County of San Mateo Avatar

1. Client Lookup
2. Episode Opening
3. Client Relationship & Client Update
4. Episode Closing
AVATAR  Client Lookup
Steps

1. In the Search Client screen, enter the client’s last name, SSN, Birth date, Avatar ID or Alias

2. Avatar utilizes "Smart Search" all clients with the same last name or sounding like your client’s last name will appear. For the name “Test” there are 16. If there were more they would appear on the “Next 25"
3. By clicking on a client, it becomes highlighted (green).

4. Once selected, the client is placed in the “Recent Clients” box.
Episode is auto assigned and cannot be changed

Red=Required fields
Steps

1. After searching for a client with client lookup and if the client is not in the system, you are ready to open a new client.

2. Select **Admission Outpatient** form from your list of forms, the **Select Client** box should appear.
3. In the Select Client screen, enter the client's last name, first name, and sex. Click Search.

4. If a client is found, select the client, click OK. If a client is not found, the **No Matches found** box will display.

5. Click **New Client**.

6. The Auto Assign dialog display, Click **Yes** to generate an ID number.
The Admission (Outpatient) form is divided into 3 sections:

1. Admission
2. Demographics
3. Other Client Data

This section is currently not being used.
Avatar Admission (Section)

1. Date of Birth
2. Admission Date
3. Admission Time
4. Program
5. Type of Admission
6. Source of Admission
7. Primary Therapist/Counselor
8. SSN
9. Living Arrangements
10. Disabilities -1 (if None – Disabilities 2 & 3 are grayed out)
11. Disabilities- 2
12. Disabilities-3
13. Copy of Client Rights (Should always be Yes)
15. Advanced Directive Note
16. Admission Note
17. Team Assignment
18. Transition in Care
Even though this section is not required it is recommended that this form be completed with as much information as possible.

1. Client Last Name (auto populated)
2. Client First Name (auto populated)
3. Client Middle Initial
4. Suffix (if applicable)
5. Client’s Address
6. Client’s Zipcode
7. Client’s City
8. Client’s County
9. Client’s State
10. Client’s Home Phone
11. Ok to contact
12. Client’s Work Phone
13. Ok to contact
14. Client’s Cell Phone
15. Ok to contact
16. Primary Phone
17. Maiden Name (if applicable)
18. Marital Status
19. Occupation
20. Employment Status
21. Education
22. Email
23. Client Admission Packet Preference
24. Date Admission Packet Distributed
25. Smoking Status
26. Smoking Status Assessment Date (enter 01/01/2001)
27. Alias (8 available)
After completing the Demographics section, you're ready to save the form. Click submit to save the form.

Now you've just completed an Episode Opening.
Avatar  Client Relationship & Client Update
BHRS Client Relationship

Red=Required fields
Select **BHRS Client Relationship** form from your list of forms, the **Select Client** box should appear.

Enter Client ID or Type in last name, first name.

Select the Client.
The BHRS Client Relationship form has 2 sections

1. Entry Date

2. Relationships

Warning: Information is viewable by all Mental Health and AOD Providers
BHRS Client Relationship (adding a new contact)

To add a new contact, click “Add New Item”

1. Type of Relationship
2. Last Name/Agency Name
3. Other Relationship
4. First Name
5. Address – St.
6. City
7. State
8. Zip Code
### BHRS Client Relationship (adding a new contact)

<table>
<thead>
<tr>
<th>Field</th>
<th>Details</th>
</tr>
</thead>
<tbody>
<tr>
<td>9. Home Phone</td>
<td></td>
</tr>
<tr>
<td>10. Cell Phone</td>
<td></td>
</tr>
<tr>
<td>11. Work Phone</td>
<td></td>
</tr>
<tr>
<td>12. Email Address</td>
<td></td>
</tr>
<tr>
<td>13. Best #/Time to Contact</td>
<td></td>
</tr>
<tr>
<td>14. Release Available</td>
<td>(3 Choices-Full, Limited, Verbal)</td>
</tr>
<tr>
<td>15. Release Start Date</td>
<td></td>
</tr>
<tr>
<td>16. Release End Date</td>
<td></td>
</tr>
<tr>
<td>17. Legal Guardian</td>
<td></td>
</tr>
<tr>
<td>18. Emergency Contact</td>
<td></td>
</tr>
<tr>
<td>19. Next of Kin</td>
<td></td>
</tr>
<tr>
<td>20. Notes:</td>
<td>(if Limited or Verbal field becomes required)</td>
</tr>
</tbody>
</table>

Click “Submit” to save form.
Client demographics updates are done utilizing the Admission Outpatient Form – (Demographics section)

1. Client Last Name (auto populated)
2. Client First Name (auto populated)
3. Client Middle Initial
4. Suffix (if applicable)
5. Client’s Address
6. Client’s Zipcode
7. Client's City
8. Client’s County
9. Client’s State
10. Client’s Home Phone
11. Ok to contact
12. Client’s Work Phone
13. Ok to contact
14. Client’s Cell Phone
15. Ok to contact
16. Primary Phone
17. Maiden Name (if applicable)
18. Marital Status
19. Occupation
20. Employment Status
21. Education
22. Email
23. Client Admission Packet Preference
24. Date Admission Packet Distributed
25. Smoking Status
26. Smoking Status Assessment Date (enter 01/01/2001)
27. Alias (8 available)

Use this field to enter ALIAS information only
Avatar Episode Closing
Episode Closing - Discharge (Outpatient)

Red=Required fields
In the Select Client screen, enter the client name or ID, and select. Click Select.
1. In the Date Of Discharge field, enter the date the client will be discharged.
2. In the Discharge Time field, enter the discharge time. Use Current if specific time is not required.
3. The Discharge Day Of Week field shows the discharge day (will pre-populate).
4. The Length Of Stay field shows the episode length in days (will pre-populate).
5. In the **Type of Discharge** field, select the discharge type. (Required)
6. In the **Discharge Practitioner** field, enter the practitioner name or ID, and select. (Required)
7. In the Discharge Remarks/Comments field, enter discharge comments or observations (if applicable).
8. In the Hospital Discharge Instructions, enter any comments (If applicable).
9. Select, Discharge Client Living Arrangement
10. Update Client Demographics if at discharge they have changed.

When finished, click **Submit**.