessments

"V2" Assessment forms Last Submitted in Avatar 12/8/2024 and Earlier

Step 1) Open your client's chart in Avatar NX

Step 2) Use the "Search" feature and type in either "PreCalAIM Adult Assessment Report" or "PreCalAIM Youth Assessment Report" or the "PreCalAIM IEP Assessment Report"

		TEST, JOLL	Y T (000938760)				
R All (5) Clients (0) Staff (0) Forms (5)							
м							
			FOIIIIS				
M	Undock	Name	Menu Option				
R	Ľ	PreCalAIM Adult Assessment Report	/ Avatar PM / Reports				
Co	Ľ	PreCalAIM Youth Assessment Report	/ Avatar PM / Reports				
Ċ	Ľ	PreCalAIM IEP Assessment Report	/ Avatar CWS / Reports / Assessment Reports / CHIL	D/YOUTH			
	57	DX from PreCalAIM Adult Assessment	/ Avatar CWS / Reports / Assessment Reports	_			

Step 3) Select the date range of the assessments you would like to view, then click "Process."

REPORT			Process	Discard	Add to Fa
~					
Client *		Specify The Assessment Date Range			
TEST,JOLLY T (938760)	٩	Start Date *			
					d Q
		End Date *			

Step 4) Use the "**Print**" button on the top left corner on the Pop Up report window to print.

Viewing CalAIM Assessments (Option 1)

Forms Submitted in Avatar beginning 12/9/2024 and Later

Option 1

Step 1) Open your client's chart in Avatar NX

Step 2) Use the "Search" feature and type in either "CalAIM Adult Assessment Report 12/16/24" or "CalAIM Youth Assessment Report 12/16/24" or "CalAIM IEP Assessment Report 12/16/24"

_						-	
a	calaim Advanced Clie	ent Search AC OK COD for Adolescents /	٩	calaim ie	ent Search		TEST, JOLLY T (000938 F, 63, 12/20/1960
-		Here is what					Here is what I f
F	All 13	Clients (0) Staff (1) Forms (12)	R				
				All 2	Clients 0 Staff 0	Forms 2	
		Forms	N	1			Forms
Ľ							101113
	Undock	Name	N				
L	Ľ	PreCalAIM Adult Assessment Report		Undock	Name		
	57	PreCalAIM Youth Assessment Report	R	<u>رم</u>	PreCalAIM IEP Assess	ment Renort	
	Ľ	CalAIM Adult Assessment Report 12/16/24	c	Ľ	CalAIM IEP Assessmen	nt Report 12/16/24	
1	Ľ	CalAIM Youth Assessment Report 12/16/24		-			

Step 3) Select the date range of the assessments you would like to view, then click "Process."

REPORT			Process	Discar	Add to Fa
✓ Client *		Specify The Assessment Date Range			
TEST,JOLLY T (938760)	٩	Start Date *		i	
		End Date *		i	

Step 4) Use the "Print" button on the top left corner on the Pop Up report window to print.

Viewing CalAIM Assessments (Option 2)

Forms Submitted in Avatar beginning 12/9/2024 and Later

Option 2

- Step 1) Open your client's chart in Avatar NX
- Step 2) Use the "Documentation" View Tab and click on the assessment you want to view, edit, or print and assessment.
- Step 3) Click "Launch Report" to view the full content of the assessment OR

Click "Open Record" if you want to view the assessment form or edit a CalAIM Assessment that is in draft.



41. What happens if I try to use something other than the PreCalAIM Assessment Reports to view PreCalAIM Assessments?

	Pre-CalAIM Forms Last Submitted in Avatar 12/8/2024 and Earlier
Can I Use the Console Widget Viewer?	No This is because the Console Widget function will only display items that correspond with the new CalAIM Assessment Forms and CalAIM Assessment Reports. It does not include fields that exist in the PreCalAIM form but are not included in the CalAIM form.
Can I View the Assessment using the "Launch Report" Button on the Console Widget Viewer?	No This is because the "Launch Report" function will only display items that correspond with the new CalAIM Assessment Forms. It does not include fields that exist in the PreCalAIM form but are not included in the CalAIM form.
Can I View the Assessment using the "Open Record" Button on the Console Widget Viewer?	No This is because the assessment form was converted to the new CalAIM format and will not display all fields that were present in the Pre-CalAIM version of the form. Therefore you would not be able to view or edit any fields from the PreCalAIM form that are not present in the CalAIM form. Additionally, even for the fields that are the same across the two versions, the old information might not populate correctly into the new form.
Can I view by opening the form in Avatar through a method other than the "Open Record" button?	No This is because the assessment form was converted to the new CalAIM format and will not display all fields that were present in the Pre-CalAIM version of the form. Therefore you would not be able to view or edit any fields from the PreCalAIM form that are not present in the CalAIM form. Additionally, even for the fields that are the same across the two versions, the old information might not populate correctly into the new form.
Can I view by running a report?	Yes But only with the "Pre CalAIM Adult Assessment Report" or "Pre CalAIM Youth Assessment Report." You will not see the full contents of the assessment if you try to use the CalAIM versions of the Assessment Reports.

Deleting Draft MH Assessments

42. Deleting Draft Assessments

Step 1: Select a client in Avatar

Step 2: Search for the assessment form name that you wish to delete.

Advanced Client Search	FORMS AC OK COD for Adolescents / TAY AC OK COD for Adults Adult Assessment Addendum Here is what I found:	TEST, JOLLY T JR (000938760) M, 63, 12/20/1960 Ht: 5' 11.2", Wt: 250 lbs, BMI: 34.7
	Forms	
• /		

Step 3: Addressing Pop Ups that might come up:

If you see this Pop Up, click "Ok"



If you see this Pop Up, click "No"



Assessment Type 🗘 Draft/Pending Approval/Final Initial Assessment (Clinician, Casemgr). Final Initial Assessment (Clinician, Casemgr). Draft ome > Initial Assessment (Clinician, Casemgr). ~ Select Draft Client : TEST, Selector Episode: 84 Select Re rd Name: JOLLY ID: 938760 JR TEST Sex: Male Assessment Date 🗘 Assessment Type 🗘 Data Entry By (Option) 🗘 Draft/Pending Approval/Final 🗘 03/08/2024 JOSEPH DEL AGUILA Initial Assessment (Clinician, Casemgr). Final 10/02/202 Draft TRAIN03.TR nitial Ass ent (Clinician, Casemg 08/14/2023 KEVIN WU Initial Assessment (Clinician, Casemgr). Draft Add Edit Delete Cancel

Step 4: Select the plan you want to delete. Remember, Final plans cannot be deleted. Avatar will only allow you to successfully delete a Draft.

Step 5: Confirm that you want to delete your selection by clicking "Yes"



Entering Diagnoses Into the Diagnosis Form (MH and SUD)

43. How do I enter Diagnoses into the Diagnosis form?

For clinical staff, when adding, updating, or editing a diagnosis, you MUST use one of the assessment bundles. The bundles include both:

- 1) The assessment form in which you would update any clinical information that contributed to the change in diagnosis
- 2) The diagnosis form in which you would enter the diagnosis and any additional comments related to the diagnosis.



DIAGNOSIS Yes! To do so, Add to Fa please follow the ✓ DX Type/Date/Time Diagnosis DX Type/Date/Time instructions here: Type Of Diagnosis * Show Active Only 🖓 DX Default DX Olischarge Diagnosis Comments Admission Onset **Update Yes No** Problem List Additional Diagnosis Information Date Of Diagnosis * Time Of Diagnosis * DX from PreCalAIM Adult Assessment Current Time H AM/PM DX from PreCalAIM Youth Assessment Online Documentation ✓ DX Default Select Episode To Default Diagnosis Information From Select Diagnosis Entry To Default Information From Select XV Select Q **~** Episode # dmit : 06/02/2012 Discharge : 05/28/2015 Program : Z006600 SIERRA VISTA IMD_07_20 Diagnosis Type: Update Date: 12/11/2024 Time: 12:43 PM Episode # 2 Admit : 11/01/2013 Discharge : 07/21/2015 Program : 416800 EAST BAYSHORE ADULT Diagnosis Type: Update Date: 12/11/2024 Time: 12:46 PM Episode # 3 Admit : 12/03/2013 Discharge : 05/12/2014 Program : 410101 NORTH COUNTY ADULT \$ D-10 C der Episode # 4 Admit : 09/01 If you would like to pre-populate from a previously completed Episode # 5 Admit : 08/0 diagnosis form, Enisode # Admit : 08/15 Episode # 7 Admit : 10/26 First select the episode, Enisoda # Then select the specific form.

44. Can I populate diagnoses that were previously submitted using the Diagnosis Form?

45. How do I edit a diagnosis?

Simply double click on the diagnosis you want to edit and then proceed to make the edits using the appropriate fields.



Error Message on Diagnosis Form (MH and SUD)

46. I'm getting an error message when I try to submit the diagnosis form! What do I do?

Some users might receive this error when attempting to submit the diagnosis form.



Don't worry! This just means that one or more of the diagnoses entered into the form had "Yes" marked under the "Add to Problem List" field. To fix this error, click on each diagnosis row and scroll down to the "Add to Problem List" field to make sure that "No" is selected. Once you check that each diagnosis is marked "No" then you should be able to submit the form with no problem!

DIAGNOSIS							Submit	Discard	Add to Favorites
Diagnosis	V DX								
DX Type/Date/Time DX Default									
DX	Diagnose	es							
Diagnosis Comments Problem List	Index	Ranking 🗘	Description 🗘	Status 🗘	Stimated Onset Date	Classification 🗘	Resolved Date 🗘	Bill Order 🗘	ICD-10 C
Additional Diagnosis Information	1	Primary (1)	Posttraumatic stress disorder	Active (1)					F43.10
DX from PreCalAIM Adult Assessment DX from PreCalAIM Youth Assessment	2	Secondary (2)	Intermittent explosive disorder	Active (1)				2	F63.81
	Diagnosi Posttrau	New Row Del s Search * Imatic stress disorde	ete Row		Diagnos TSWII,	ing Practitioner * ERI (053266)			Ŷ
	Problem List Add To Prob No Problem Class Select	t Nem List	Make sure ' BHRS has not y	'No" is se Problem I yet impler	lected in the List" field. nented the F	e "Add to Problem Lis	t. 💼 🛛 🖉	¢	

Submitting Diagnosis for Co-Signature (MH and SUD)

47. How do I submit a diagnosis for Co-signature?

Unfortunately, there is no way to submit a draft diagnosis for co-signature through the diagnosis form. If staff require a co-signature, they should ensure that their supervisor approves the assessment that was submitted for co-signature. The diagnoses that were included in the approved version of the assessment should then be entered into the Diagnosis form to ensure that the diagnosis gets attached to claims. See <u>this question and answer</u> to see what the diagnosis sections of these two forms look like.

Viewing and Printing Diagnoses (MH and SUD)

48. Is there a difference in Avatar in how I can view Pre-CalAIM diagnoses versus CalAIM diagnoses?

	Pre-CalAIM Forms Last Submitted in Avatar 12/8/2024 and Earlier	CalAIM Forms Submitted in Avatar Beginning 12/9/2024 and Later
Viewing a diagnosis associated with a specific assessment	Final versions of the assessments submitted prior to 12/16/2024 will include the diagnoses associated with each assessment. Use the " PreCalAIM Adult Assessment Report " and the " PreCalAIM Youth Assessment " Report to view old assessments and diagnoses.	The " CalAIM Dx Report Historical " will allow you to select the time range of the diagnosis you want to view. This will show all diagnoses inputted for that time range, not just the primary diagnosis.
Viewing the current (most recent) diagnosis.	The "Dx from PreCalAIM Adult Assessment Report" and "Dx from PreCalAIM Youth Assessment Report" will only pull the diagnosis from the last V2 (PreCalAIM) assessment that was submitted. It will not reflect diagnoses that were submitted after 12/16/2024.	The " CalAIM Dx Report Current " shows all current diagnoses (not just the primary diagnosis) entered by the most recent episode that submitted a diagnosis form.

Section 7 Progress Notes

- Navigating the Progress Note Form
- Same Day Same Service Progress Notes
- Co-Practitioners
- Add-On Codes in Progress Notes
- Viewing Progress Notes
- Printing Progress Notes
- Deleting Draft Progress Notes

Navigating the Progress Note

49. Selecting the episode for a progress note without scrolling

You can reduce the episodes that show in your drop down by typing in a search term in the episode field. Click the down arrow of the "Select Episode" field and a search bar will appear above the drop-down menu items.

In the example below, the term "east" was used to only show episodes that are from the "East Bayshore" program. You can see that the number of items in the dropdown went from 87 to just 2.

50. Where are the text templates for Progress Notes???

Click on this icon 🖹 to the right of the progress notes text box to get to the menu of available templates.

Select Episode *	-
Select	× 🗸
east	Q
Episode # 2 Admit : 11/01/2013 Discharge : 07/21/2015 Program : 416800 EAST BAYSHORE ADULT	
Episode # 22 Admit : 03/28/2017 Discharge : Nor Program : 416800 EAST BAYSHORE ADULT	ne



The templates in the **green box** are the templates that have been updated to meet CalAIM requirements. You may use these templates for any services that were provided on or after 7/1/2022 (yes, 2022, but hopefully you don't have any notes from that far back to write!!!).

BHRS has not yet provided guidance on the Treatment Plan Progress Note, so please wait* until we offer the Treatment Plan Progress Note training before using these templates.

*Note: Contract Agencies, if you have already been implementing the Treatment Plan Progress Note, please feel free to allow your providers to use the Treatment Plan Progress Note templates.

Same Day Same Service Progress Notes

51. Same Day Same Service Progress Notes

BHRS continues to experience issues with getting reimbursed for services that are provided on the same day for the same client using the same service code because they are not being documented in the same progress note. As a reminder...

Under Payment Reform, **all claims for individual services** provided to the same client that are provided under the same service code by the same provider on the same day MUST be combined into <u>one progress note</u>.

Group services may be documented in separate notes – Groups that are offered on the same day to the same client by the same provider do not need to be bundled into the same note.

Staff should leave notes in DRAFT and wait to finalize until the end of the day. Notes should be finalized within 3 days of the service.

If you finalized a note and realize you provided an additional service after finalizing the note, you will need to complete TWO forms in Avatar to correct this error:

- 1) Append Progress Note: Use this to add the narrative content to the note documenting the additional service you provided.
- 2) Progress Note Error Correction Request: Use this to add the minutes and/or any additional add on or prolonged service codes that will need to be added. Please see image below for how to fill out the form.

Please be advised that staff should get into the practice of leaving notes in draft to finalize later (within 3 business days) because of the burden it places on staff to fill out two forms to correct the error. Additionally, the correction process requires our billing department to stretch their resources to process these progress note error corrections.

52. Location Code keeps defaulting to OFFICE!

PROGRESS NOTE ERROR CORRECTION REQUEST Original Note Information (Enter Date of Service to Search MM/DD/YYYY) Select This When Requesting Jul 13 2023 -17CA-MEDICATION SUPPORT - LOC-OFFICE -67 mins by NOTE ID NOT66668.004. Ju Change to Add-On Code Select Items to Change * Service Code Location # of Clients in Group Service Time Client Present in Person Other Billable Service Time Date of Service Wrong Client Other Client's PHI Disclosure Wrong Episode Wrong Co-Practitioner Duplicate Entry Other NEW Date of Service NEW Other Billable Service Tin Select This When Requesting (Min) Change to Documentation Time or Travel Time (for services on or CORRECT Episode Number of Client's In Group after 7/1/2023) Select ~ NEW Location Code Select For Progress Notes created on or after 7/1/2023, be sure to include NEW Service Time Client Present in Person details in the comments about the change you need to ensure that (Min) the changes that are made are accurate! For services that need an add-on code added/removed/modified, OR ~ if you need to change the primary service code but don't need to CORRECT Client change the add-on code -- specify what the primary service code should be including the time for that service, and specify what the add-on code should be, including the time. Change Comments/Reason For services that need adjustments made to the documentation time or travel time -- include what each time should actually reflect, even if you're only editing one or the other.

It seems that the location code is **defaulting back to OFFICE** if the location code is filled out **before** other fields in the progress note are filled out.

We understand how this negatively impacts staff workload and the accuracy of the client's progress note information, so we continue to work with IT to see if we can find a solution for this issue.

Discard

Submit

Add to Favorite

Staff do not need to comb through ALL of their previous notes to check the location code. However, if staff notice that a finalized note has the incorrect location code, please go ahead and submit **a Progress Note Error Correction Request** form in Avatar to correct the location code. Or if you receive a message from the Billing Department (a.k.a. MIS) because they caught an error in the location code, please review the note and make the correction if upon your review you determine that the wrong location code was saved.

Progress Note For	*	Select Draft Note To Edit
	Note O New Service	Select
		Service Program Q
Type of Progress I	Fill the "Location Code"	Select
Standard Pro	AFTER you have	Location
O Treatment Pla	completed all other	Select ~
Treatment Pla	items in this section of	Service Time *
_ Did client particip	the progress note.	
⊖ Yes	<u>○</u> No	Documentation Time 😵
Did caregiver parti	icipate in appointment? * 😵	
		Travel Time 🖓
Client is not d	ependent adult or minor	Other Billable Time \heartsuit
Practitioner V		Service Duration
ID4,TRAIN (00006	6)	
Date Of Service		Other Non-Billable Time 🖓
Service Charge Code	• 🗘	

While we continue to work on a fix to this issue, we recommend that you fill out the "Location Code" **after** you have filled out all of the other parts of the top section of the progress note.

In our testing, it seems this workaround works, but if you are still experiencing issues even after this workaround, please let us know by emailing <u>HS_BHRS_ASK_QM@smcgov.org</u>.

Progress Notes for Co-Practitioners

53. Co-Practitioner Section in Progress Note

Due to technical issues with being able to add add-on codes to co-practitioners using the co-practitioner fields, we discontinued the use of the copractitioner section of progress notes with the introduction of Payment Reform on 7/1/2023. For service on or after July 1, 2023, in order to successfully bill services staff need to complete separate progress notes when more than one provider will be billing for the same appointment for any service type (including group). This Co-Signature section of progress notes will disappear as of October 13, 2023.

ntal Health Progress e	~					
unch OrderConnect IULT Reassessment v2 UTH Reassessment v2 neduling Calendar	Co-Pract	itioner 🕅	٩	Co-Practitioner Service Time	٦	
(from Assess. ADULT (from Assess. YOUTH				Co-Practitioner Documentation Time		
		This section should <u>not</u> be used for any services		Co-Practitioner Travel Time		
	L	2023.		Co-Practitioner Other Billable Time		
		This section will be removed from the Progress Notes as of 10/13/2023		Co-Practitioner Duration		
				Co-Practitioner Non-Billable Time		

Entering Add-On Codes

54. Add-On Codes Trouble Shooting

Because the Add-On field in Avatar does not show the minutes saved for each add-on, the next few pages describe how to check your Add-On code information and how to correct an error to add-on codes.

v	▼
Add-On Service S SIGN LANG OR ORAL INTERPRE ✓ Add-On Duration * 25	Add-On Service Select × ✓ Add-On Duration
Selected Add-On Services	Selected Add-On Services SIGN LANG OR ORAL INTERPRETIVE ADD ON (T1013)
Select Add-On Service Entry to Edit/Remove SIGN LANG OR ORAL INTERPRE ✓ Remove Add-On Service	Select Add-On Service Entry to Edit/Remove Select × ✓ Remove Add-On Service

Checking Add-On Codes

You can see add-on codes and add-on minutes you added via your "Progress Notes" widget under the "Clinical/Medical" view tab or the Console Widget in your "Documentation" view tab.

						PROGRESS NOTES	៤១
						Previous days: Selection: All Notes	
NICIAN						Console widget viewer	- •
Forms Scanned Docume	nts					Mental Health Progress Note × Note Type: (1) BHRS Standard N	ote
Form Description \$	Episode ≎	Date ≑	Time 💠	Data Entry By 🖨	Workflow Status 💠	Mental Health Progress Note Was this contact in English?: Yes Progress Note For: New Service	
ALL ~	ALL ~	ALL ~	ALL ~	ALL ~	ALL 🗸	Draft/Final: Final	
Mental Health Progress Note	84 (921400 DALY CITY YOUTH HEALTH CTR)	07/19/2023		TRAIN ID3	Final	Date Of Service: 07/14/2023 Selected Add-On Services:	RVICE (G2212G)
Mental Health Progress	22 (416800 EAST BAYSHORE	07/14/2023	-	ERI TSUJII	Draft	Service Charge Code: INDIVIDUAL THERAPY 53-6 Duration: 80	
	ADULT)					Service Program: 416800 EAST BAYSHORE ADULT	
Mental Health Progress Note	CITY YOUTH HEALTH CTR)	07/14/2023	-	PAUL JOHNSON	Draft	Location: OFFICE (A) Type of Progress Note: Standard	Progress Note
Mental Health Progress Note	22 (416800 EAST BAYSHORE ADULT)	07/13/2023		PETER ANTONY DELL	Final	Service Time : 21 Did client participate in this apportion: 21	intment?: Yes
Mental Health Progress Note	22 (416800 EAST BAYSHORE	07/12/2023	-	PETER ANTONY DELL	Final	Notes Field: ZXOZCXZ	please mark what type of appt
Mental Health Progress Note	85 (Z41DT00 AUTISM CENTER OF NC 03-2017)	07/10/2023	-	JOSEPH DELAGUILA	Draft	Note Type: (2) BHRS Standard Note(Co-sign Required)	
Mental Health Progress Note	22 (416800 EAST BAYSHORE ADULT)	07/10/2023	-	TRAIN ID15	Final	Was this contact in English?: Yes	
Mental Health Progress Note	81 (410399 CENTRAL CO. BRIEF TREATMENT)	07/06/2023		TRAIN ID15	Final	Draft/Final: Draft Selected Add-On Services: THERAPY PROLONGED SERVICE (G2212)	
Mental Health Progress Note	22 (416800 EAST BAYSHORE ADULT)	07/06/2023		PETER ANTONY DELL	Final	Duration: 25 Notes:	
Mental Health Progress	57 (410101 NORTH COUNTY	N7/N3/2023	- 1 2 •	ΤΡΔΙΝ ΙΟ9	Draft 50 of 474 row	Did dient participate in this appointment?: Yes	
						Documentation Time: 10	•
	Open	New Record +	Clear	Filters		Open Record Close All Print -	•

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Correcting Errors to Add-On Codes

QM, IT, and MIS are still working on updating this form to be more in-line with the CalAIM changes. In the meantime, please follow the instructions below when making corrections for notes with Add-On codes.



Viewing Old Progress Notes

55. How do I view old Progress Notes?

There are several different ways to view old progress notes. The table below shows 3 main ways to view progress notes easily through various widgets. Alternatively, you also always have the ability to view progress notes in a clean, formatted, and PDF-able way by running the "**Progress Notes Report**."

	Console Widget Viewer	Progress Notes Widget	Last 100 Progress Notes Widget
View Tab	Documentation Tab	Clinical/Medical/SUD Tabs	Clinical/Medical Tabs
System	SUD and MH	SUD and MH	MH only (coming soon for SUD)
Description	Viewing individual progress notes. Filterable using the Forms Widget.	Less-filterable but easy way to view previous notes is through the original Progress Notes widget. You can see a larger number of notes, but you won't be able to filter it like you can with the Last 200 Progress Notes widget.	Allows you to preview and filter the last 100 notes for a client. This widget allows you to filter/search by date of service, practitioner, service code, and notes field (you can even search for a specific word via the notes filter!). (Not currently available for SUD staff).

The next 2 pages show what each widget looks like.

Z

Step 1) Select a client.

Step 2) Under the "Documentation" Tab on the very top left, you'll see a list of documents you can view. Click on it.

Step 3) You'll see it pop on the widget screen with a list of the following:

- Form Description
- Episode
- Date
- Time
- Data Entry By
- Workflow Status

Step 4) You can click on the Progress Note or Form you'd like to look at. It'll pop up in the widget next to it called "Console Widget Viewer".

Plan	TEST, JOLLY	T (0009	3876	0)						
Day Treatment Daily Note Day Treatment	Age: 12, I Gender: N	DOB: 1 M	0/27/:	2010	, BM 200	l l : 87.9,) lbs	Ht: 3' 4.0	", Wt: Ep: Location: 	(2) 🔺 Allergies	<u>(17)</u> &
Weekly Summary Diagnosis	ADMIN MENT	AL HEA	ALTH		_		ď 2	CONSOLE WIDGET VIEWER		ß
Discharge (Outpatient) Initial Contact Screening (ICI) Medication Administration	Forms Wid Form Descriptio \$	Scanne get Episor	ed Doc to∖ Date ≑	umer ∕İe∖ Tiπ ≑	nts N Do Data Entry By ≑	CS Wor Stat		Client Treatment and Recovery P Update Client Data *	lan ×	
Record Mental Health Progress Note	M V	<i>I</i> ∨81(4103)	~	~	A ~	~		<u>Update Client Data</u> Client Name: TEST,JOLLY T		
Data URGENT CARE PLAN	Health Progress Note	CENTI CO. BRIEF	07/06	-	TRAIN ID15	Fina		Client Last Name: TEST		

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MH Last 100 Progress Notes

AST 100 PROC	GRESS NOTES				C 2
Search:				Use these search bars to search	Î.
Date of Service ↑↓	Practitioner 1	Service Code	Note	specific terms/dates/etc.	. Ep. ↑↓
Date of	Practitioner	Service (Note		Ep.
08/01/2023	ID4,TRAIN	51CA	This note was finalized on 8/1/23 at 8:32 a.m.		22
07/31/2023	ID4,TRAIN	7CA	I am submitting this note on 7/31/2023 at 4:50	0 PM	22
07/31/2023	ID4,TRAIN	51CA	this note was submitted at 5:10 pm on 7/31.		22
07/27/2023	TSUJII,ERI	7CA	dsadsadsadsa		22
07/26/2023	DELAGUILA, JOSEPH	55	test		85
07/19/2023	ID3,TRAIN	55	TEST		84

C

Printing Progress Notes

56. How do I print Progress Notes in bulk?

Search "notes report" in Avatar and select the type of progress notes report you want to print.

Progress Notes Reports include only the Progress Notes that were marked as "New Service." Use the "Progress Notes by Client" Report when printing reports for record release. For records releases, only print Final versions of the progress notes (see next page for more information on how to select only Final notes for printing).

Independent Notes Reports include only the Progress Notes that were marked as an "Independent Service." Independent Reports are <u>not</u> for chart/records release.

For SUD Progress Reports and Independent Notes Reports, use the Reports with "SUD" in the report name. MH providers cannot view SUD Reports.

Q R	hotes repo	ent Search Here is what	at I found:	×
M	All 7 C	lients Staff Forms Fo	rms	
	Undock	Name	Menu Option	
R	Ľ	Progress Notes Report by Client	/ Avatar CWS / Reports / Progress Note Reports	
Co	Ľ	Progress Notes Report by Clinician	/ Avatar CWS / Reports / Progress Note Reports	
Ċ	Ľ	Day Treatment Progress Notes Report	/ Avatar CWS / Reports / Progress Note Reports	
	Ľ	SUD Progress Notes Report by Clinician	/ Avatar CWS / Reports / Progress Note Reports	
	Ľ	Independent Notes Report by Client	/ Avatar CWS / Reports / Progress Note Reports	
	Ľ	Independent Notes Report by Clinician	/ Avatar CWS / Reports / Progress Note Reports	
T I	Ľ	SUD Progress Notes Report by Client	/ Avatar CWS / Reports	

A new feature of the progress notes reports is that you can now select the status type.

Progress Notes that are included in the "**Drafts**" version of the reports include notes that are in draft or are pending approval. Notes that are Pending Approval have "**Pending Approval**" in the top right corner of the PDF. Notes that were sent back for revision by the approver will be marked as "**Rejected**" in the top right corner of the PDF and will need to be corrected and re-sent to the approver for co-signature.

Progress Notes that are included in the "**Final**" version of the reports include notes that have been finalized or, in the case of those that require cosignature, notes that have been approved by the co-signer. Final versions will have "**Final**" in the top right corner of the PDF.

PROGRESS NOTES RE	PORT BY CLIENT		Process	Discard Add to Favorites
Progress Notes Report by Client	Client ID *		Status Parameter *	
	TEST,JOLLY T (938760)		Q Select	× v
	Start Date *		End Date *	
Status Parameter *		× ~ Q	SAN MATEO COUNTY HEALTH BEHAVIORAL HE & RECOVERY SE	EALTH RVICES gress Notes Report
Draft			TEST,JOLLY T (938760) D.O.B. 12/20/1960	Votes from 1/1/2024 10 2/2//2025
Final			Prog. Note For: New Service Note Type: (2) BHRS Standard Note(Co-sign R Date of Service: 2/20/2025 Service Program: 410199 NORTH CO.E Location: OFFICE Service Charge Code: (51CA) CASE MANAG	equired) / Standard Progress Note BRIEF TREATMENT (101) GEMENT
			Service Time Client Present in Person (Min): Other Billable Service Time (Min): N/A Service Duration (Min): 10 Other Non-Billable Service Time (Min): N/A Did Client Participate in This Appointment?N Did Caregiver Participate in This Appointment Yes Documentation Time: N/A Travel Time: N/A Number of Clients in Group: N/A Add-on Service: No Add-On Service Add-on Duration: N/A	10 o tt?

Deleting Draft Progress Notes

57. Where is the button to delete Draft Progress Notes???

This feature (which was previously named "Delete Draft / Group Default Note") has been added back to the Avatar NX Progress Note (both Mental Health and SUD). Additionally, to reduce confusion, it has been renamed to "**Delete Draft Progress Note**."

To delete a draft progress note, scroll to the bottom of the Progress Note Form and click on the "Delete Draft Progress Note" button. Remember, only drafts are able to be deleted from Avatar so check the entirety of your note before finalizing!



Section 8 Additional Features in NX

- Appointment Calendars
- Signature Pads
- Notes Features in NX

Updated: 4/3/2025

Appointments / Calendars

58. How do I link Outlook to my Avatar Calendar? I thought this was possible.

The Outlook Calendar cannot be linked to the Avatar Scheduling Calendar. This is something outside of QM and IT's hands as the vendor reported to us that this is not a feature that is available for use in NX.

59. I can't get my calendar widget to work! It won't let me enter any appointments!

The "My Calendar" widget on your myDay view tab only pulls information from the Scheduling Calendar so that you can view it. The actual Scheduling Calendar that you use to add/edit/delete appointments can be accessed 2 ways (see green boxes in screen shot below).

- 1) By searching for "Scheduling Calendar" in your search bar.
- 2) Clicking on the calendar icon on the left bar of your NX screen.



Signature Pads

60. Using the Signature Pad with Avatar NX

There are two steps to getting a signature pad to work with AVATAR NX.

Step 1) Open a Service Now ticket in OKTA. Go to "Request Services" and then "Applications & Software" and then "Application Access."

Enter the requested information. The Application Name is "**other application**" and the description is something such as "*Please install the new file (.exe) for the Topaz signature pad driver*."

IT will contact you in the next day or so and set up a time to install. It is estimated to take about 15 minutes and they will need the signature pad model number.

You may need to reboot your computer after the installation.

Step 2) Set your AVATAR NX preferences. Go to the User Menu, select preferences. Under general preferences there is signature preferences. Select what works best for you signature pad; mouse/touch; or ask me each time. Images below.



Once you have completed these two steps – the signature pad should work once again!





Updated: 4/3/2025
Notes Features in NX

61. MyDay "Note to Self" versus embedded "Notes" in forms.

There are two types of "Notes" available in Avatar NX.

	<u>"Note to Self"</u>	<u>"Notes" in Forms</u>
Location	MyDay Tab	Available on some forms but not all
Description	Functions like a "post it note" in Avatar that only you can see.	Can be seen by all staff who have access to the form. Does not print out as part of the formal reports, but can be seen by anyone who has direct access to the form in Avatar (which in some cases can include auditors, etc.) These types of notes CANNOT be deleted.



Note to Self

The "Note to Self" widget in the MyDay tab is available for you to write a note to yourself. Only you are able to see this note and you can add, edit, or remove the item yourself.

NOTE TO SELF		C.
Create a new reminder		
Save Cancel	Type your note in this text box then click "Save"	
	NOTE TO SELF	 2*
	Search	
	1) Print JD's Treatment	Plan on Thursday!

<u>"Notes" in Forms</u>

"Notes" feature is available in some forms, but it is different from the "Note to Self." While the "Note to Self" can only be viewed by you, the "Notes" feature in forms can be seen by anyone who has access to form.

▲ TEST,JOLLY T (000938760)				
2	TEST,JOLLY T (000938760) M, 12, 10/27/2010 Ht: 3' 4.0", Wt: 200 lbs, BMI: 87.9	Ep: - Problem P: - DX P: -	Location: - Attn. Pract.: - Adm. Pract.: -	 1. Alert QM of billable diagnosis. Allergies (17) STOP - THIS IS A STAND ALON 1) TYLENOL - Active 2) PENICILLINS (CLASS) - Active 3) ATORVASTATIN - Active 4) CODEINE - Active 5) AMOXICILLIN - Active
CLINICAL	L CONSENT FORMS		Submit	Backup Notes Discard Add to Favorites
Concente		Notos		
> NE	W: Written by TRAIN04, TRAIN 08/22/2023 08:57 AM itten by TRAIN04, TRAIN 08/16/2023 09:06 AM ting Where this Consent Form Note goes.			Clinical Consent Forms Guide Clinical Consent Form Script Language for Printed Version (If Ianguage is not available for selected consent type, select English) English This provider reviewed this consent form with the Client or
				Important: While the "Note to Self" in MyDay can be deleted, these "Notes" in forms CANNOT be deleted!
File N	Note Cancel			

Section 9 Avatar NX Resources

- Avatar NX Videos
- Need More Help with Avatar NX?
- BHRS Resources (Avatar NX and CalAIM)

Avatar NX Videos

62. Re-watching the Avatar NX Videos I already completed

We realize we are throwing A LOT of information at you at once! The benefit of having the trainings on LMS is that you are able to re-watch them after you've completed in case you need to review the information. The following steps can be done with any LMS training you've completed, not just the Avatar NX videos.



For some trainings, you can launch directly from the register screen because it is not part of a larger series of trainings (a.k.a. "curriculum").



Updated: 4/3/2025

63. I can't recall. Did the Avatar NX Training cover [X] topic?

See below for the list of all of the Avatar NX video topics that were included in the mandatory Avatar NX training curriculum in the LMS.



Need More Help with Avatar NX?

BHRS IT	Okta: Submit a Service Now ticket.		
	Email the IT Support mailbox: <u>bhrs-it-support@smcgov.org</u>		
	Call the ISD Help Desk: (650) 573-3400		
BHRS QM	For General Questions, Email BHRS Ask QM: <u>HS_BHRS_ASK_QM@smcgov.org</u>		
	For Troubleshooting LMS Access, Email BHRS QM: <u>HS_BHRS_QM@smcgov.org</u>		

How do I know whether it's BHRS IT or BHRS QM to contact for my issue? I've contacted in the past only to be told I should contact the other unit.

With the exception of password resets and other items specifically noted in this Avatar NX Updates document, all questions regarding Avatar NX should be sent to <u>BHRS ASK QM</u> (or <u>BHRS QM</u> if the issue is regarding your LMS account) QM will look into the issue and will let you know whether or not this issue requires a service request to BHRS IT.

Please note that there may be some cases where the initial step is to contact one unit, and then there may be an additional step that must be completed by the other unit to resolve the issue completely.

BHRS Resources (Avatar NX and CalAIM)

The following are available on the <u>BHRS QM Website</u> under the "CalAIM" tab.

- 1. BHRS Documentation Manual for SMHS
- 2. BHRS Service Codes Cheat Sheet for SMHS
- 3. LMS Links to BHRS CalAIM and Avatar NX Webinars
 - a. **BHRS Staff:** Access LMS through your Okta account, or click <u>here</u>.
 - b. **Contract Agencies:** Click <u>here</u>. (Don't have an LMS account set up? Create an account by clicking <u>here</u>.)

The following is available on the <u>BHRS QM Website</u> in the "Avatar" section under the "Documentation Resources" tab.

<u>Avatar NX Updates and Tip Sheet</u> (Created 8/1/2023; Updated periodically)

