## Avatar NX Updates and Tips

### Contents

<table>
<thead>
<tr>
<th>Section</th>
<th>Pages</th>
</tr>
</thead>
<tbody>
<tr>
<td><strong>Important Information!</strong></td>
<td>2</td>
</tr>
<tr>
<td><strong>Section 1 Avatar NX: The Basics</strong></td>
<td>3</td>
</tr>
<tr>
<td>Accessing Avatar NX</td>
<td>4</td>
</tr>
<tr>
<td>Menus and Task Bars</td>
<td>5</td>
</tr>
<tr>
<td>Customizing Your Views (including Widgets!)</td>
<td>8</td>
</tr>
<tr>
<td>Appointments / Calendars</td>
<td>11</td>
</tr>
<tr>
<td><strong>Section 2 Client’s Charts</strong></td>
<td>12</td>
</tr>
<tr>
<td>Finding Clients in NX</td>
<td>13</td>
</tr>
<tr>
<td>Opening New Forms for Clients in Avatar NX</td>
<td>14</td>
</tr>
<tr>
<td>Navigating Multiple Open Charts / Forms in NX</td>
<td>15</td>
</tr>
<tr>
<td>Signature Pads</td>
<td>17</td>
</tr>
<tr>
<td>PSC-35</td>
<td>18</td>
</tr>
<tr>
<td>Progress Notes</td>
<td>19</td>
</tr>
<tr>
<td><strong>Section 3 Supervisor - Supervisee Communication</strong></td>
<td>26</td>
</tr>
<tr>
<td>Co-Signatures</td>
<td>27</td>
</tr>
<tr>
<td>Sending To Dos and Notifications</td>
<td>30</td>
</tr>
<tr>
<td><strong>Section 5 Printing and Scanning</strong></td>
<td>33</td>
</tr>
<tr>
<td>Printing Reports / Formatted Versions of Forms</td>
<td>34</td>
</tr>
<tr>
<td>Scanning in NX</td>
<td>38</td>
</tr>
<tr>
<td><strong>Section 6 Avatar NX Resources</strong></td>
<td>39</td>
</tr>
<tr>
<td>Avatar NX Videos</td>
<td>40</td>
</tr>
<tr>
<td>Need More Help with Avatar NX?</td>
<td>42</td>
</tr>
<tr>
<td>BHRS Resources (Avatar NX and CalAIM)</td>
<td>42</td>
</tr>
</tbody>
</table>

Items marked as **NEW** are new as of the publication of this “Avatar NX Updates and Tips.”

Items marked as **Old** are still valid, but were already included in previous versions of “Avatar NX Updates and Tips”

Clicking on this button (located at the bottom of each page) will return you to the Table of Contents (page 1).

Updated: 8/1/2023
Staff MUST complete **BOTH** the “CalAIM Progress Notes” and “Avatar NX” trainings to migrate to Avatar NX.

*NEW* 1. **Update: Access to the old Avatar will shut off in September.**

Originally, IT and QM informed staff that access to old Avatar will shut down at the beginning of August. However, to better support staff transition to Avatar NX, staff access to the old Avatar will continue until September.

**Staff who have not attempted to migrate via LMS trainings** (BOTH the Avatar NX training curriculum and the CalAIM Progress Notes training) **before 8/18/2023** will have their access to the old Avatar **removed** until they successfully complete both trainings.

*NEW* 2. **PRE-CalAIM Progress Notes**

The HARD deadline for getting ALL your pre-7/1/2023 notes was 7/19/2023. If you still have some old notes to input, please contact **both** the BHRS QM Manager (Betty Ortiz-Gallardo, bortiz-gallardo@smcgov.org) AND the BHRS Financial Services Manager, Marie Fontana (mfontana@smcgov.org), to coordinate how to input your pre-7/1/2023 notes into Avatar.
Section 1

Avatar NX: The Basics

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

OLD  3.  Accessing Avatar NX (using website link)

As a reminder, **please DO NOT share your Avatar NX link with other users.** The link that is sent to you by BHRS IT is unique to you.

We understand that people are eager to start using Avatar NX after completing the trainings (we are excited for you to use it, too!), but please be patient to receive your individual link from IT – we are working as quickly as possible to send everyone their individual links upon completing the trainings. Please continue to use the old Avatar until you receive your unique Avatar NX link. The new CalAIM service codes are also available in the old Avatar!

- If the link you received directly from BHRS IT is not working, please contact BHRS IT to request support.
- If the link you received from a colleague is not working, that is expected as you need to wait to receive your unique link from BHRS IT.

OLD  4.  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.
**NEW**  5. What is an easy way to view my appointments for today, To Dos, and Open Forms?

The Activity Pane is going to quickly become your best friend in Avatar NX!

- 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.
OLD  6.  Where is the MENU BAR???

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 after 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).

*NEW*  7. Adding to My Favorites

If you would like to save your frequently used forms in one easy place, we recommend using the “My Favorites” feature in your 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 created folders using the “Add Folder” feature on the top right of the pop up window. Use the “Edit” 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.
Customizing Your Views (including Widgets!)

*NEW* 8. The form is unreadable in NX! Zooming In/Out – The solution to some NX viewing issues.

Can’t input date or time into date/time fields? Text overlapping in the window? Before submitting a support request to IT/QM (which, due to the volume of questions we are receiving can cause delays in response), see if magnifying or reducing the size of the window/text solves the issue. For example:

Click this square to make window bigger

Hold down Ctrl on your keyboard while rolling your scroll button on your mouse (see where arrow is pointing on image below). Scroll forward to make bigger and scroll back to make smaller.

Ah! “Time” is not showing up and all the text is overlapping! It’s hard to read! WHAT DO I DO?

OR... Hold down Ctrl while clicking the + or - keys on your keyboard.

After Re-Sizing!
*NEW* 9. There are too many widgets! There’s too much scrolling needed to find information!

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 below: 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.**
For a video demo of how to customize widgets, view the “Customizing Widgets” module in the Avatar NX training curriculum in Avatar NX. (See “Avatar NX Updates” Issue 1 for instruction on how to re-watch completed trainings in the LMS).

*NEW* 10. How do make the document preview from the Console Widget bigger!

If you want to view a form in the undocked / expanded Console Widget Viewer, undock it first, THEN select the form. See screenshot below.
*NEW* 11. 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.

*NEW* 12. I can’t schedule an appointment in my calendar for longer than 15 minutes!

QM, IT, and MIS are aware of this issue and are working to address this issue as quickly as possible. Thank you to staff for alerting us of this! We will update staff as soon as a “fix” is available.
Section 2

Client’s Charts

- Finding Clients in NX
- Navigating Multiple Open Charts / Forms
- Signature Pads
- PSC-35
- Progress Notes
Finding Clients in NX

*NEW* 13. ISSUE RESOLVED: Advanced Client Search – Do I use the Assigned ID or Claim Number?

Issue Reported: Staff were confused about whether to put the client’s number into the Assigned ID or Claim Number field when using the Advanced Search function in Avatar NX.

Solution: The form has been modified so that there is now only one field that requests a client number.

This is the usual Client ID number that most staff associate with a client.

Also known as "Medical Record Number (MR#)" "Patient ID (PATID)" or "Client Number"
How do I open 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 see the Customizing Your Views section of this document.
Navigating Multiple Open Charts / Forms in NX

*NEW*  15. How to Open Multiple Client 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. See Console Widget section for information on how to undock the 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.

OLD  16. 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).

Note: Some forms, such as the Progress Notes and Medication Administration Record, will not be listed under the client name. To find out which client the form is associated with, click on the link to the form to open the form.
*NEW*  17. ISSUE RESOLVED: Signature Pad was not working in Avatar NX

**Issue Reported:** Staff were not able to use the Signature Pad when using Avatar NX.

**Solution:** A software update was needed to resolve this issue. The Signature Pad should now work in Avatar NX. *If you are still experiencing issues, please submit a ticket through Service Now by following the instructions below:*

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!
*NEW* 18. How do I find the PSC-35?

For both the old Avatar and Avatar NX, you would use the Generic Access feature to locate the PSC-35. The difference is that in NX you would find the Generic Access function through your Widgets in your Activity Panel (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.
Progress Notes

*NEW*  19.  ISSUE RESOLVED: Time Fields Greyed Out When Re-Opening Draft Progress Note

Issue Reported: When staff re-opened a draft note, they were unable to edit the Documentation Time and Travel Time.

Solution: The Documentation Time and Travel Time can now be edited after re-opening a draft. HOWEVER, this fix results in all of the time fields opening up for editing (Documentation, Travel, and Other Billable). Please ensure that you are filling out ONLY the Time fields that are appropriate based on your date of service.

- **Services on or before 6/30/2023:** Use “Other Billable Time” only
- **Services on or after 7/1/2023:** Use “Documentation Time” and “Travel Time” NOT “Other Billable Time”

If you are not sure which time fields to fill out, simply re-enter the service date and it will trigger the fields to close the time fields that are not applicable based on service date.

*NEW*  20. ISSUE PENDING: Location Code Reverting to OFFICE in Progress Notes

Staff have reported that the Location Code in their progress notes are reverting to OFFICE despite selecting another Location Code.

It seems that the location code is defaulting back to OFFICE when 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 are currently working with IT to see if we can find a solution for this issue.
For now, 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 email HS_BHRS_ASK_QM@smcgov.org to let us know.

*NEW*  21.  Selecting the episode for a progress note without scrolling

Staff are reporting that they are struggling to find the correct episode to document a progress note for a client especially when the client has many open and closed episodes.
You can reduce the number of items that show in your drop down by typing in a search term in the episode field. Simply click on the down arrow of the “Select Episode” drop down arrow and a text 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.

*NEW* 22. **Progress Note Error Correction for 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.

---

**For Progress Notes created on or after 7/1/2023, be sure to include details in the comments about the change you need to ensure that 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 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.**

**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.**
23. How do I see if the Progress Note Add-On Codes I added successfully?

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.

24. How do I view old Progress Notes??? **NEW WIDGET for MH Staff**

There is a new widget for MH Staff that allows you to preview and filter that 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 “Last 100 Progress Notes” widget is available for those MH staff who have the Clinical or Medical view tab. If you don’t see the “Last 100 Progress Notes” on your main widget window, this just means you need to add it by using the “Customize” function in your Activity Panel.

### OLD 25. How do I view old Progress Notes? (Option 2 – scrolling multiple notes)

Another 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.
How do I view old Progress Notes? (Option 3 – individual notes)

You do still have the ability to look at old progress notes like you did in the old Avatar, but the process does look slightly different, and the viewing options are a bit limited compared to before.

Follow the steps on the next page to learn how to view old progress notes in Avatar NX.

**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”.

*Unfortunately, this widget cannot be maximized. You can move different dashboard views to try to maximize the space to look at the Progress Notes.*
OLD 27. 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.”

OLD 28. Where are the text templates for Progress Notes??

The text templates for progress notes are still there! However, the way to get to them has changed. You can no longer access them by right clicking in the progress notes box. Instead, you should click on this icon to get to the menu of available templates.

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.

OLD 29. The “Number of Clients in Group” field in Avatar NX Progress Note is not working!!

This will disappear after 7/31/2023 because it will no longer be used as part of the billing process under CalAIM.

Use the “Number of Clients in Group” field ONLY if a group service was provided on or prior to 6/30/2023. If you enter a group service that occurred on or after 7/1/2023, or you select a code that is NOT a group, this will be grayed out.

Number of Clients in Group is no longer required information for group services on or after 7/1/2023. The new billing rates established by DHCS have been adjusted to account for group services without calculating the number of clients in the group.
Section 3
Supervisor - Supervisee Communication

- Co-Signatures
- Sending To Dos and Notifications
Co-Signatures

*NEW* 30. Supervisor Co-Signature Issues

Where do forms that get kicked back to me by my supervisor for edits go? 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 "Menus and Task Bar" 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.

My supervisor is not receiving my forms that I’ve sent to them for co-signature

First, check that both your account and your supervisor’s accounts have not 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.

Avatar says a Co-Signature is Required, but I don’t actually need a Co-Signer (I am licensed)

Contact BHRS IT directly to resolve the issue.

*NEW* 31. Supervisor Co-Signature Instructions (Progress Notes)

The old Avatar way of sending progress notes for co-signature to your supervisor no longer works in NX.

How do I send my progress notes for co-signature in NX?

“Document Routing”: This is a feature in NX that staff can use to route documents to their supervisor. The window will pop up for all notes that get finalized, regardless of if the note requires a co-signature. IT is unable to limit this pop up to show only for notes that require co-signature.
For notes that do NOT require co-signature:

For staff that selected one of the note types that do not need a co-signature, the Routing pop up box will show up but the “approver” fields are not required for these notes. Staff will just need to hit submit without filling anything out.

For notes that DO require co-signature:

When a note type that does require co-signer is selected then the approver field will show as required.

*NEW* 32. Supervisor Co-Signature Instructions (Treatment Plans)

How do I send my Treatment Plan for co-signature?

Use the “Sent To for Co-Signature” feature embedded in the Client Treatment and Recovery Plan form in Avatar to send the Treatment Plan to your supervisor.
*NEW* 33. Supervisor Co-Signature Instructions (Assessments)

If your account is set up to require co-signature, then you will be prompted to send to a supervisor when you submit a final version of an assessment. This is the pop up that shows up:

![Supervisor Co-Signature Instructions](image)

Search by Last Name.

Click the "Add" button and Approver will show in the table at the bottom.
Sending To Dos and Notifications

OLD 34. Sending To Do’s (Option 1)

The “Send Notification Form” that was available in the old Avatar has been replaced with the “Send To Do” feature in Avatar NX. You can access the “Send To Do” feature through “Quick Actions” in Avatar NX. See the “Quick Actions” instructions on the next page.

Reminder: If you try to use this “Send Notifications” form in Avatar NX, nothing will happen – it does not work.

Quick Actions

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 supervisor should be able to view the To Do item in their To Do list.

When they click on the To Do item, a screen will pop up with the content of the note you sent, and the client will also pop up on the left hand side of their screen.
OLD  35. Sending To Do’s (Option 2 – available only on some 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.

![Send To Do button screenshot](image-url)
Section 5

Printing and Scanning

- Printing Reports / Formal Versions of Forms
- Scanning in NX
Printing Reports / Formatted Versions of Forms

*NEW* 36. Printing Reports of Single Assessments and Treatment Plans

Here is the easiest way that we’ve found to select and print reports*. The screen shot below shows “Admin” but it works with other users, too.

*To print formatted versions of a 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.

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 forms you’re looking for.

Step 3) Double click on the form you would like to print. Then click on “Launch Report”
Step 4) Click on “Print Report” located on the top left corner of the window to print a copy for your client!

*NEW* 37. Printing Reports of ALL of a Client’s Assessments/Treatment Plans/Progress Notes, etc.

The following are the most commonly used reports for Client forms. You can add these forms to your “Favorites” to easily access them in the future.

- All Adult Assessments V2
- All Youth Assessments V2
- Client Treatment Plan V2
- Progress Notes Report
- DX from Assess. ADULT
- DX from Assess. YOUTH

When searching for a report, make sure that the item you select notes that it is a “Report’ (see screenshot below)
Once you open the report, 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*  38. How do I save a PDF version of a report in Avatar NX?

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.
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.
*NEW* 39. ISSUE RESOLVED: Problems Viewing Scanned Documents in Avatar NX

Issue Reported: Users reports that they were unable to use the scan feature and unable to view scanned documents.

Solution: This has been fixed by the vendor Netsmart.
Section 6
Avatar NX Resources

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

In case you process information better via video demo, QM has produced a short video showing you how to re-watch LMS trainings.

This video was attached to the QM Lightbulb Email dated 8/1/2023, or you can contact BHRS As QM directly to request this video.
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?

<table>
<thead>
<tr>
<th>BHRS IT</th>
<th>Okta: Submit a Service Now ticket. Email the IT Support mailbox: <a href="mailto:bhrs-it-support@smcgov.org">bhrs-it-support@smcgov.org</a> Call the ISD Help Desk: (650) 573-3400</th>
</tr>
</thead>
<tbody>
<tr>
<td>BHRS QM</td>
<td>For General Questions, Email BHRS Ask QM: <a href="mailto:HS_BHRS_ASK_QM@smcgov.org">HS_BHRS_ASK_QM@smcgov.org</a> For Troubleshooting LMS Access, Email BHRS QM: <a href="mailto:HS_BHRS_QM@smcgov.org">HS_BHRS_QM@smcgov.org</a></td>
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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 BHRS ASK QM (or BHRS QM 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 also available via the CalAIM tab on the BHRS QM Website.

1. **BHRS CalAIM FAQ**
2. **BHRS Service Codes FAQ and Cheat Sheet** (Updated 8/1/2023)
3. **Avatar NX Updates and Tip Sheet** (Created 8/1/2023)
4. **LMS Links to BHRS CalAIM and Avatar NX Webinars**
   a. **BHRS Staff**: Access LMS through your Okta account, or click here.
   b. **Contract Agencies**: Click here. (Don’t have an LMS account set up? Create an account by clicking here.)