



Protocol for Printing Client's Chart in Response to "Subpoena to Release Records" or "Client Request for Records"

Last Updated: 3/3/2025

Steps to Take:

- Step 1)** Review Request with clinical team, and for subpoena send the subpoena to the County Attorney's Office.
- Step 2)** In Avatar print the following documents listed below. **Only final versions of documents are included as part of the record release.**
- Step 3)** Review the episode display (**if the client was opened earlier than 2010 request the chart from storage and make a copy of the documents listed below).
- Step 4)** **BEFORE providing the documents ask the clinical staff to review the documents and WAIT for the clinical staff's approval to release records.**
- Step 5)** Any questions or other types of records release please contact QM.

QM Contact Information: HS_BHRS_QM@smcgov.org

In Avatar You Will Print Documents from the Following Sections:

Client Treatment Overview Documents	2
BHRS Episode Display	2
MH Client Dashboard	2
Urgent Care Plan	3
Medical Documents	3
Clinical Documentation (Previously Known as Client Views).....	4
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CLIENT TREATMENT OVERVIEW DOCUMENTS

BHRS Episode Display

1. (Search client > select client) Go to search forms “BHRS Episode Display” double click.

The screenshot shows the myAvatar NX interface. In the search bar, 'bhers episode' is entered. The search results show a table with columns: Undock, Name, and Menu Option. The first row is 'BHRS Episode Display' with a menu option of '/ Avatar PM / Reports'. A red box highlights the search bar and the search results table. A red arrow points from the search bar to the search results table.

2. Click “Process” and report will open, print report.

The screenshot shows the myAvatar NX interface. The 'BHRS Episode Display' form is open. A red box highlights the 'Process' button. A red arrow points from the 'Process' button to the 'BHRS Episode Display' form.

MH Client Dashboard

Print Client Dashboard. Search client > Select client. Search form “MH Client Dashboard”, select and process. Report will open and print report.

The screenshot shows the myAvatar NX interface. In the search bar, 'mh client' is entered. The search results show a table with columns: Undock, Name, and Menu Option. The first row is 'MH Client Dashboard' with a menu option of '/ Avatar CWS / Reports'. A red box highlights the search bar and the search results table. A red arrow points from the search bar to the search results table.



SAN MATEO COUNTY HEALTH BEHAVIORAL HEALTH & RECOVERY SERVICES

URGENT CARE PLAN

Print Urgent Care Plan. Search client>Select client>go to Documentation view Tab. Right column Forms - Select “Urgent Care Plan”, double click/open selected date of Urgent Care Plan. Right side column, click on print>print current. (“Print All” - **does not** print all reports just current selection.)

MEDICAL DOCUMENTS

Print Medical documents.
Search client>Select client>go to Documentation view Tab. Right column scroll down to Scanned Documents - Select “Discharge Summary” or “Medical Consultations-Hospitalizations”, double click>selected date of Discharge Summary or Medical Consultations-Hospitalization. Right side column click on print>print current. (“Print All” - **does not** print all reports just current selection.)

<https://www.smchealth.org/bhrs-doc/subpoenas-release-records-96-14>

Protocol for Printing Chart - Response to “Subpoena” or “Client Request”



CLINICAL DOCUMENTATION (PREVIOUSLY KNOWN AS CLIENT VIEWS)

Progress Notes

**** EXCEPTION – all Restricted labeled notes must be reviewed by a clinician. (If applicable for subpoenas, verify the time frame of the notes requested).**

1. Print Progress Notes. Search >Progress Note Report>go to Documentation view Tab. Search “Progress Notes Report By Client” or “SUD Progress Notes Report by Client” if an SUD program and select>Enter client name and select. Do not print Independent Notes.

Undock	Name	Menu Option
	Progress Notes Report by Client	/ Avatar CWS / Reports / Progress Note Reports
	Progress Notes Report by Clinician	/ Avatar CWS / Reports / Progress Note Reports
	Day Treatment Progress Notes Report	/ Avatar CWS / Reports / Progress Note Reports
	SUD Progress Notes Report by Clinician	/ Avatar CWS / Reports / Progress Note Reports
	SUD Progress Notes Report by Client	/ Avatar CWS / Reports

2. Enter Start Date and End Date. Make sure to select “**Final**” under the “Status Parameter.” This is because only final versions of progress notes should be included in records releases. Next, click on the “Process” button. The report will pop up and you can then print report.

Client ID

Status Parameter *

Select

Draft

Final

Start Date *

End Date *

Start Date

End Date

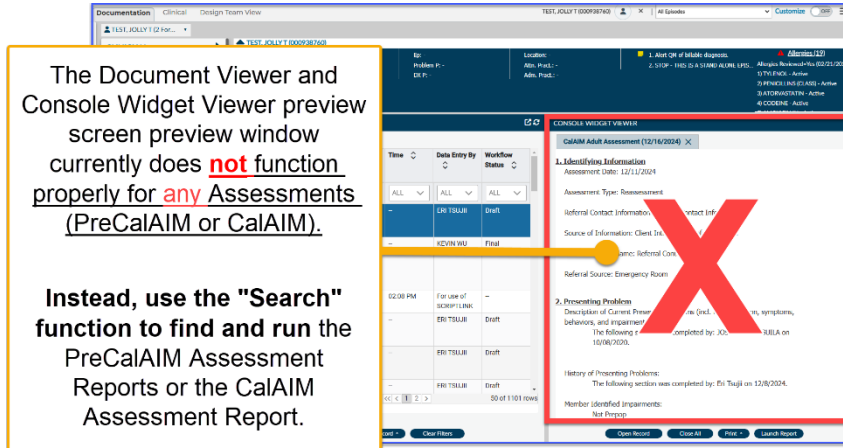


Assessments

DO NOT USE THE DOCUMENT VIEWER OR CONSOLE WIDGET VIEWER TO PRINT ASSESSMENTS.

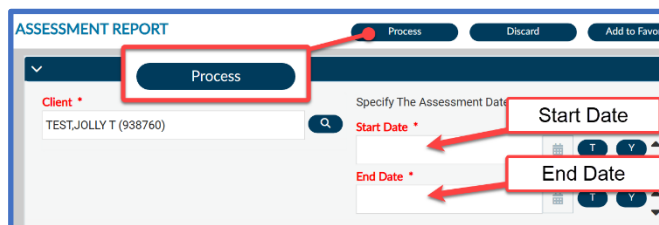
The Document Viewer and Console Widget Viewer preview screen preview window currently does not function properly for any Assessments (PreCalAIM or CalAIM).

Instead, use the "Search" function to find and run the PreCalAIM Assessment Reports or the CalAIM Assessment Report.



This is the proper way to print Assessments for record releases:

1. Search client > Select client > search for the name of the report. (See list of report names below). Print all of the following Reports:
 - ☐ **PreCalAIM Adult Assessment Report**
(for Assessments submitted in Avatar prior to 12/16/2024)
 - ☐ **PreCalAIM Youth Assessment Report**
(for Assessments submitted in Avatar prior to 12/16/2024)
 - ☐ **CalAIM Adult Assessment Report**
(for Assessments submitted in Avatar on or after 12/16/2024)
 - ☐ **CalAIM Youth Assessment Report**
(for Assessments submitted in Avatar on or after 12/16/2024)
 - ☐ **P.I.N. Assessments v1 (ALL)**
 - ☐ **PRE to 3 Assessments v1 (ALL)**
2. Enter Start Date and End Date. Select process. Report will pop up and print report.



ASSESSMENT REPORT

Process Discard Add to Favorites

Client *
TEST, JOLLY T (938760)

Specify The Assessment Date

Start Date *
End Date *

Start Date
End Date



Treatment Plans

Print Treatment Plan. Search client>Select client>go to Documentation view Tab. Right column Forms - Select “Client Treatment and Recovery Plan”, click on “Launch Report” on the bottom right of the Console Widget viewer. (“Print All” - **does not** print all reports just current selection.)

Print Treatment Plan. Search client>Select client>go to Documentation view Tab. Right column Forms - Select “Client Treatment Plan Addendum”, double click/open selected date of “Client Treatment Plan Addendum”. Click on print>print current on the bottom right corner of the Console Widget Viewer. (“Print All” - **does not** print all reports just current selection.)

The screenshot shows the myAvatar NX interface. On the left, the 'FORMS' section is expanded, showing a list of forms including 'Client Treatment and Recovery Plan' and 'Client Treatment Plan Addendum'. The main area displays a table of client records with columns for Client, Episode, Date, and Description. A search box is open, showing results for 'client', 'BHRs Client Relationships', 'Client Treatment Plan Addendum', 'Client Treatment and Recovery Plan', and 'Update Client Data'. A 'Launch Report' button is highlighted in the bottom right corner of the Console Widget Viewer.



SCANNED DOCUMENTS (**NOT RESTRICTED)

Print out all scanned documents in the chart. (**EXCEPTION – **DO NOT** print documents any documents marked as **Restricted**, see example below). Search client > Select client > go to Documentation view Tab. Scroll down to Scanned Documents. Select and print scanned documents pertaining to subpoena or records request.

The screenshot shows the myAvatar NX system interface. The top navigation bar includes 'myAvatar NX', 'myDay', 'Documentation', 'Clinical', and 'REFERRAL QUEUE'. The client name 'TEST, JOLLY T JR (000938760)' is displayed. The left sidebar shows 'Recent Clients' and 'Recent Forms'. The central area displays a table of scanned documents with columns: Form Name, Document Description, Document Date, Document Episode, and Document Status. A red box highlights the 'Restricted - Other docs' document in the table. The right sidebar shows the 'CONSOLE WIDGET VIEWER' with a search bar and a list of document types. A red box highlights the 'Restricted - Other docs' checkbox in this list.

List of Documents that should NOT be released

- ✗ Conservator Investigation Reports
- ✗ Court Reports (Restricted)
- ✗ Maguire Correctional (Restricted)
- ✗ NMT (Restricted)
- ✗ Reports to CPS, APS (Restricted)
- ✗ Restricted - Other docs
- ✗ Restricted Tox Screen - HIV
- ✗ Restrictions Use/Disclosure of PHI-Form
- ✗ School Incident Reports (Restricted)
- ✗ Sexual History/HIV Assessment
- ✗ Sexual History (Restricted)
- ✗ Subpoenas (Restricted)