NEED TO KNOW FOR YOUTH ANNUAL/UPDATE ASSESSMENT:

The new Annual Assessment has 7 tabs a total of 10 pages. There is no bundle. The MSE, DX, & LOCUS are part of the main form. The current Annual that this new form is replacing has 10 pages (3 forms) + LOCUS -6 pages, DX- 7 pages = 23 pages. This is a reduction of 14 pages.

When you select Annual, required fields will become red on all pages and tabs.
When you select Update, you are able to complete only the fields that you are updating.

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

Tab 1 Assessment Information

ANNUAL:
• The Annual Assessment pulls forward information from the last assessment, regardless of which assessment form used (Old long or New V2). LOCUS, MSE and Clinical Formulation do not pull forward - you must complete them.
• The Diagnosis and Original Date/Time of Diagnosis is pulled forward. If you need to make changes to any diagnosis field, manually enter the date/time for the change.

UPDATE:
• Use Update to add additional information midyear, to change the diagnosis, to change the LOCUS and/or to update a specific field.
• MD can use Update to paste in adjunct PIN, but must fill in the date/type of assessment and source of information.
• If significant information needs to be added and/or corrected, it is best to complete an Annual or Initial Assessment.
Tab 2

Assessment Update

Complete any updates on this page

Right click to select staff identifier to insert your name if contributing/completing

Tab 3

CALOCUS

Right click to select staff identifier to insert your name if contributing/completing
Write any comments in the text box below the MSE category, if applicable
Enter other MSE info in the Other MSE Information text box, if applicable.
Enter any additional diagnoses in the Diagnosis Comments text box, if applicable.
The Primary Diagnosis automatically fills in; do not change unless the Primary Diagnosis is an Axis II Diagnosis.
Contributing Practitioner

There are now 2 boxes to enter the name of a contributing practitioner and area of their contribution, if applicable.

PENDING Approval now used only by a Trainee or first year resident requiring a Co-Signature. For Pending, select the name of the supervisor from the Send To drop down; then enter a message in the Send To Outgoing Comments box.

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

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

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

If you are a Community Worker/RN without a master’s degree in psych and assist with completing/conducting the assessment COMPLETE ONLY THE FIELDS WITHIN YOUR SCOPE! Then save the document as DRAFT.

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