SAN MATEO COUNTY HEALTH
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Netsmart
myAvatar™ NX

Issue 10
March 2025

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.

Return to Table of Contents

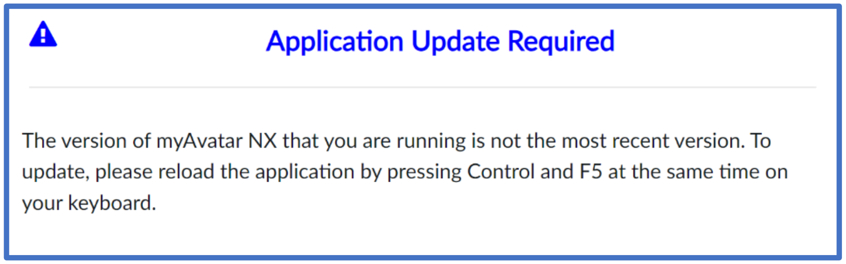
Clicking on this button (located at the bottom of each page) will return you to the Table of Contents (page 1).

Section 1

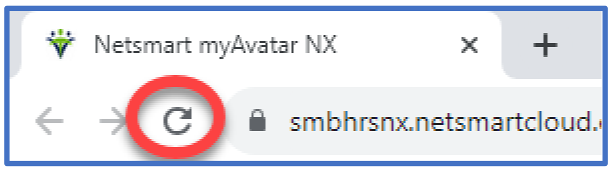
Avatar NX: The Basics

Accessing Avatar NX

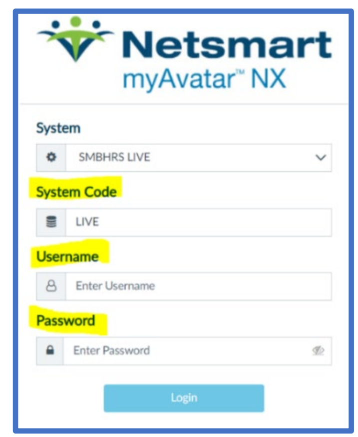
1. “Application Update Required” Notice



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.

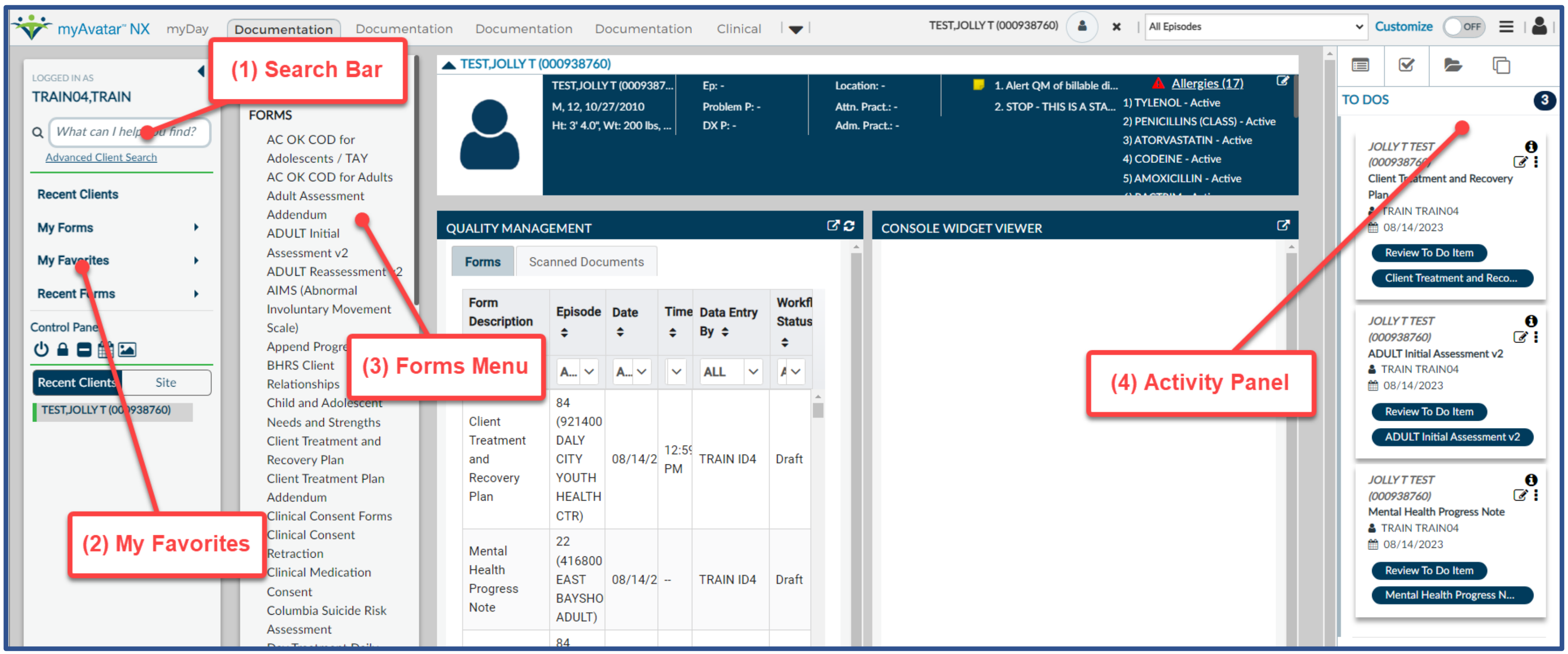
- Please make sure that **System Code** field is set to the System Code that you were assigned (e.g., LIVE, LIVESMMH, LIVEEC, etc.). If you are unsure of what code you were assigned, contact BHRS IT.

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

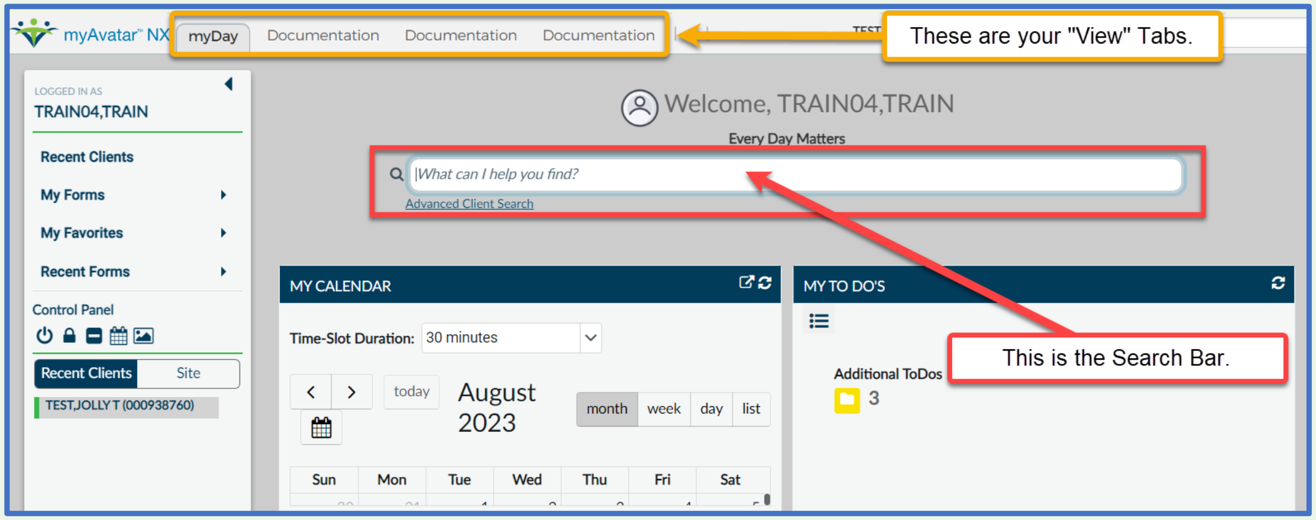
Menus and Task Bars

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

	(1) Search Bar	(2) My Favorites	(3) Forms Menu	(4) Activity Panel
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.

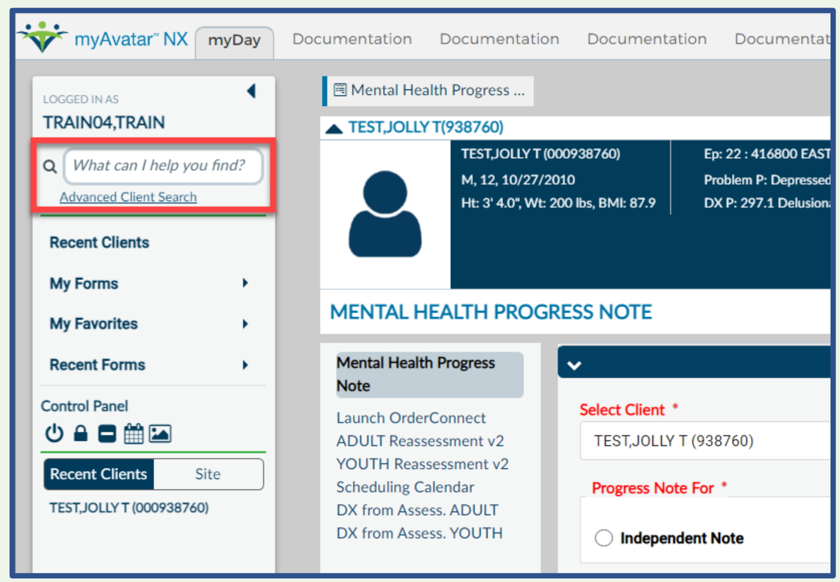


(1) Search Bar



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

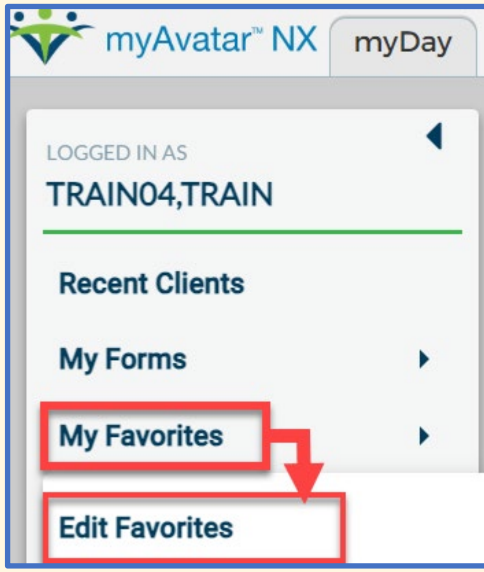
The search bar is on the top left side panel when you are in any of the other view tabs or have a frm open.

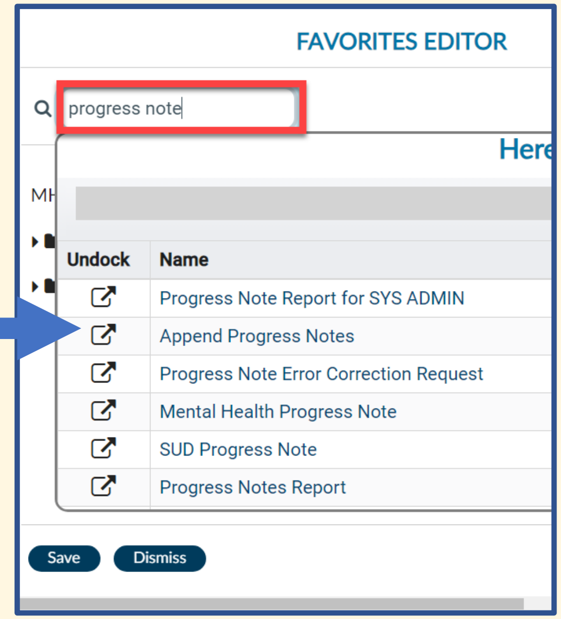


(2) My Favorites

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.





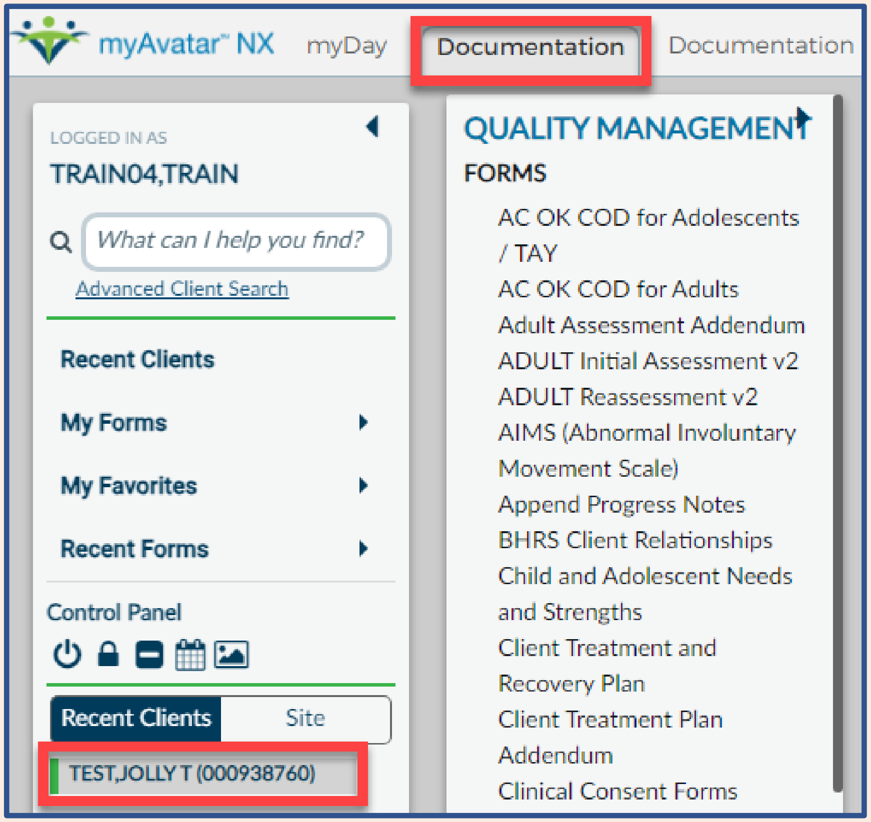
You can organize your forms by creating folders using the “Add Folder” feature on the top right of the pop up window. Use the “Edit” button to rename the folder.

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.

(3) Forms Menu

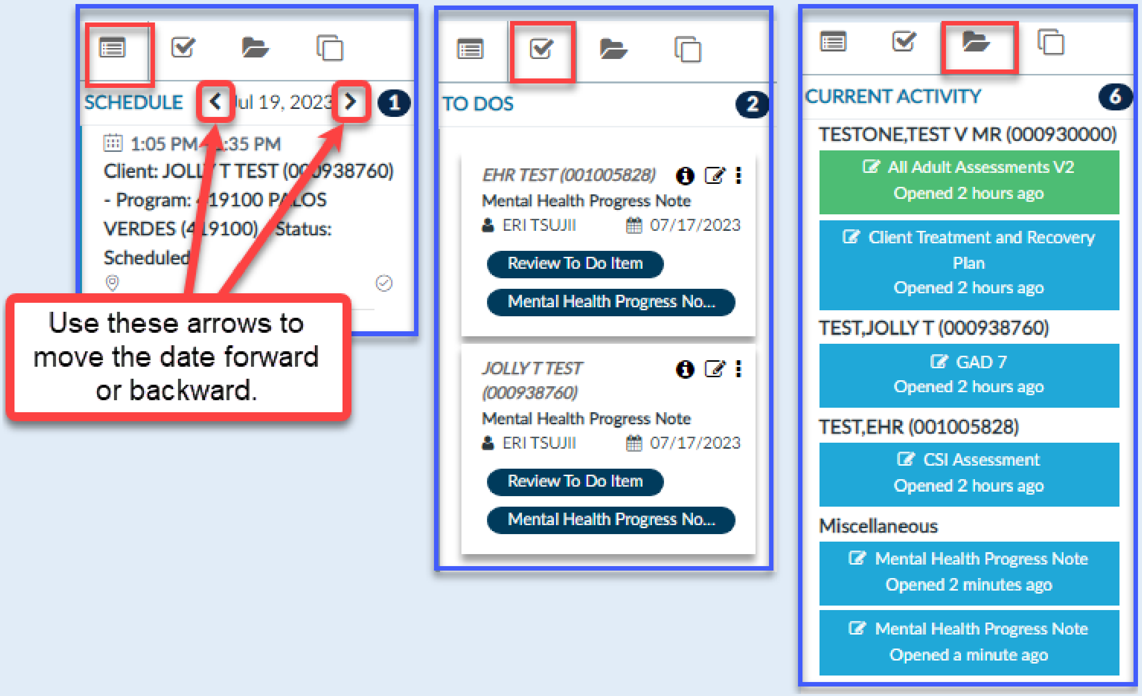
In the old Avatar, there was a menu bar that listed all the documents available to view/open was always visible whenever the application was open. With Avatar NX, **the menu bar is still there** but it's only visible after you select a client.

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).



(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.

Customizing Your Views (including Widgets!)

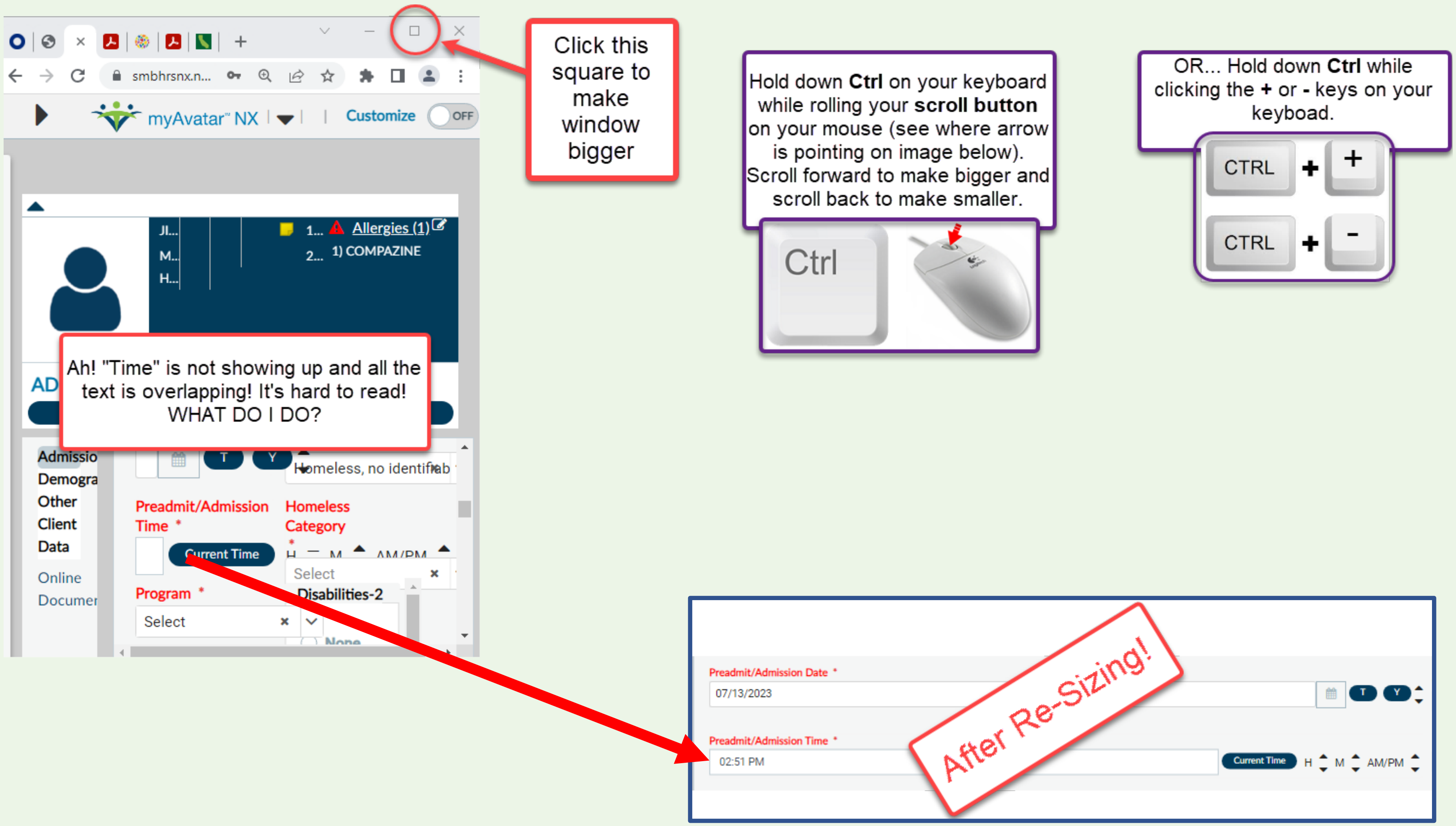
4. Ways to adjust how Avatar NX looks.

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.

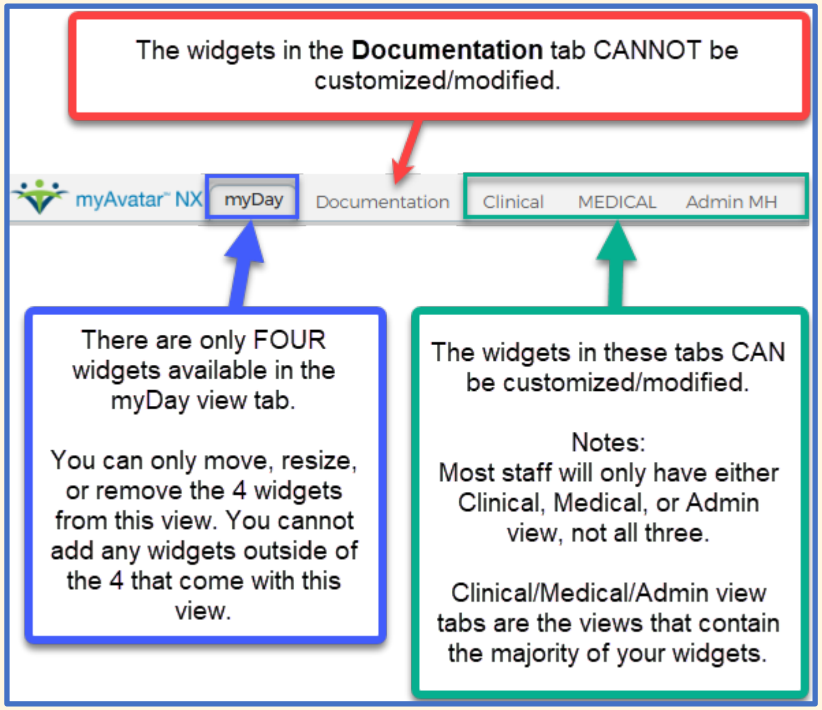
Zooming In/Out

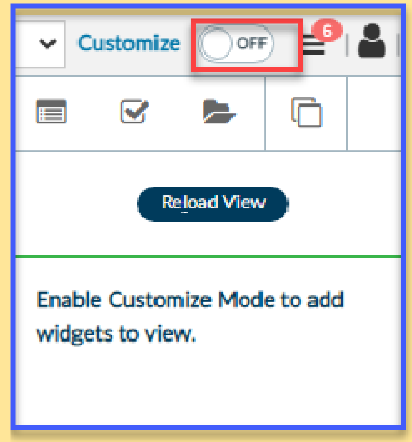
Can't input date or time into date/time fields? Text overlapping in the window? Before submitting a support request to IT/QM, see if magnifying or reducing the size of the window/text solves the issue. For example:



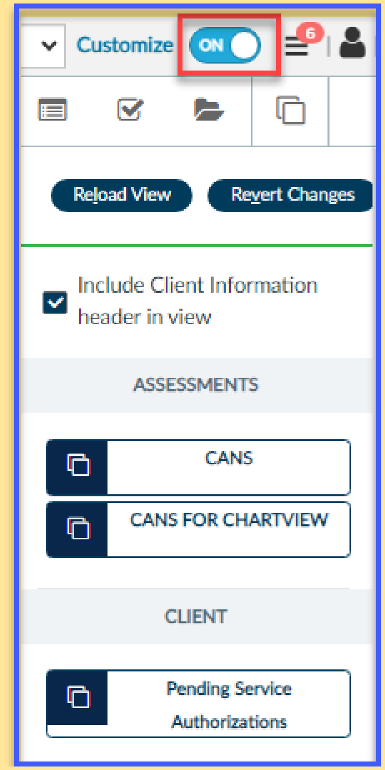
Customizing Widgets

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."





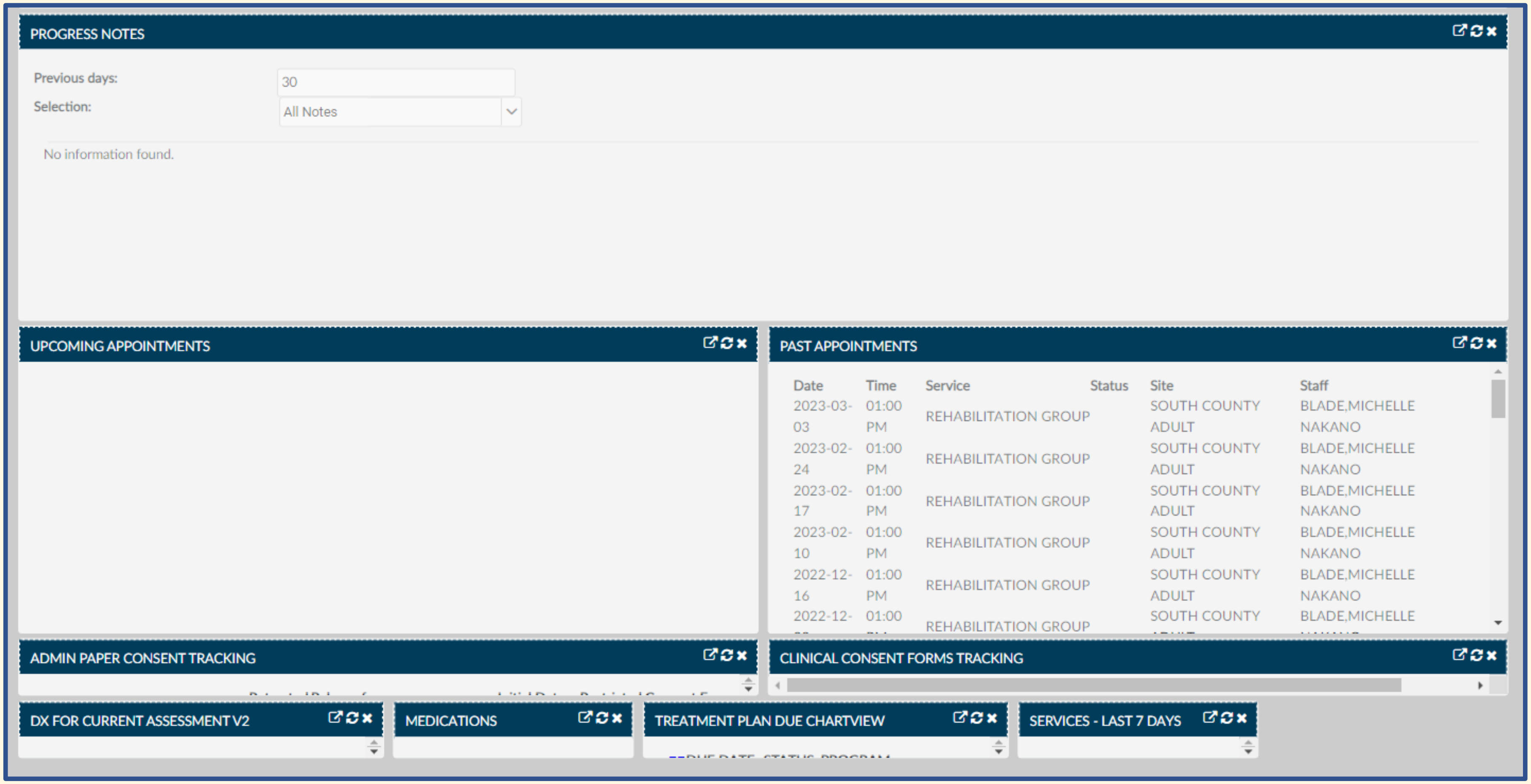
Click on the ON/OFF button to be able to customize the widgets. "ON" means you are going to edit. After you edit, click the switch to "OFF" to save your changes.



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.

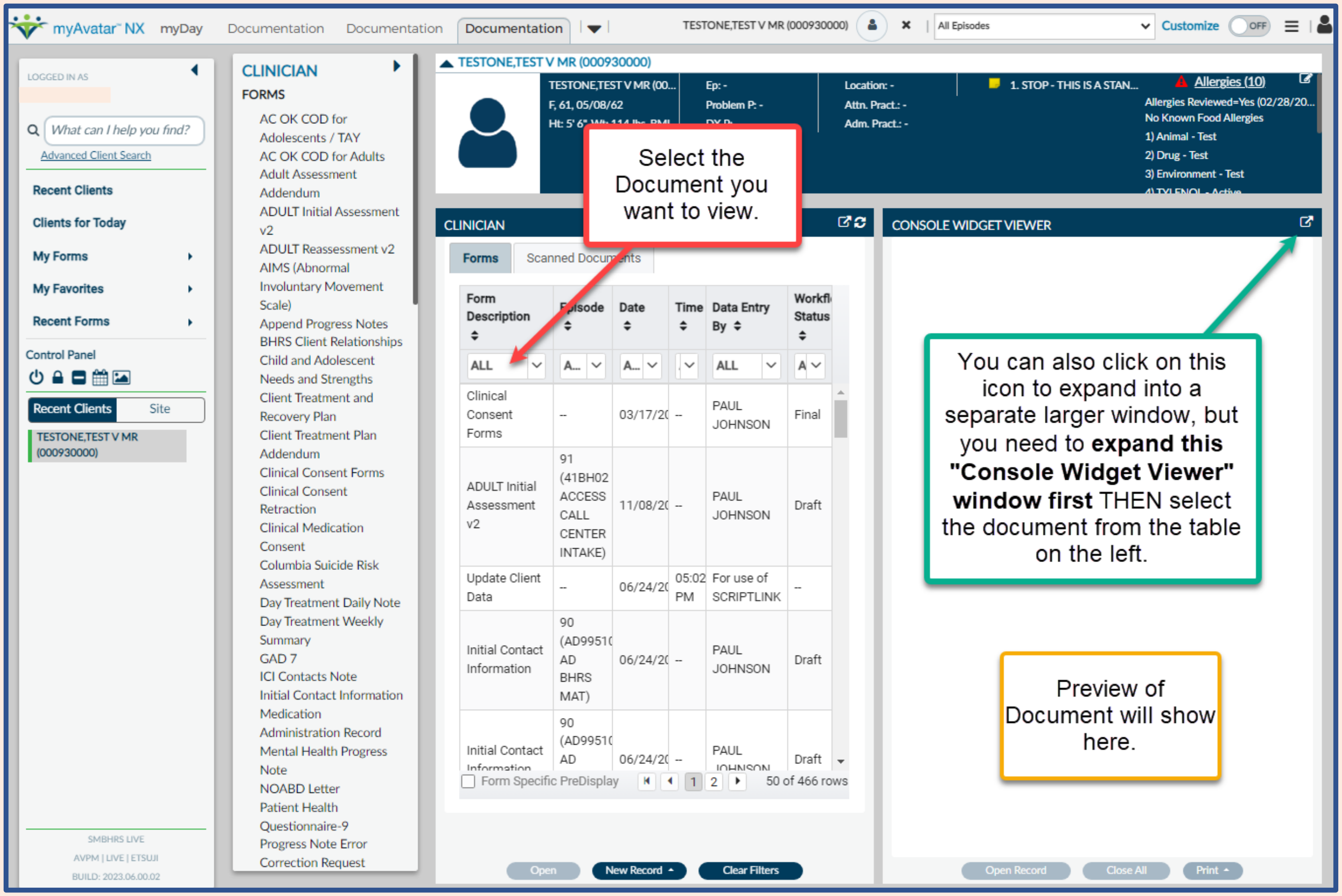
Sample Customization of Widgets: You can see that some were extended to be larger, and for those widgets that I would prefer to just expand into a separate window, I've made them small enough to just show the widget name and icons that allow me to refresh/delete/open in a separate window. Once you're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



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 located on the top right corner of the widget, **THEN select the form**. See screenshot below.



Exception: The Console Widget Viewer preview window currently does **not** function properly for any Assessments (PreCalAIM or CalAIM).

Use "Launch Report" or run "CalAIM" Assessment Reports for CalAIM Assessments.

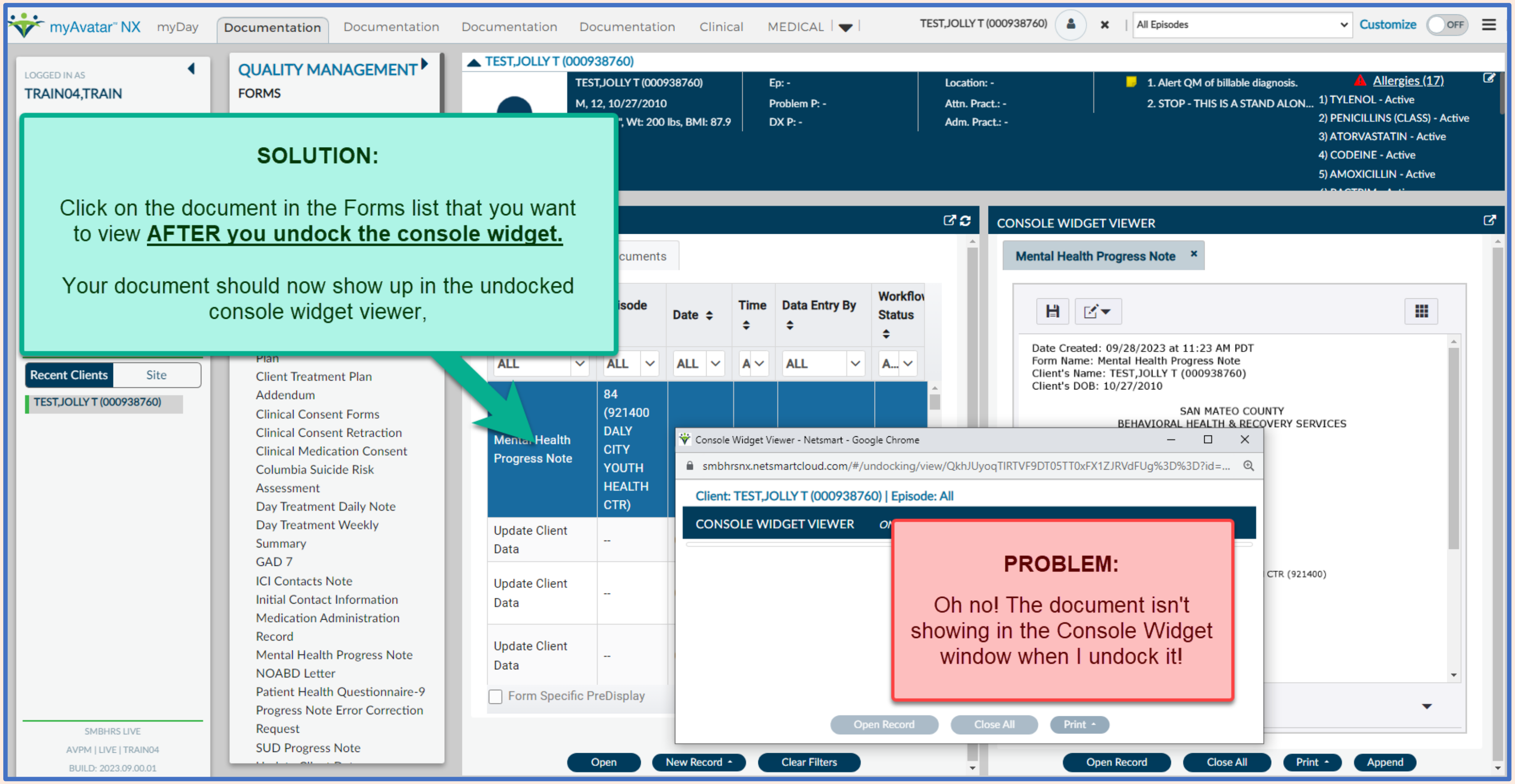
Run "PreCalAIM" Assessment Reports for PreCalAIM Assessments.

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

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

5. Finding Clients in NX

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

<table>
<tr><th>Basic Search Using Search Bar</th><th>Advanced Search</th></tr>
<tr><td>

- Center of MyDay View Tab screen
- Left hand side panel of NX

</td><td>

- Available on some forms but not all

</td></tr>
<tr><td>

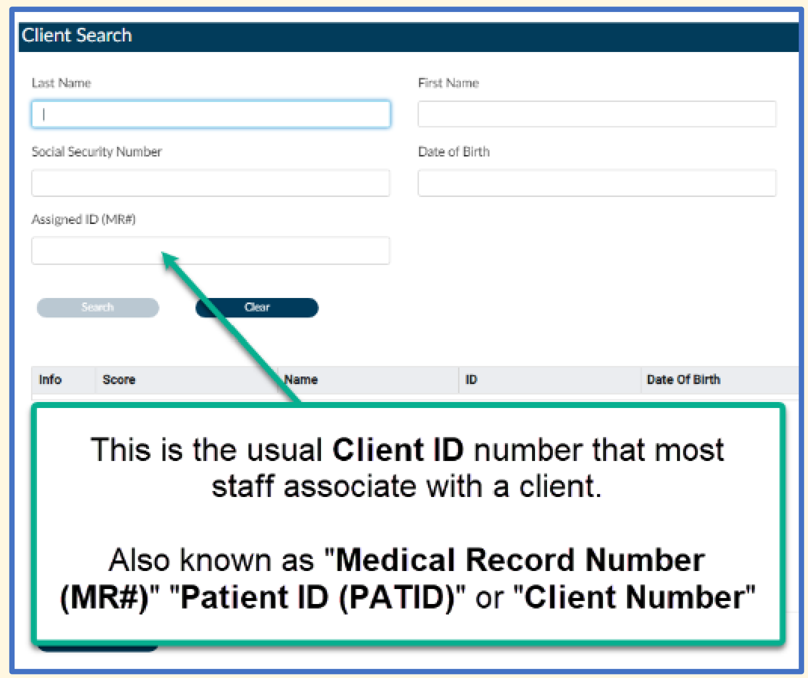
Type your client's name or MR# in the search bar to pull up your client's name. Double click on their name and you will be able to view your client's chart.

See Search Bar section for information on where to find the search bar.

</td><td>

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#).



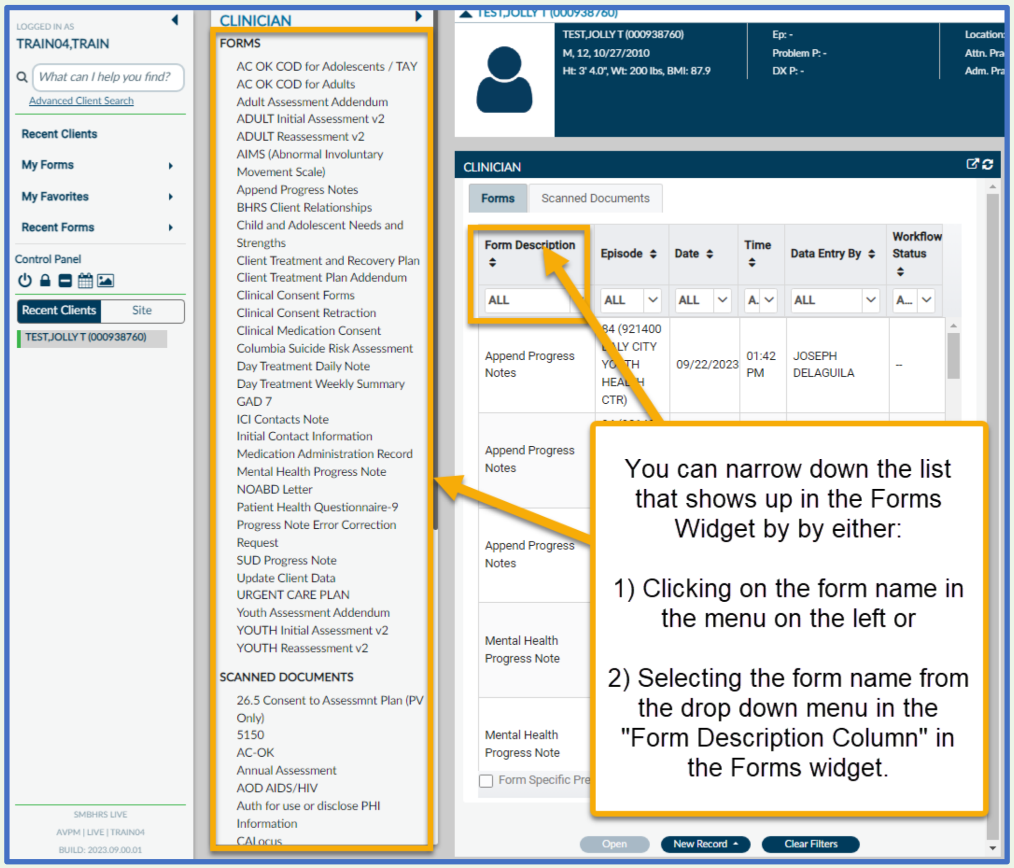
</td></tr>
</table>

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**
- **Forms that were created directly in Avatar.**

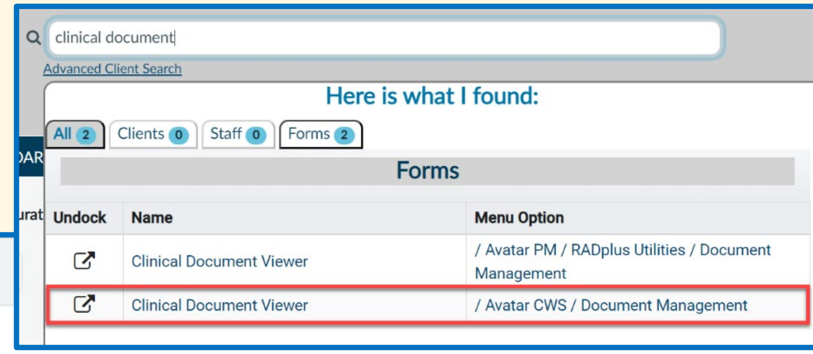
First, select either the "Forms" or "Scanned Documents" tab depending on the type of document you want to view.

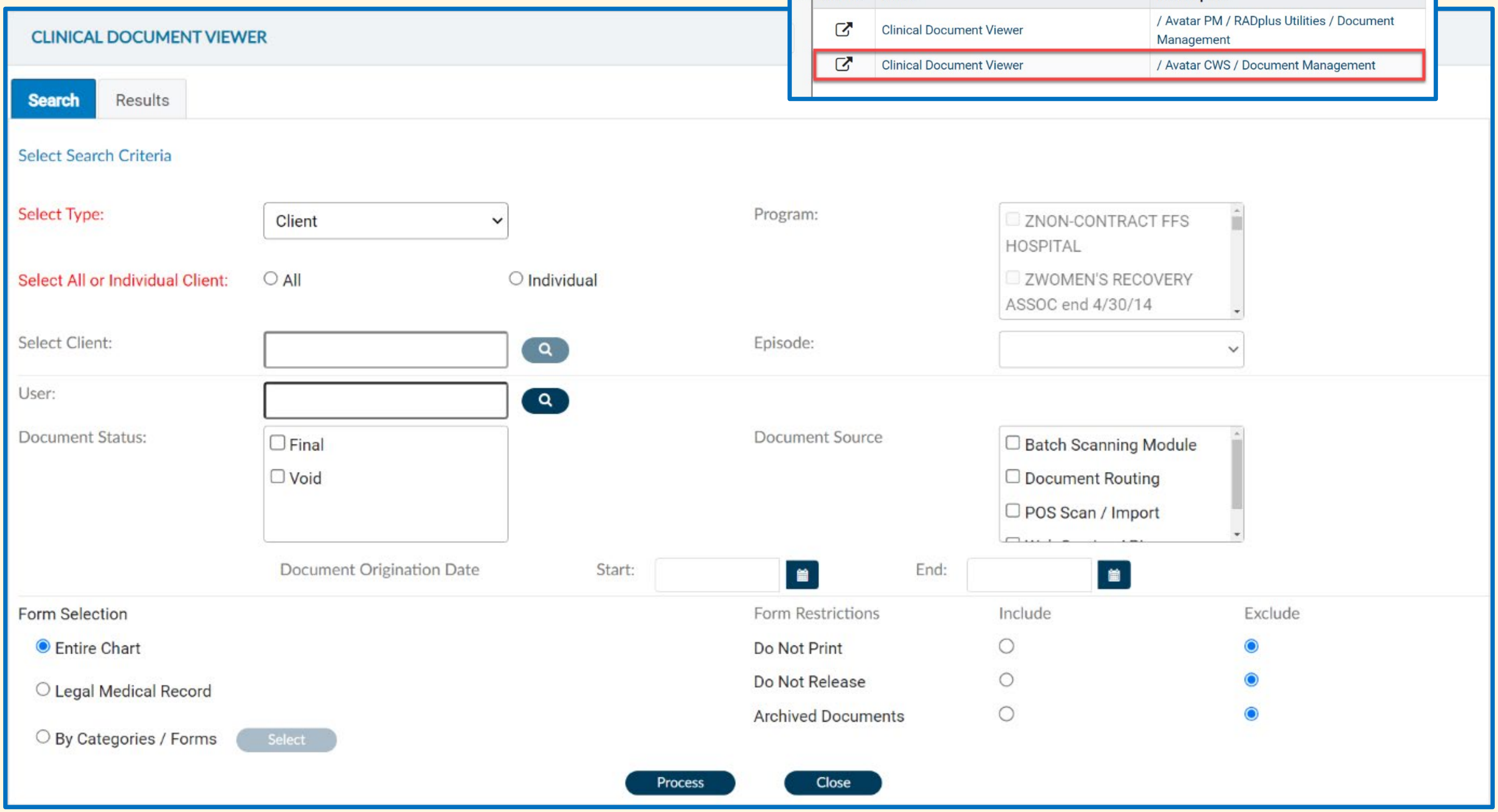
Once you select the tab you want, you can further filter by clicking on the desired document on the forms menu or using the drop down menu in the "Form Description" column.

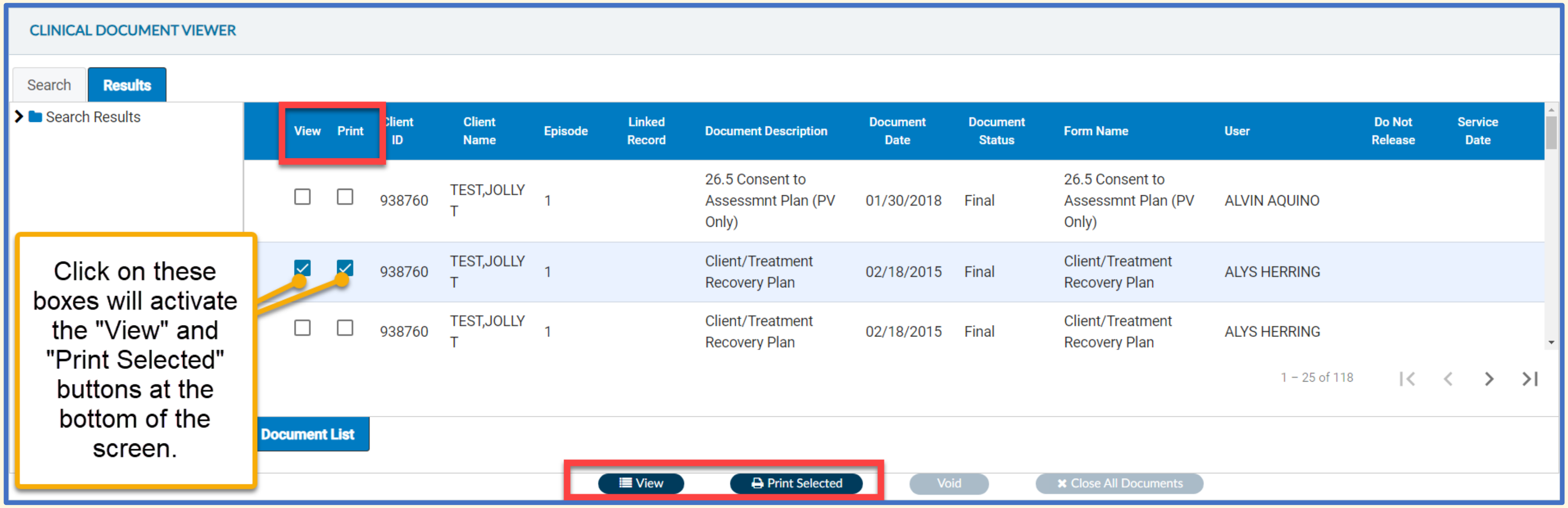
When you find your document on the list, double click it and it will show up in the Console Viewer to the right of the Forms Widget.

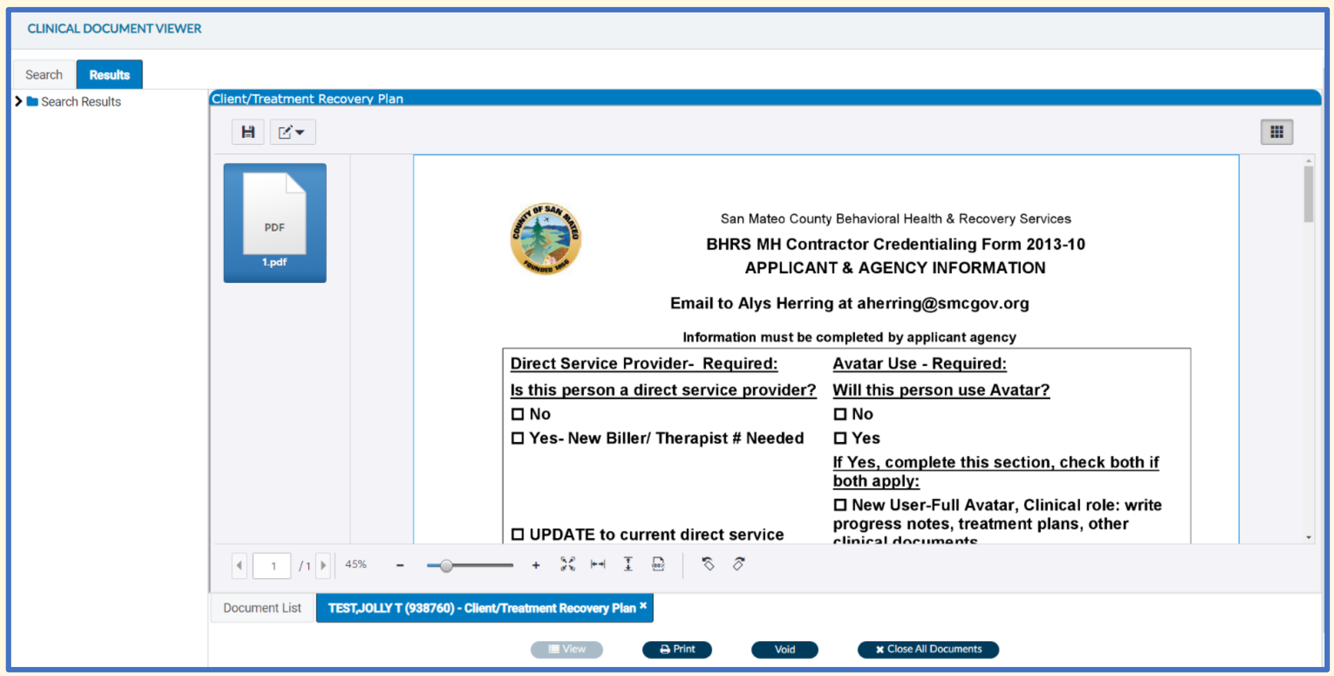
Clinical Document Viewer

To view scanned documents, you can either use the Scanned Documents Tab in the Forms Widget described in the previous page, or you can use the Clinical Document Viewer. To access the Clinical Document Viewer, search for “Clinical Document Viewer” using the search field and complete the form.





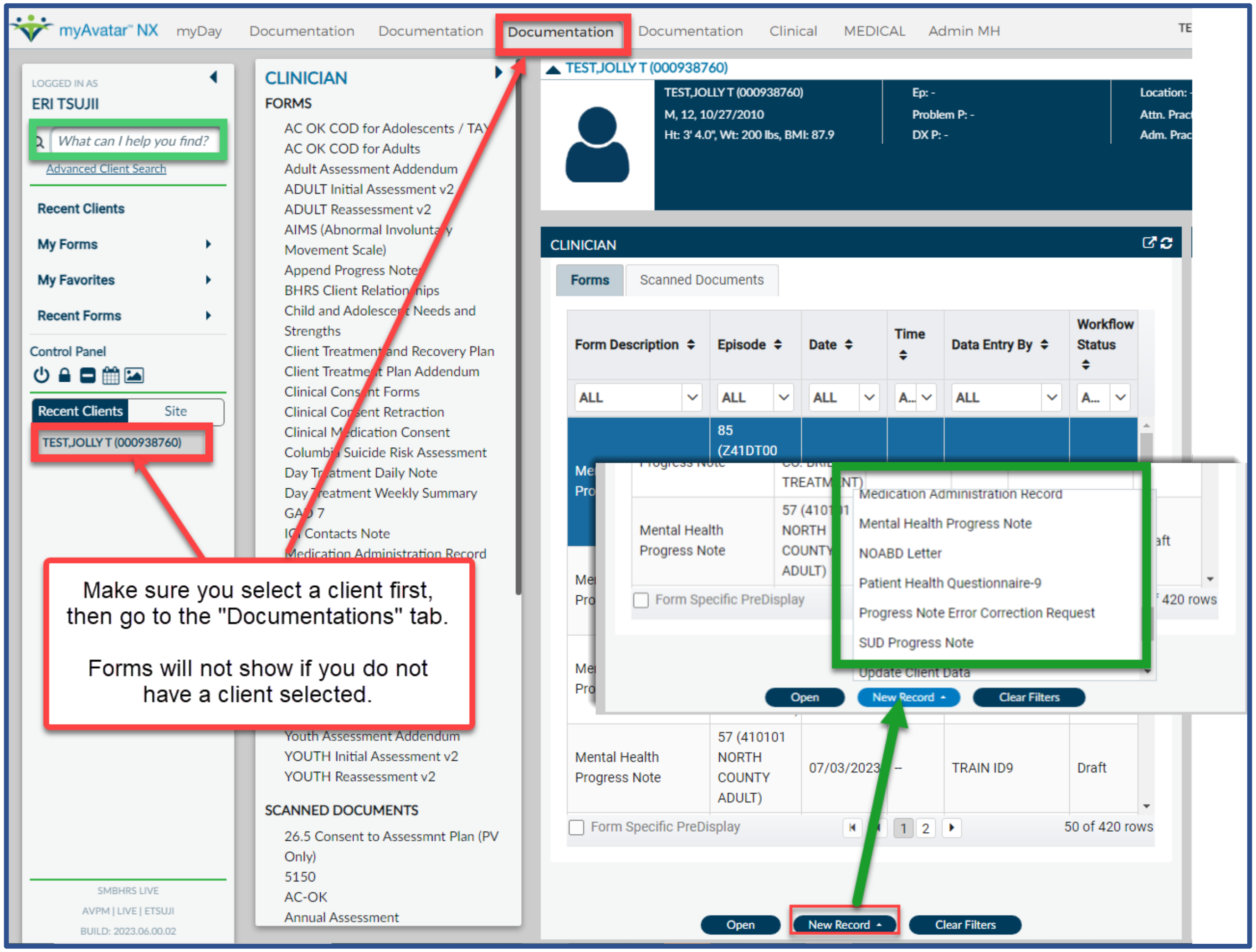




Return to Table of Contents

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.

8. How to Open Multiple Forms for the Same Client

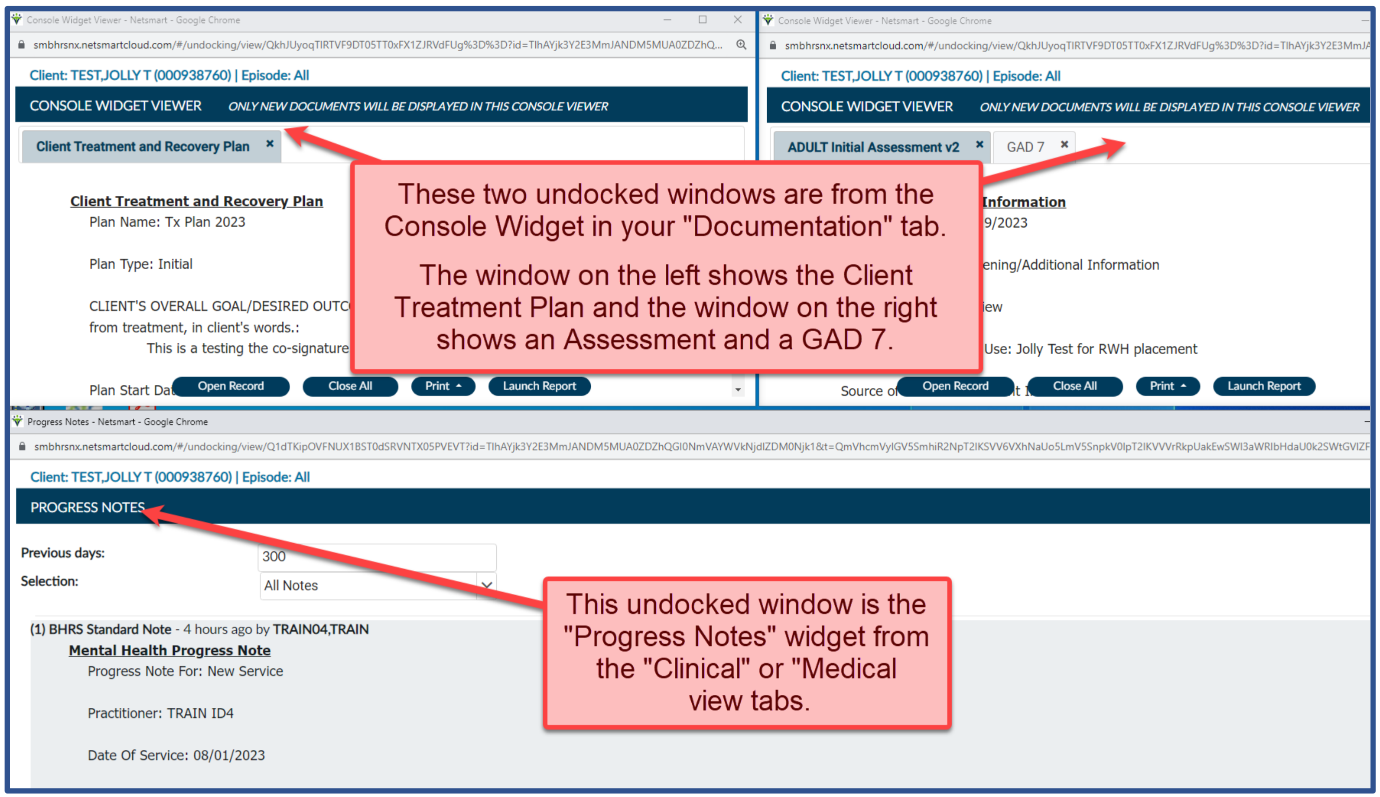
Sometimes you might be working on a client's chart and would like to view multiple documents for the same client simultaneously (e.g., while you are working on an assessment, you want to view the latest treatment plan, last assessment, and progress notes).

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 Undocking Widget section for information on how to undock the widget.

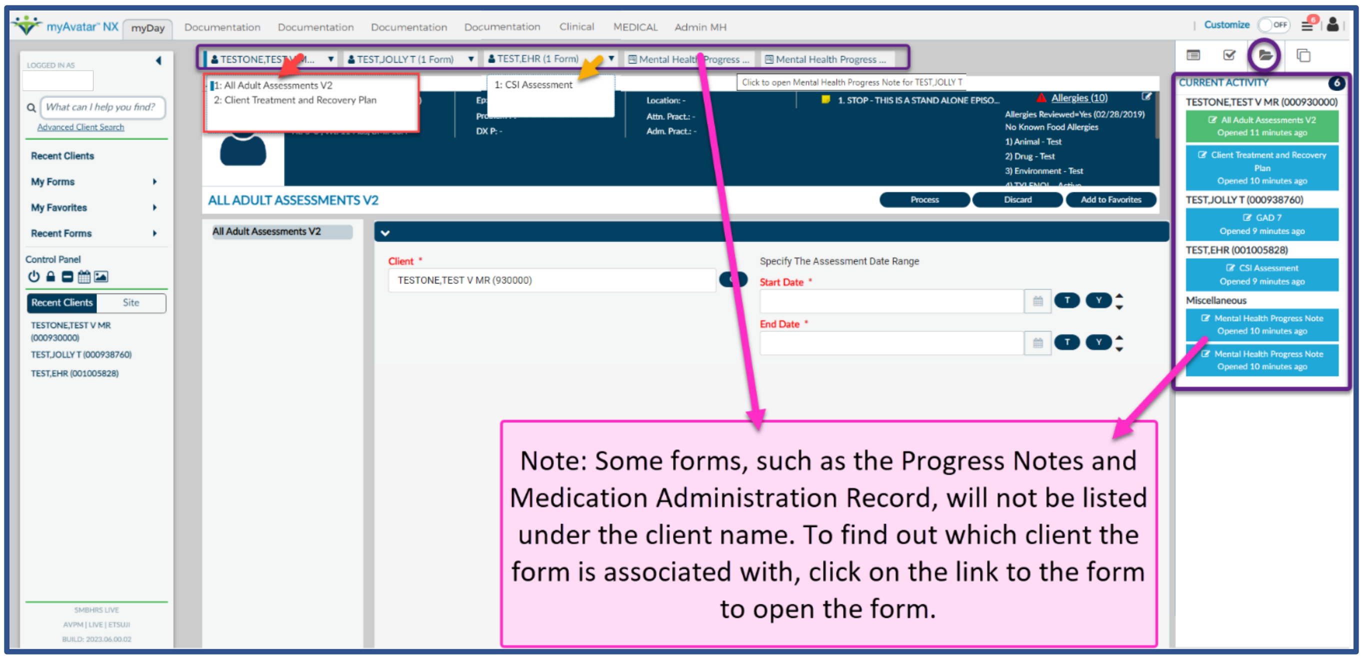


9. How to Open Multiple Charts/Forms for Multiple Clients in Avatar NX.

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).



Return to Table of Contents

Section 3

Printing and Scanning

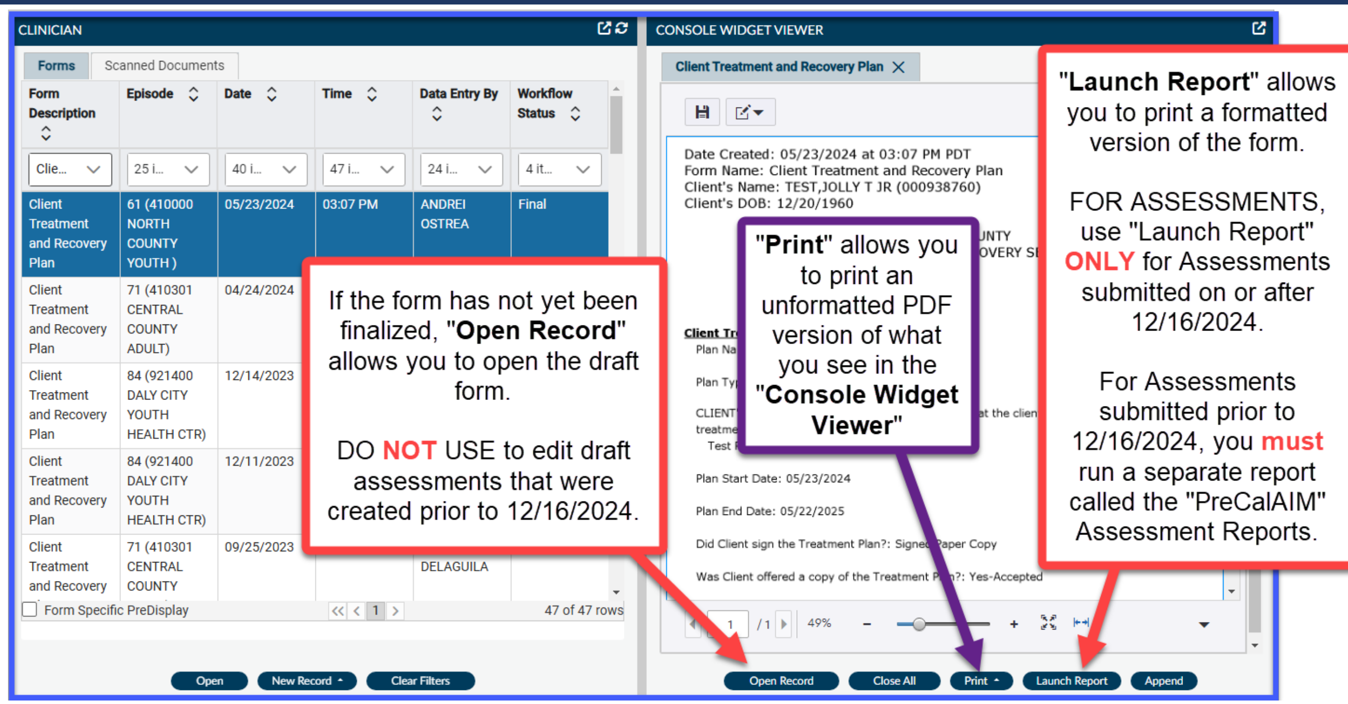
Printing Reports / Formatted Versions of Forms

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

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 "Co-Signature" section for more information on Document Routing.



Printing Formatted Versions of Individual Forms

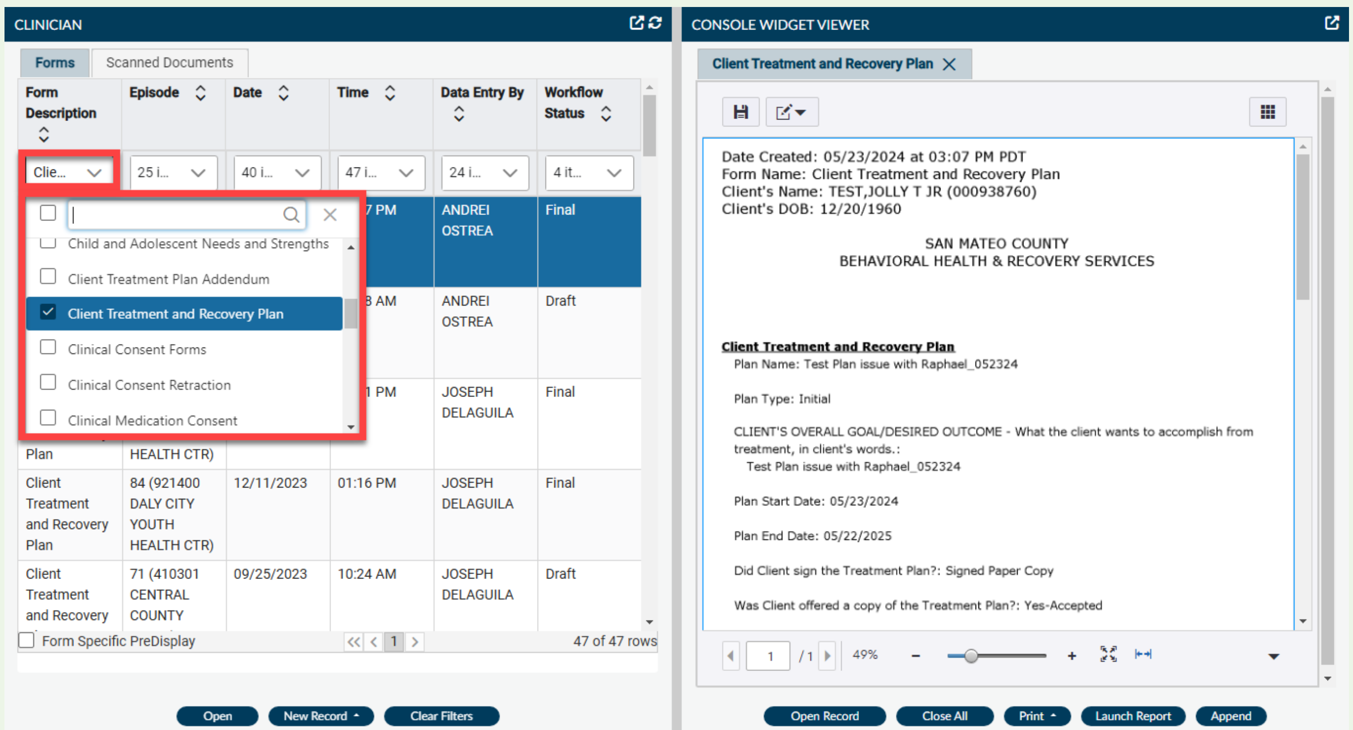
Some forms (but not all) will display a “Launch Report” button on the bottom right of the “Console Widget Viewer.”

*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.

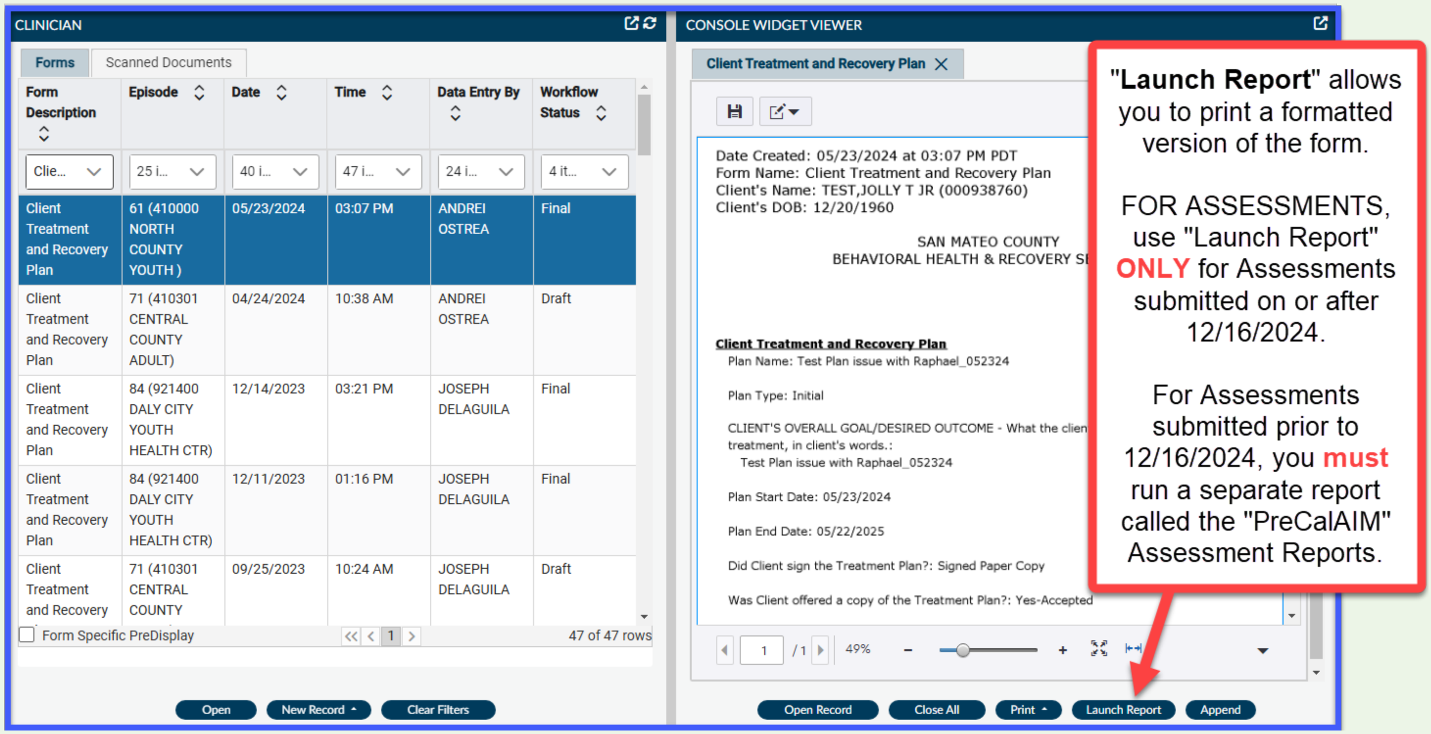
*To view the full contents of any assessment submitted prior to 12/16/2024, do NOT use the Console Widget Viewer or the “Launch Report” button. You **MUST** print a report using the “PreCalAIM” versions of the assessment reports. See list of reports in the Frequently Used Forms for MH Staff section of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

Step 1) Select a client.

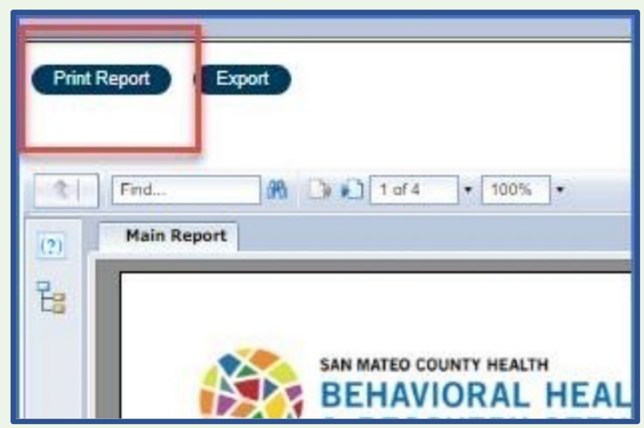
Step 2) Click on the **Documentation** Tab. You should see the Forms widget and a Console Widget viewer. Click on the drop down menu from the “Form Description” column of the forms widget and select the type of form you’re looking for.



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

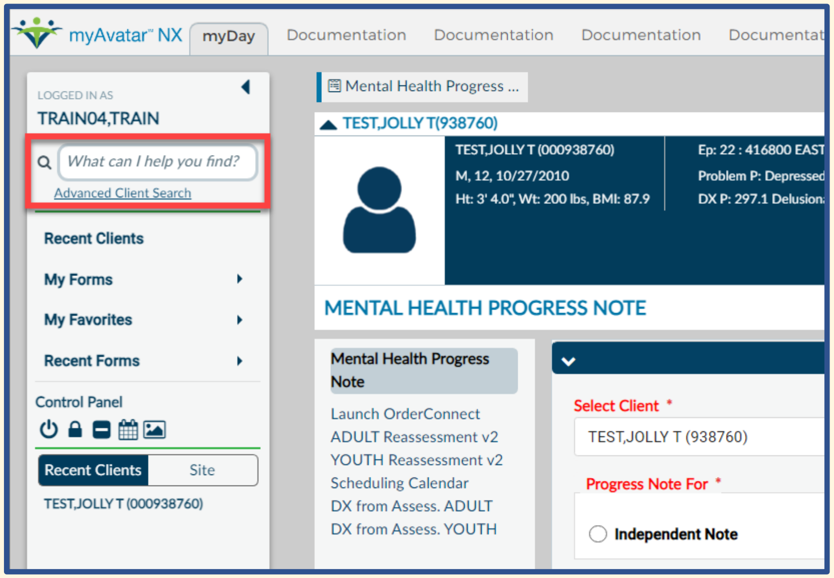


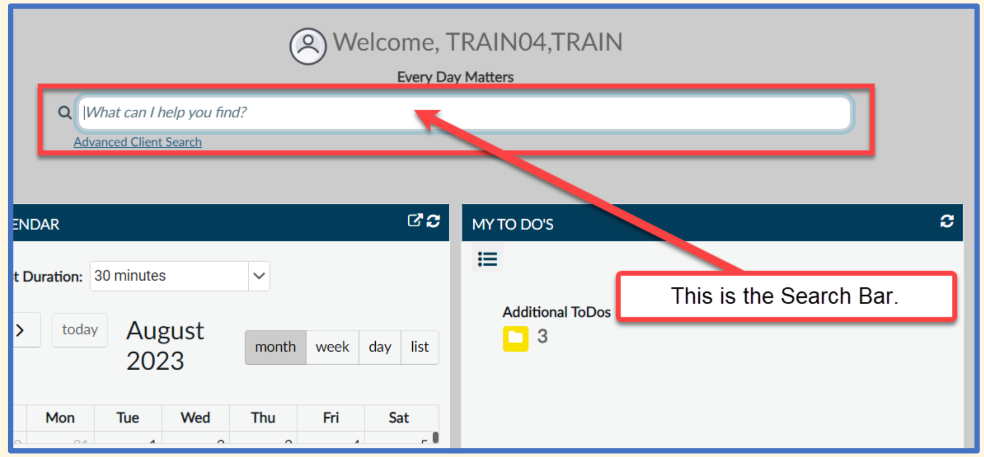
Step 4) Click on "Print Report" located on the top left corner of the window to print a copy for your client.

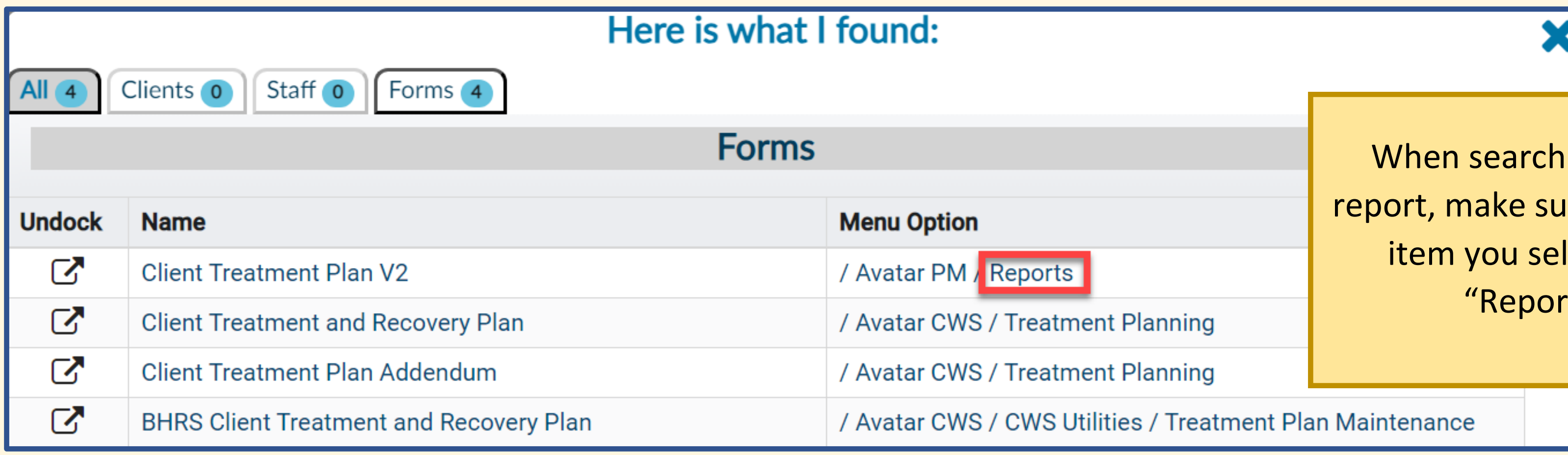


Printing Formatted Versions of Multiple Forms

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 Frequently Used Forms for MH Staff section of this manual. You can add these reports to your "Favorites" to easily access them in the future.



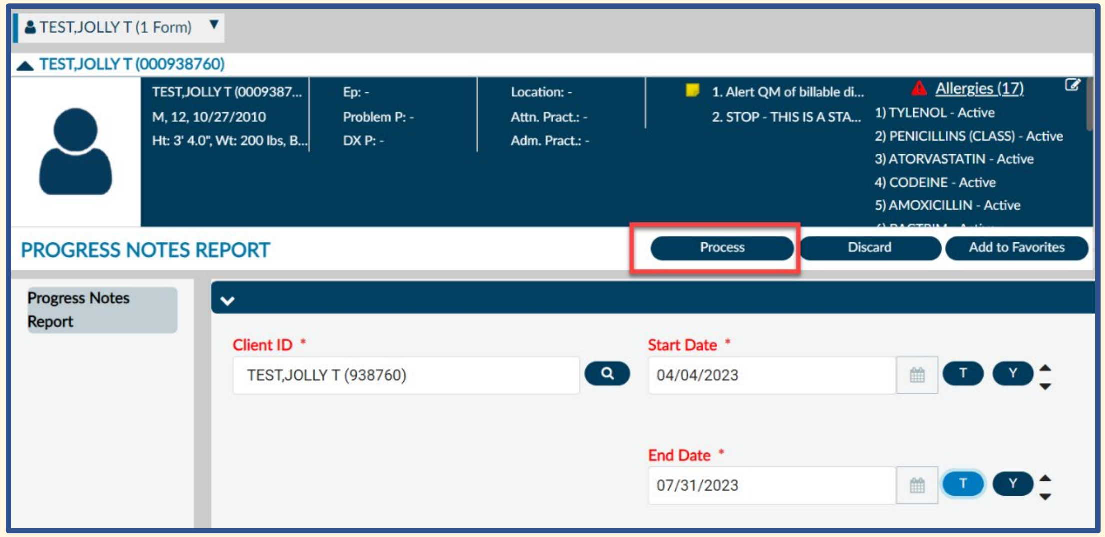




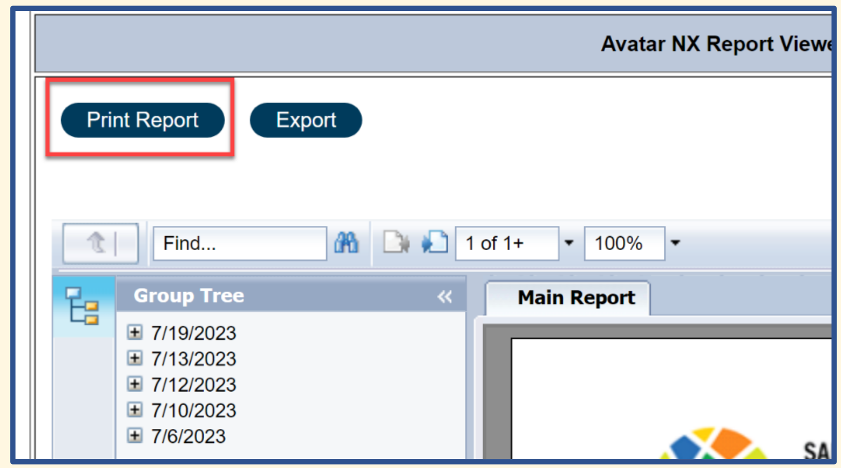
When searching for a report, make sure that the item you select is a "Report"

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.

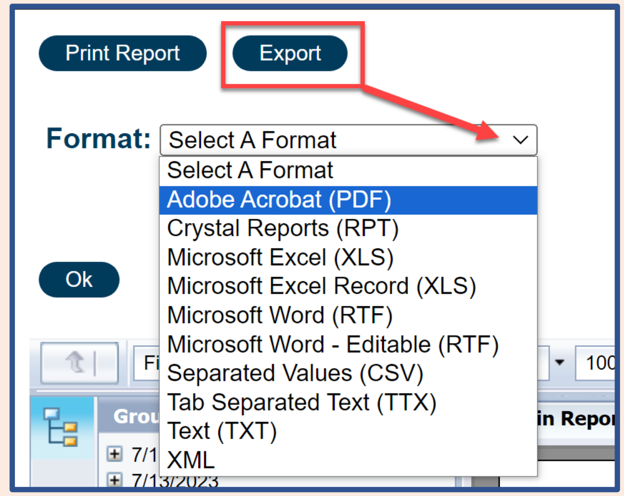


New Feature for Progress Notes Report!

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.

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.

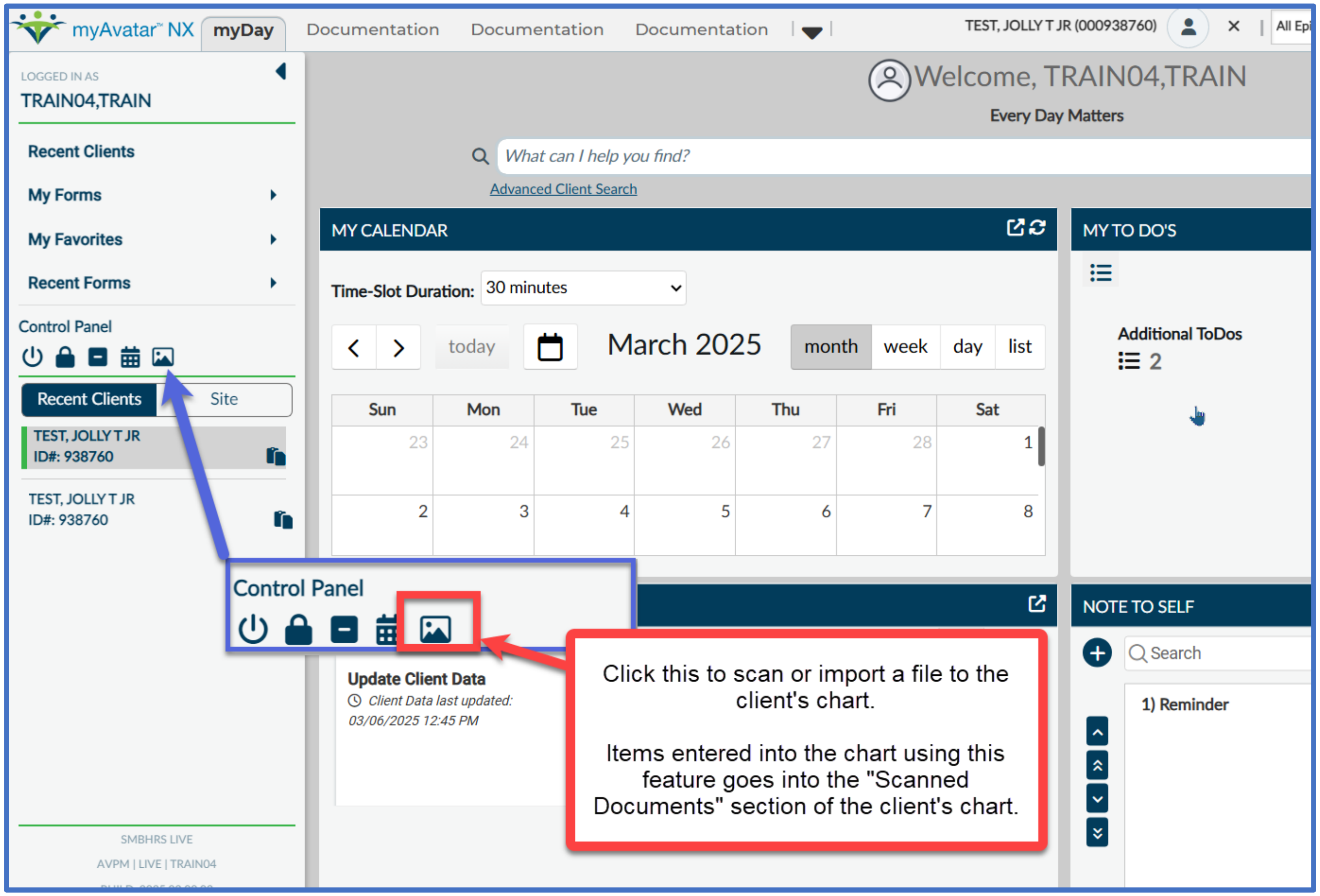


Use the page range feature to specify which pages to print. If you are not sure of which pages to select, scroll through the pages in the preview image and use the page number field to determine the page of the progress note you would like to print.

Return to Table of Contents

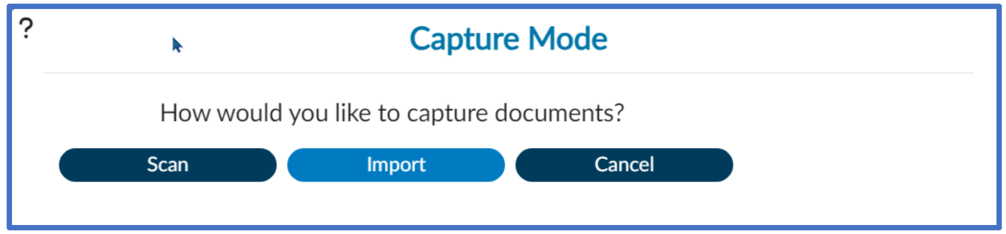
11. How do I scan documents into Avatar?

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

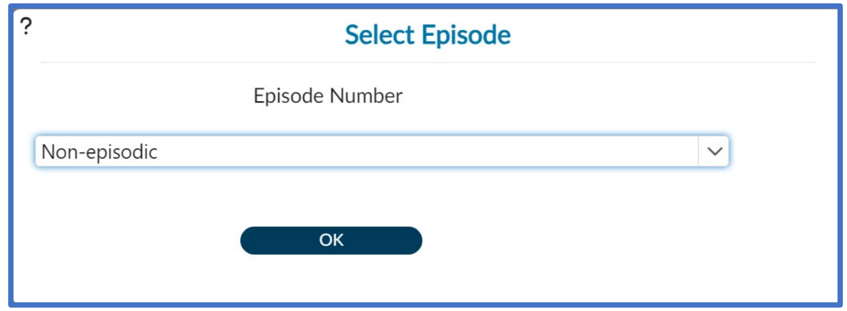


Return to Table of Contents

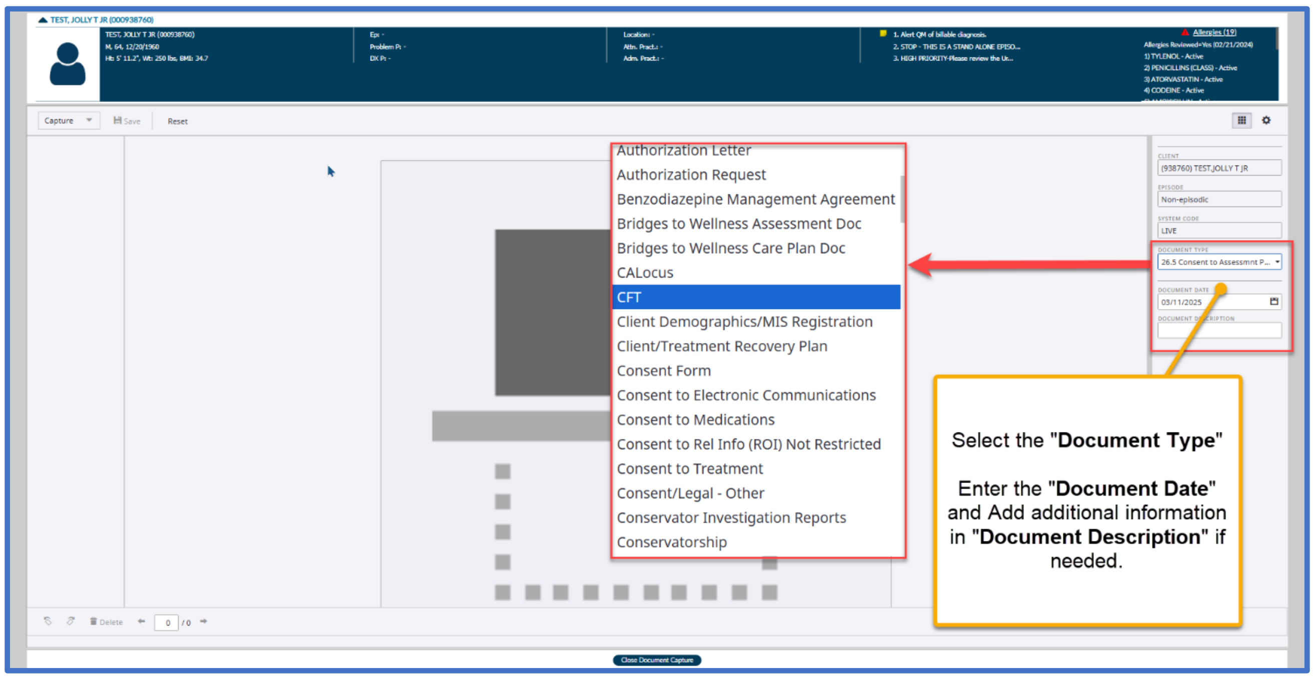
Step 2) Select if you will be scanning a document using a scanner or importing a file from your computer.



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."

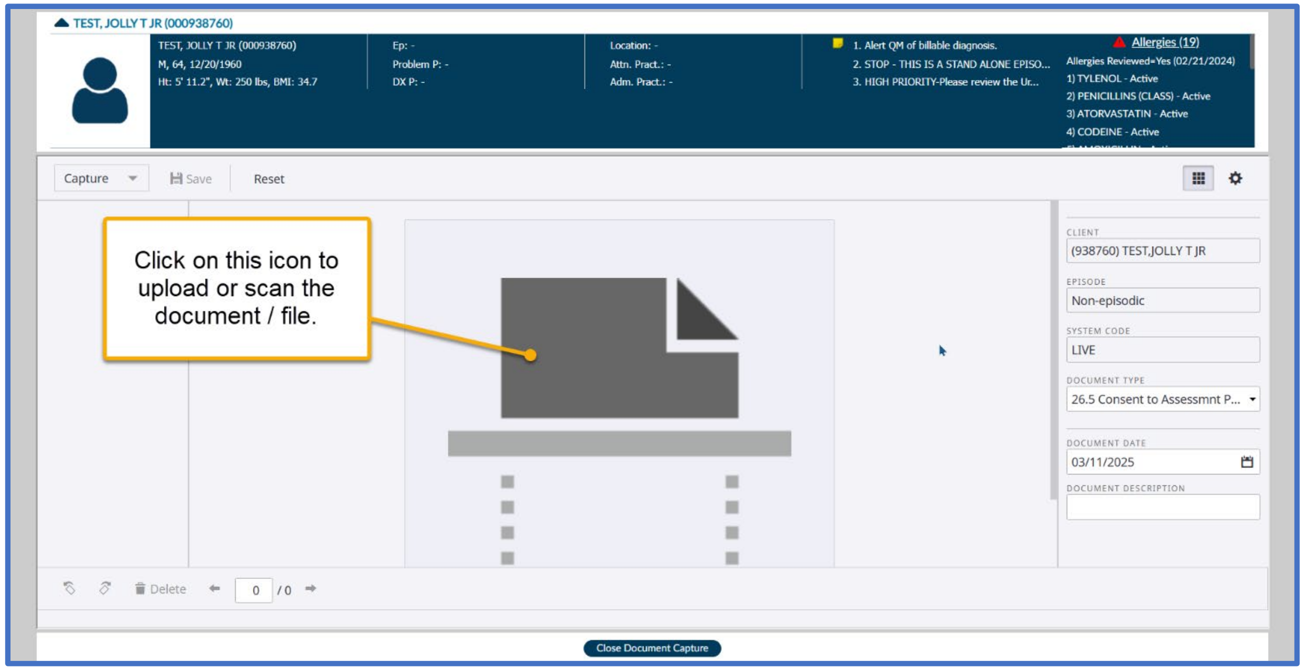


Step 4) Complete the 'Document Type" "Document Date" and "Document Description" fields.

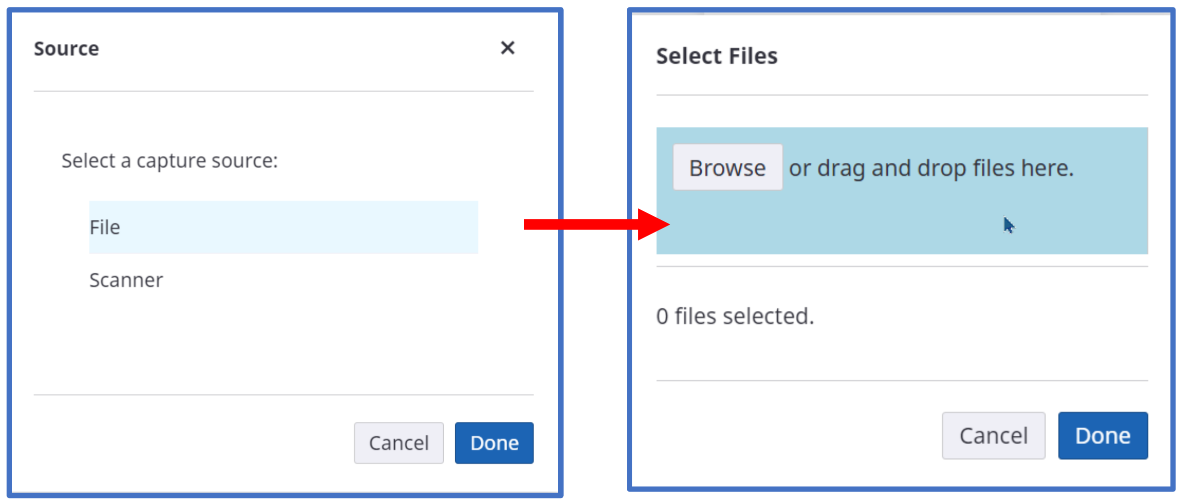


Return to Table of Contents

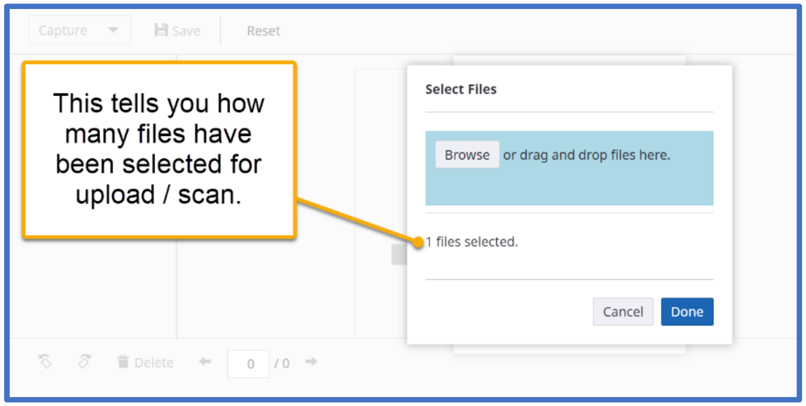
Step 5) Click on the large icon at the center of the screen to begin process of scanning or uploading document.

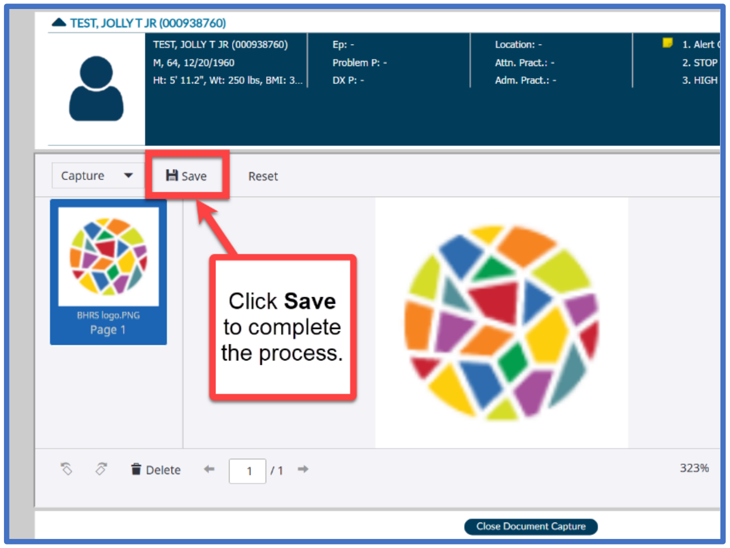


Step 6) Select whether or not you will be scanning or importing a file. If importing a file from your computer, either find the file using the "browse" button or drag and drop the file into the box.

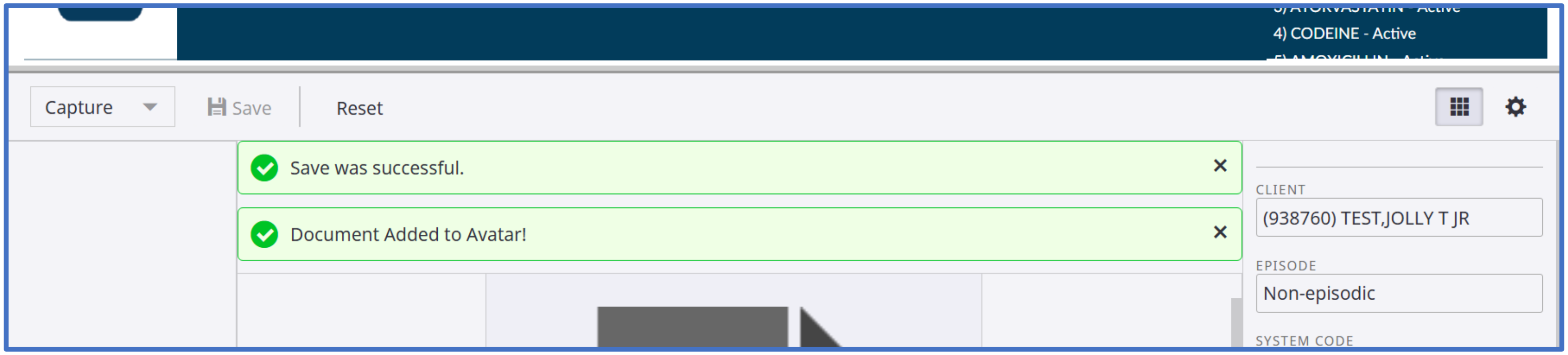


Step 7) After verifying that you uploaded the files you want, click "Save"





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



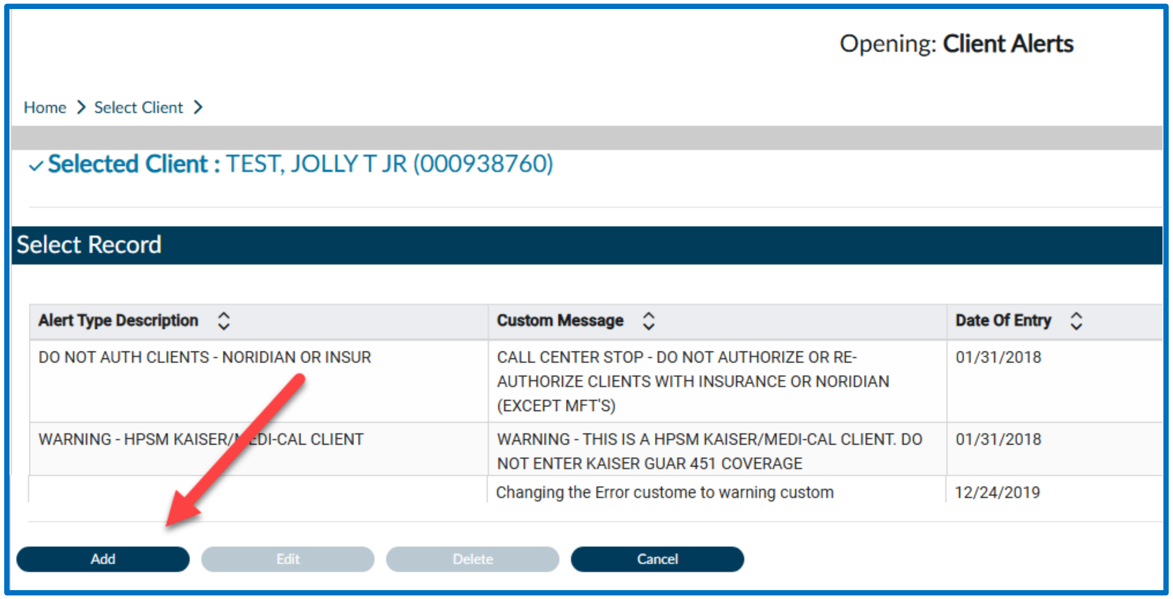
Section 4

Communication between Avatar Users

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

12. How Do I Create a Client Alert?

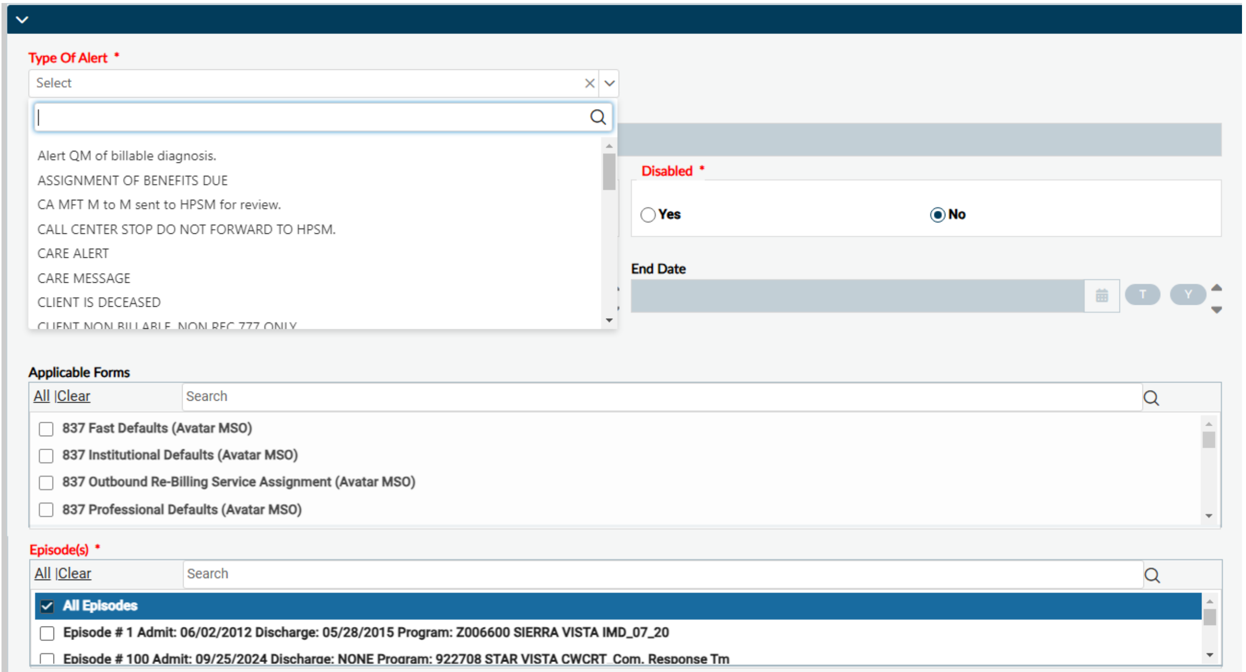
1) Open the client's chart in Avatar.
2) Search "Client Alerts" in the **Search** field.
3) If the client is associated with previous alerts, the **Pre-Display** will show all the client alerts that have been saved for the client. To create a new alert, click **Add**.



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**.



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

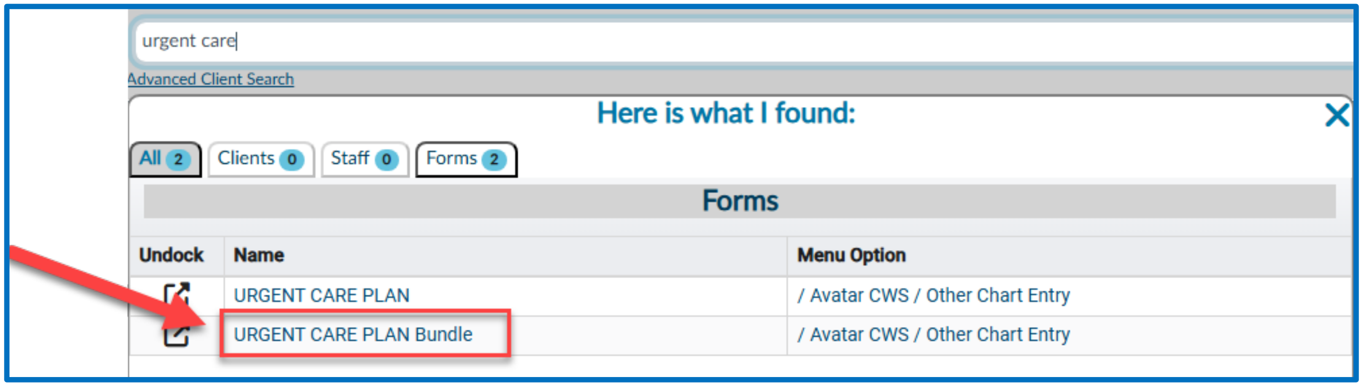
When you get to the pre-display, select the alert you would like to edit, and click the "Edit" button at the bottom of the screen. Select the appropriate existing alert and edit the custom message field needed.

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.

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

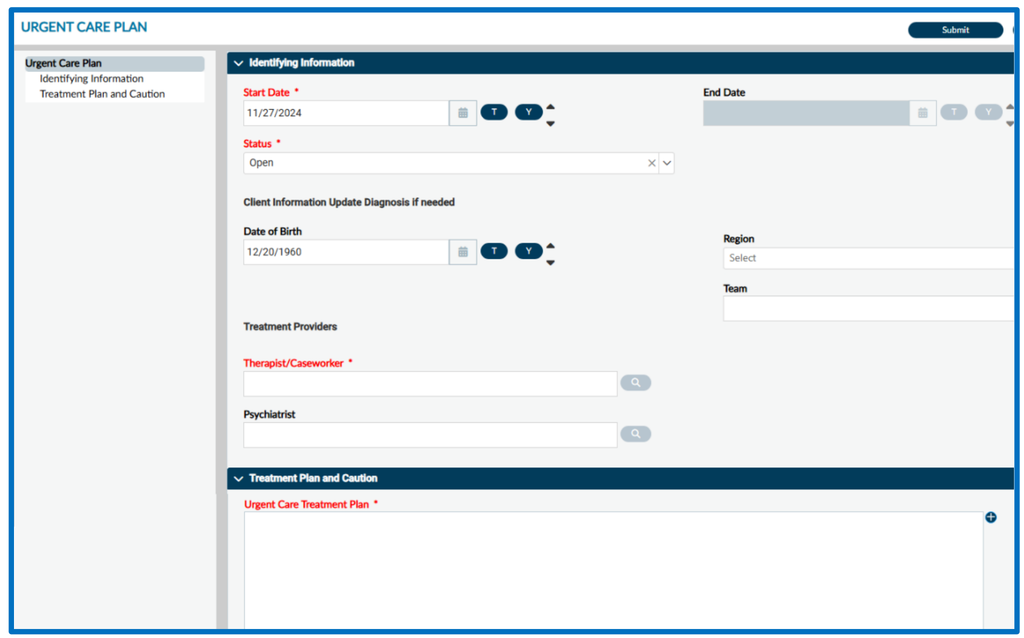
Open a client's chart in Avatar and search for the "Urgent Care Plan Bundle"



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

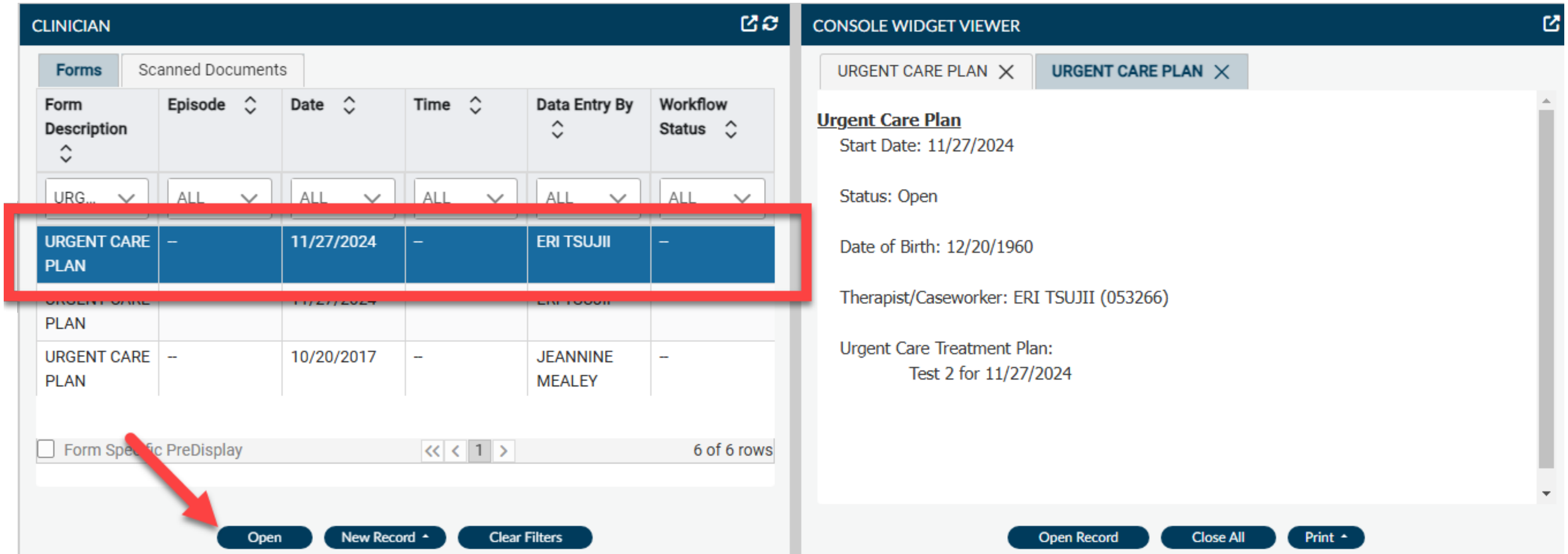
   To complete the Urgent Care Plan, fill in the required information. The "Urgent Care Treatment Plan" is where you should type the details of the Plan. For Urgent Plans that include medication information, type in the type of medication, dose, date, any issues, MD prescribing. When you've finished, click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



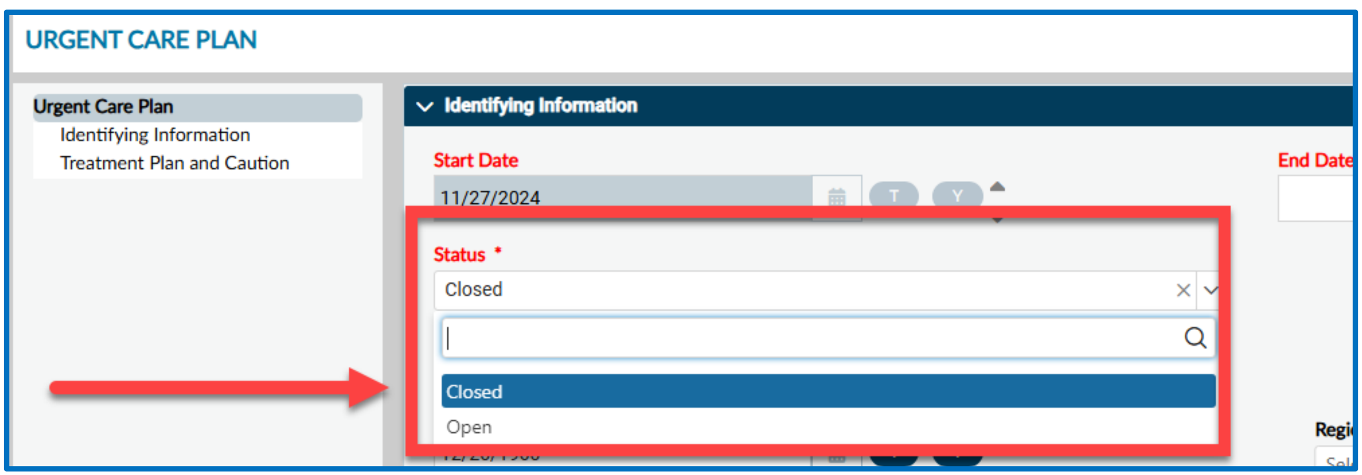
16. How Do I Deactivate an Urgent Care Plan?

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.

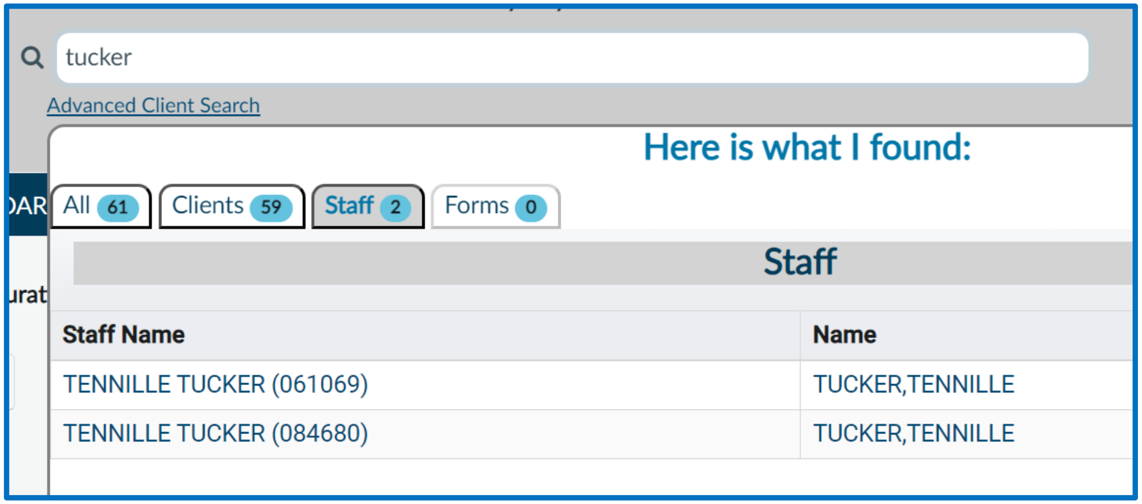


Change the Status on the Status drop down from "Open" to "Closed" then click "Submit.



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

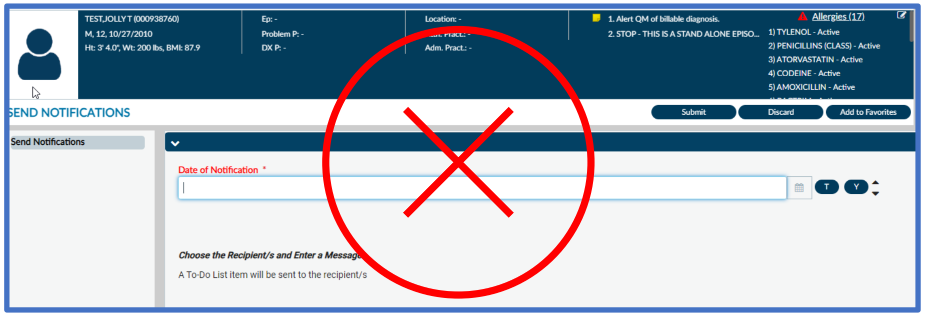
There are some staff who have multiple User IDs in Avatar, which results in their name coming up more than once when staff search for them. This can be for a variety of reasons (staff person works in both SUD and MD, staff was formerly a contracted provider and is now a BHRS employee, etc.)



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.

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.



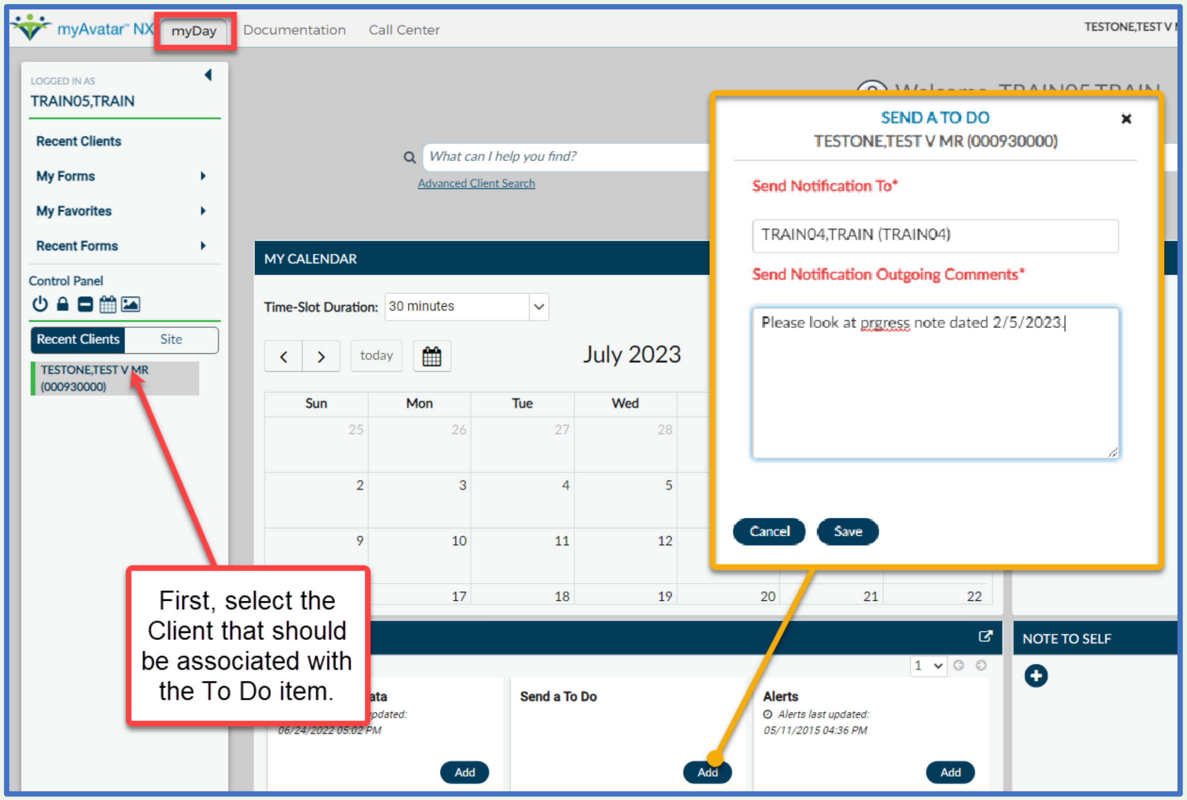
19. How do I send forms to review to my supervisor or other Avatar users now that the Send Notifications form has been retired?

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.

	“Send To Do” Quick Action	“Send To Do” button on Forms	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 “Co-Signature” section for more information on Document Routing.
	Does not link directly to a form.	Links directly to the form.	Links directly to the form.

“Send To Do” through 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.



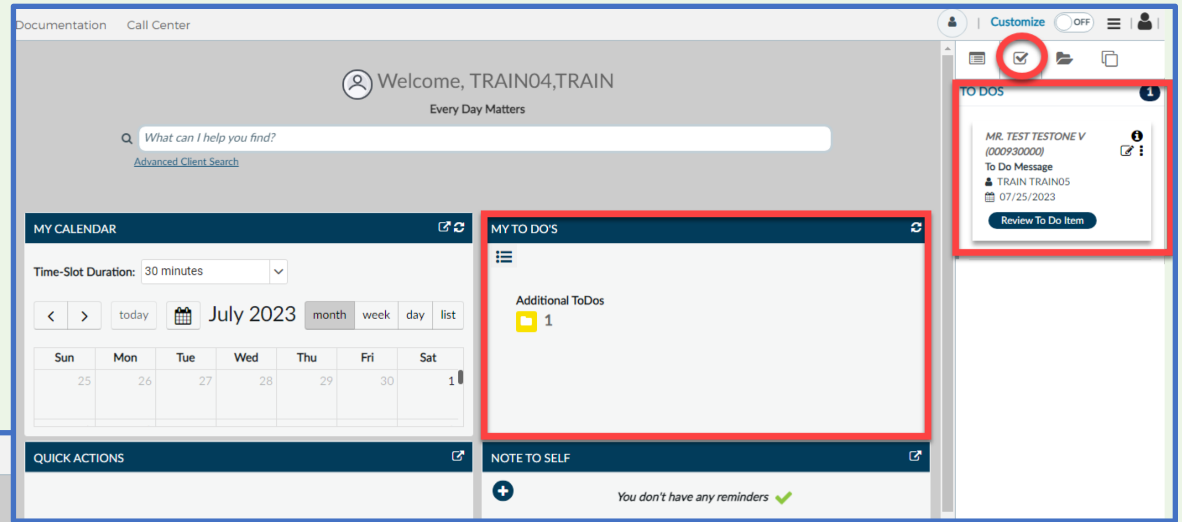
REMINDER

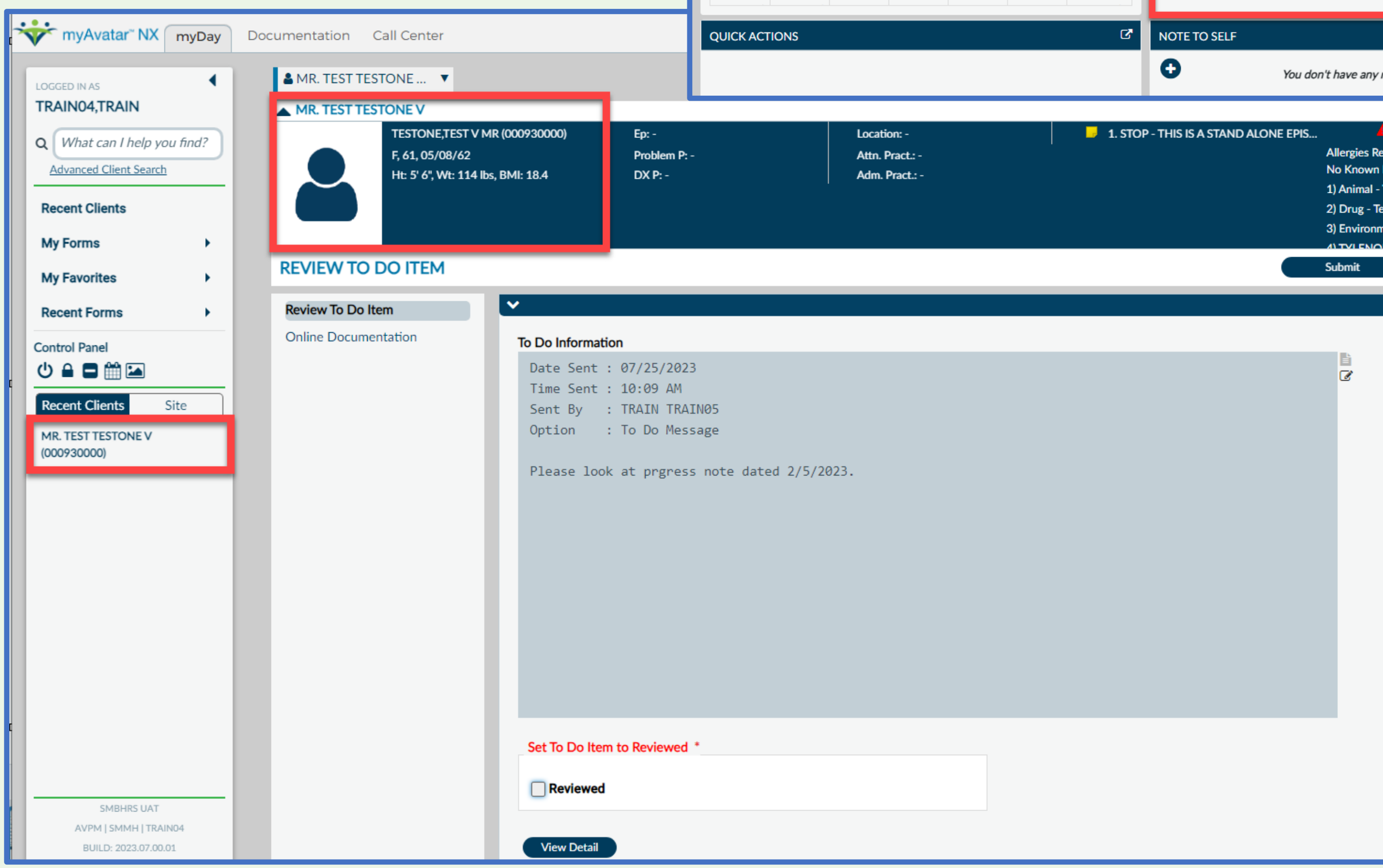
You cannot send a To Do without first selecting a client.

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 content of the note that was sent, and the client will also pop up on the left hand side of their screen.

However, because this type of To Do note is not directly linked to the form, the user will need to search the form to open it.





Therefore… **Staff should specify what form needs to be reviewed in the content of the note.**

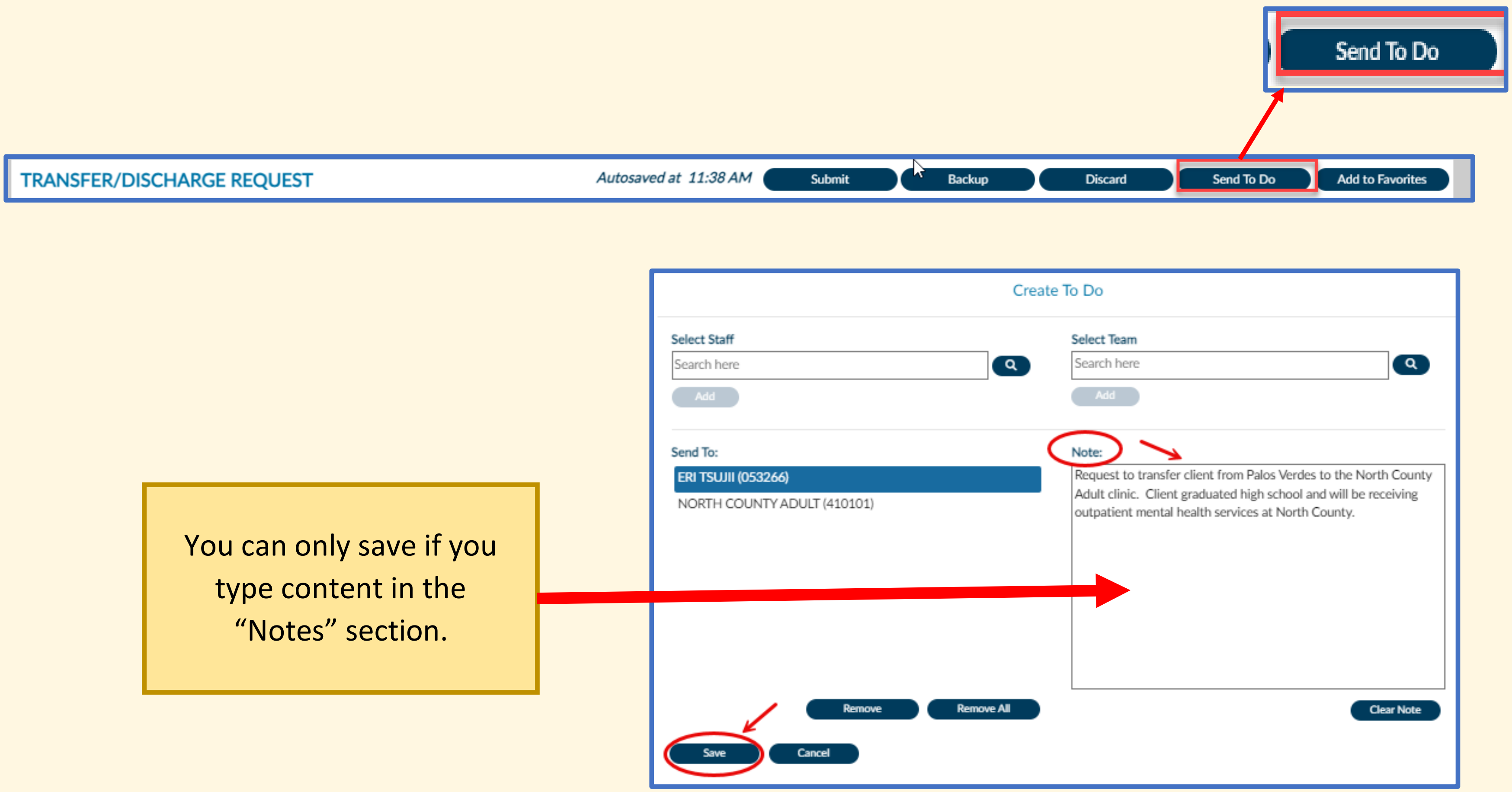
Sample Information to Include in To Do Note:

- Form Name
- Date of Form

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.



20. Supervisor Co-Signature Instructions (Document Routing)

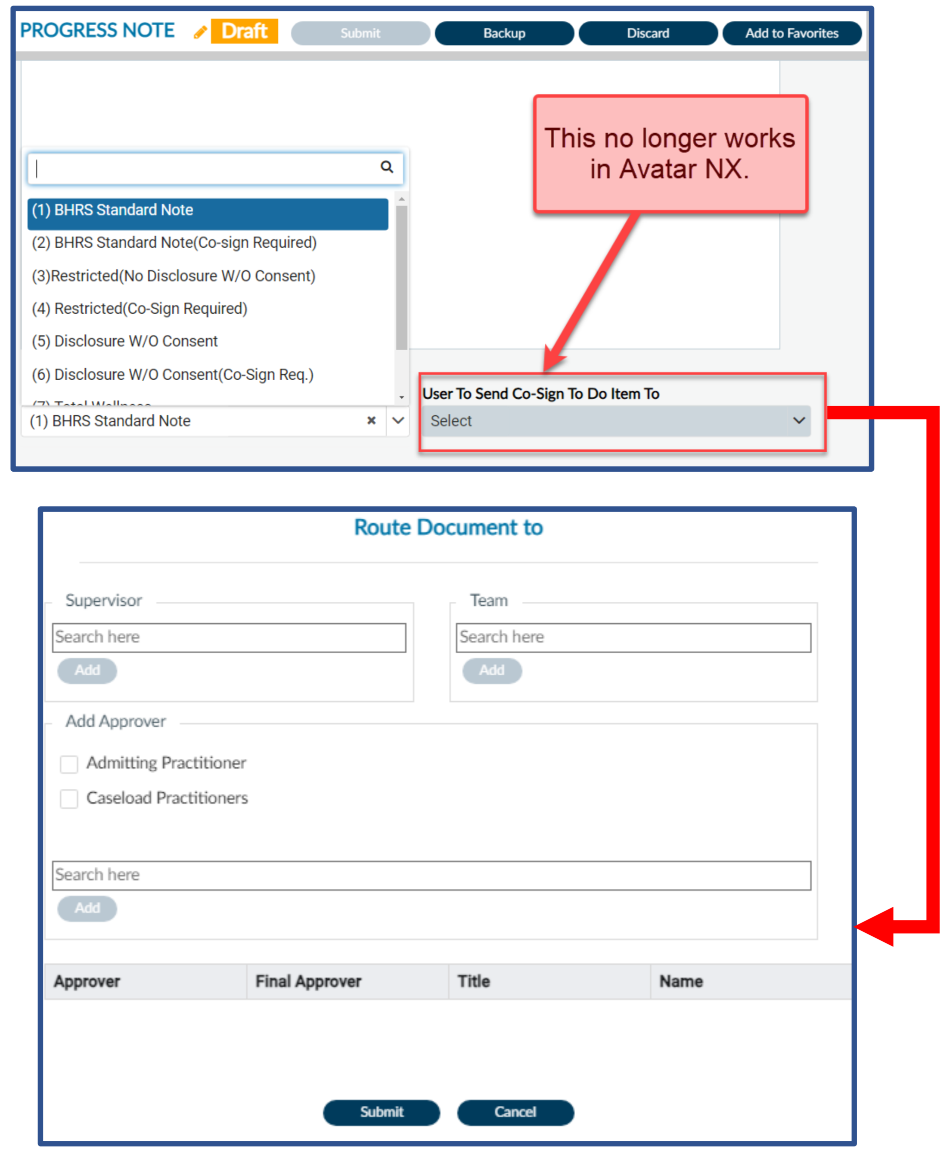
The previous mechanism by which co-signatures were obtained in the old Avatar does not function in Avatar NX. To avoid notes being stuck in limbo and to ensure that staff are able to get the required co-signatures, the Avatar NX mechanism for co-signature was turned on.

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.



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.

	For Staff Who Do NOT require co-signature	For Staff Who Require Co-Signature **(Option 1)**	For Staff Who Require Co-Signature **(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).	1) 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. 2) 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:

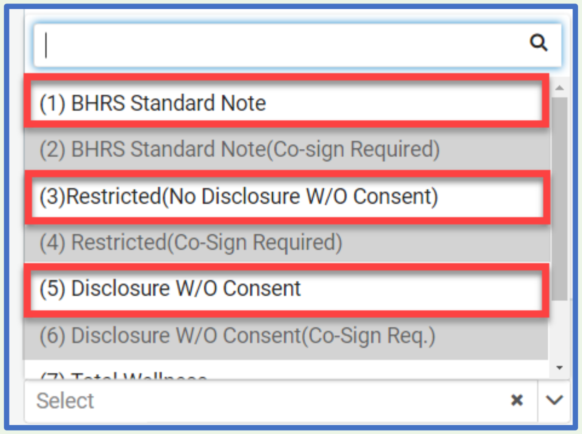
The Routing pop up box will still show up when you file the note, but the "approver" fields are not required*. Staff will just need to hit submit without filling anything out.

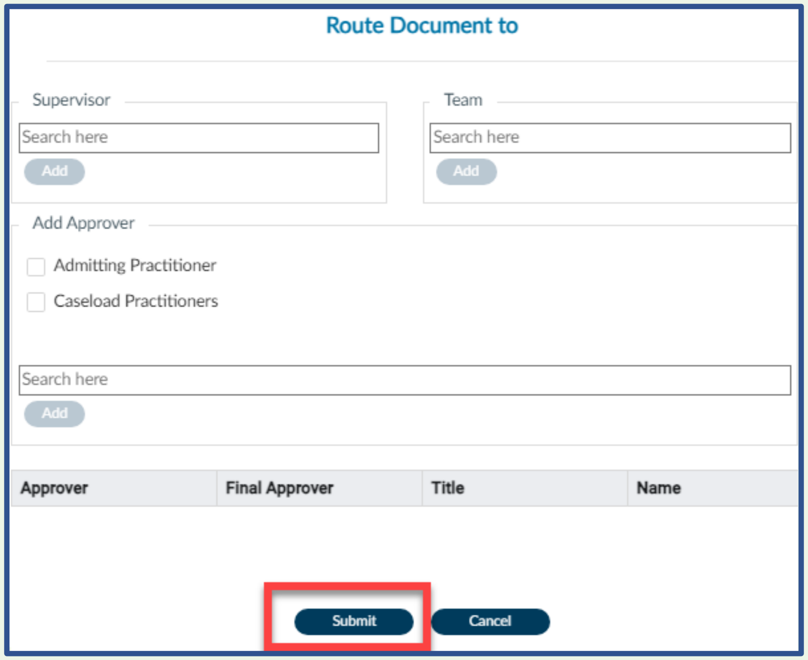
*Required fields will be in red font.

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

Info specific to progress notes:

For staff who do not require a co-signature, be sure to select a note type that does not require a co-signature.





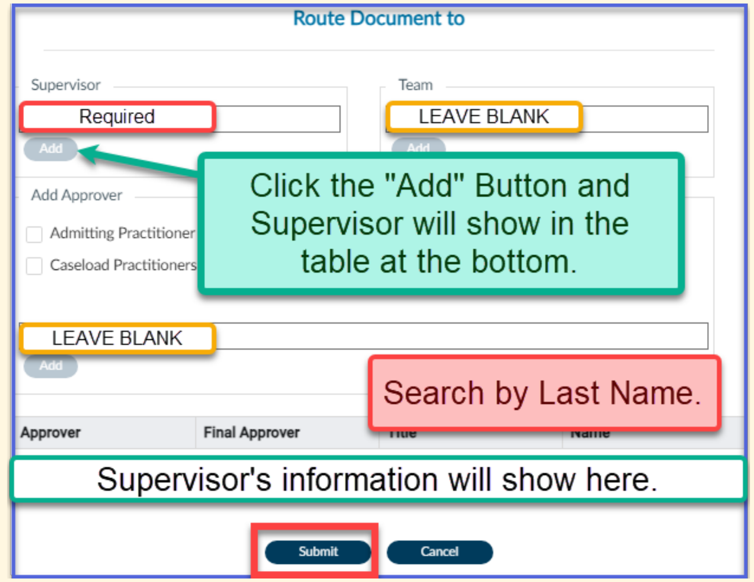
IT has checked with the Avatar vendor to see if this pop up can be removed. However, we were informed that this is not something that can currently be removed.

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.

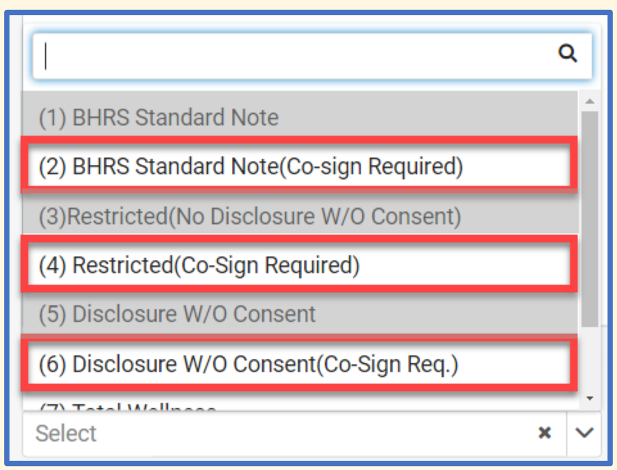


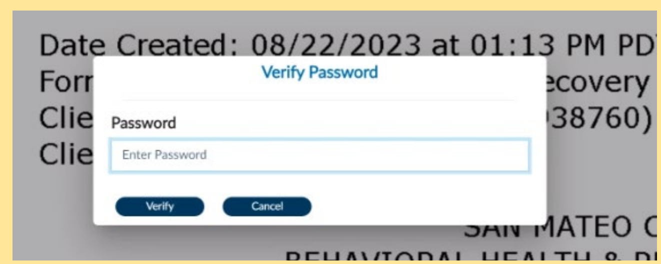
When a staff person does require co-signer then the approver field will be marked as required (shown in red font).

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.

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.



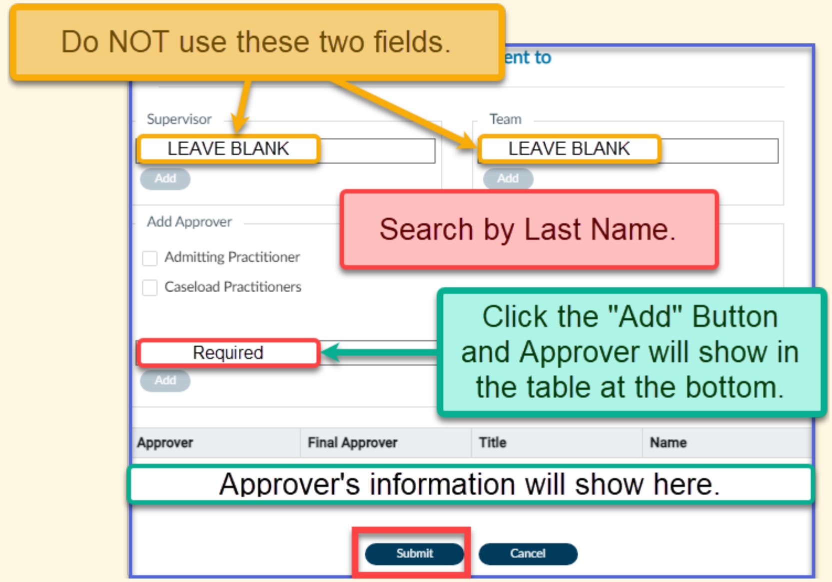


Note for Approvers: Another change from the old Avatar is that with Avatar NX the approver needs to enter their Avatar password to complete the approval process. Currently, this is not a feature that QM or IT are able to disable, but IT is working with the Avatar vendor to find a solution. For more information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

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

Follow the instructions on this page if…

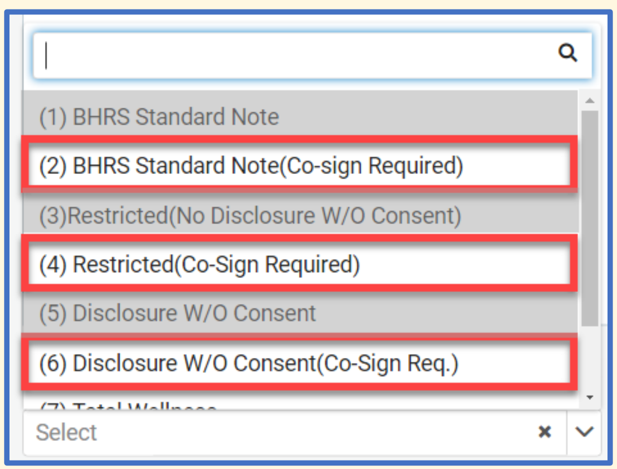
1) If nothing is marked as required, but supervisor is requiring co-signature (e.g., if supervisor wants to review new staff's notes for a period of time), OR
2) The "**Add Approver**" text in the center of the window is in red font.

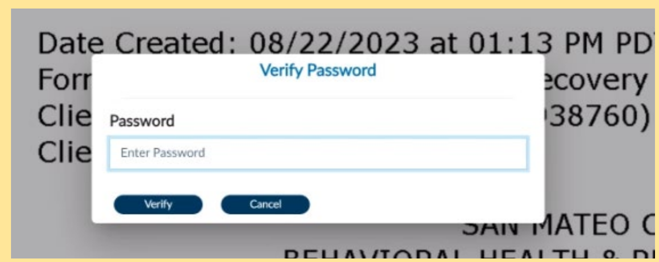


Alternatively, on some forms there is a "Pending Approval" option that is active for some users. By selecting "Pending Approval" you will trigger the Document Routing window to pop up, and you will enter your supervisor name in the "Add Approver" field and click "add" to send to your supervisor.

Info specific to progress notes:

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

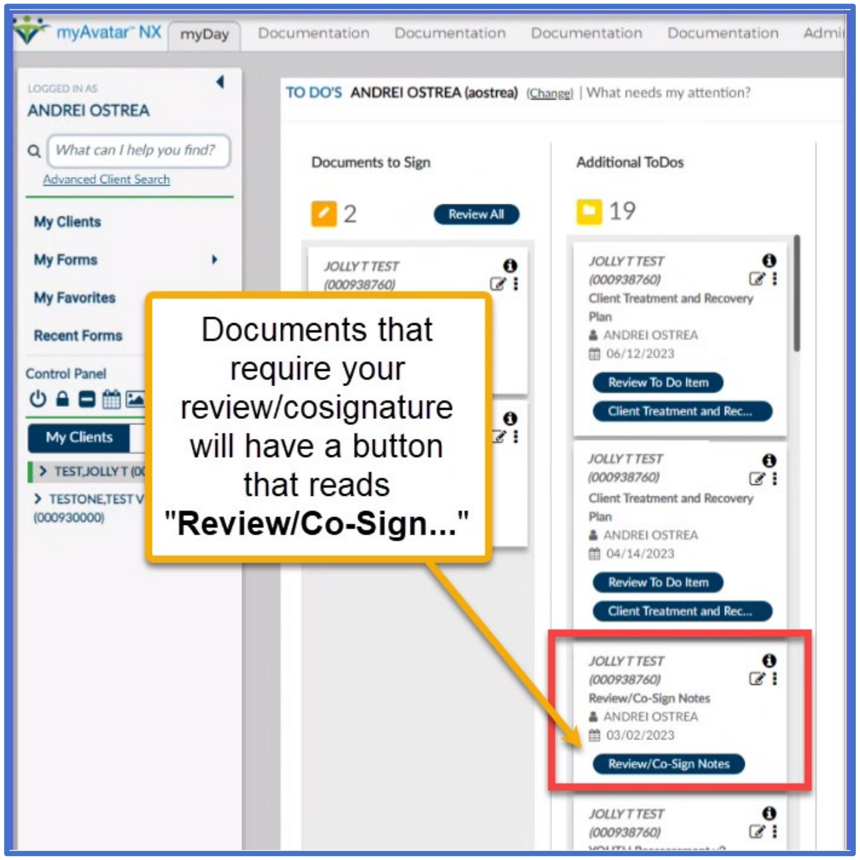




Note for Approvers: Another change from the old Avatar is that with Avatar NX the approver needs to enter their Avatar password to complete the approval process. Currently, this is not a feature that QM or IT are able to disable, but IT is working with the Avatar vendor to find a solution. For more information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

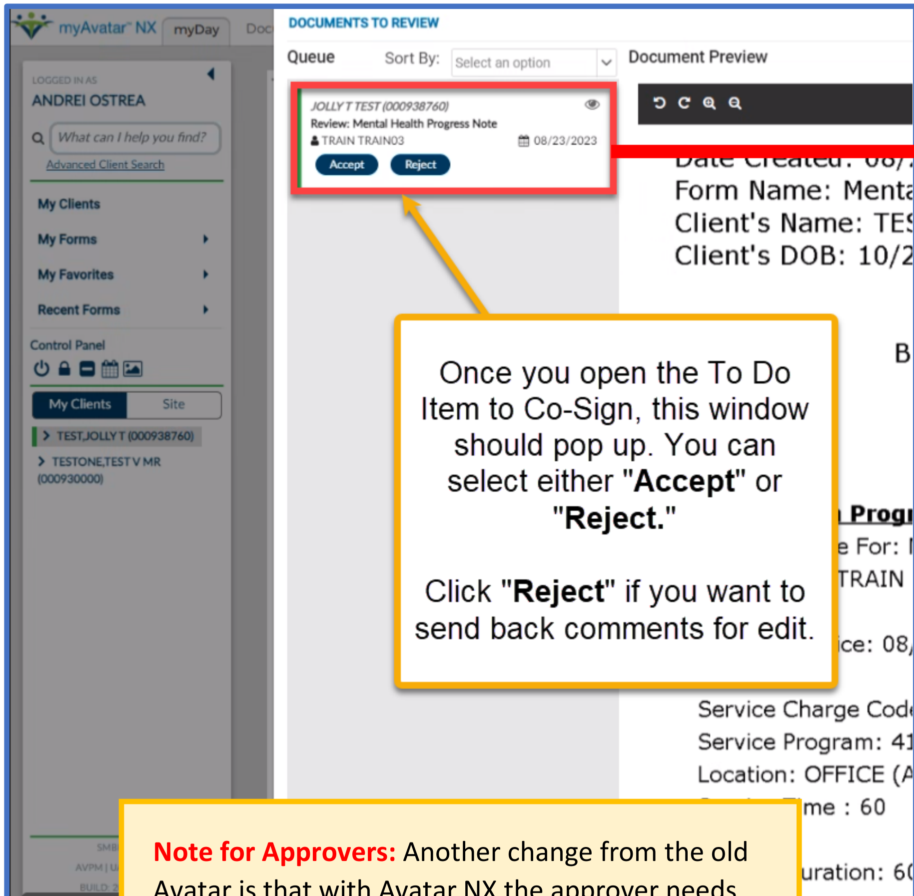
If the supervisor does not see the To Do Item, this could be for several reasons:

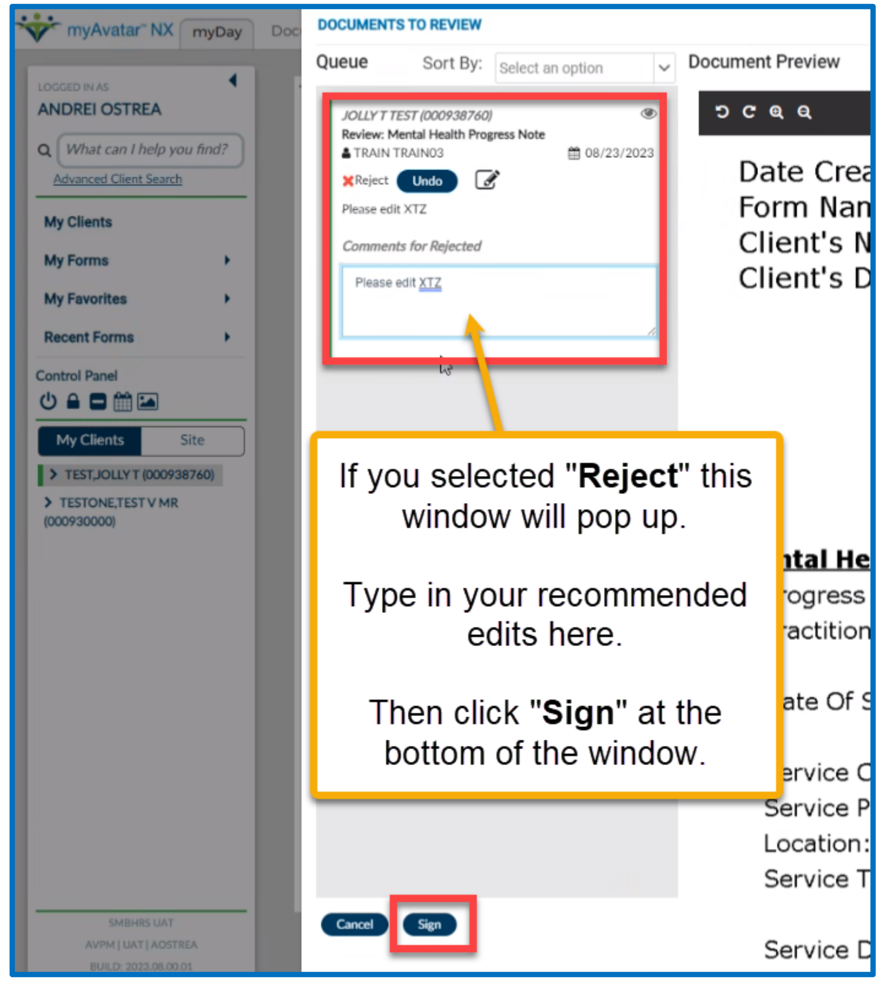
1) The supervisor has multiple user accounts associated with their name and the inactive/incorrect account was selected. Double check with the supervisor which account should be selected when sending To Dos.

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.

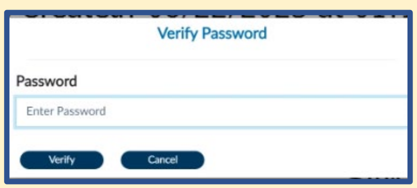
   Accounts may be deactivated for a variety of reasons including, but not limited to: too many failed attempts to log in, not having used Avatar for an extended period of time (e.g., staff was on leave), etc.

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



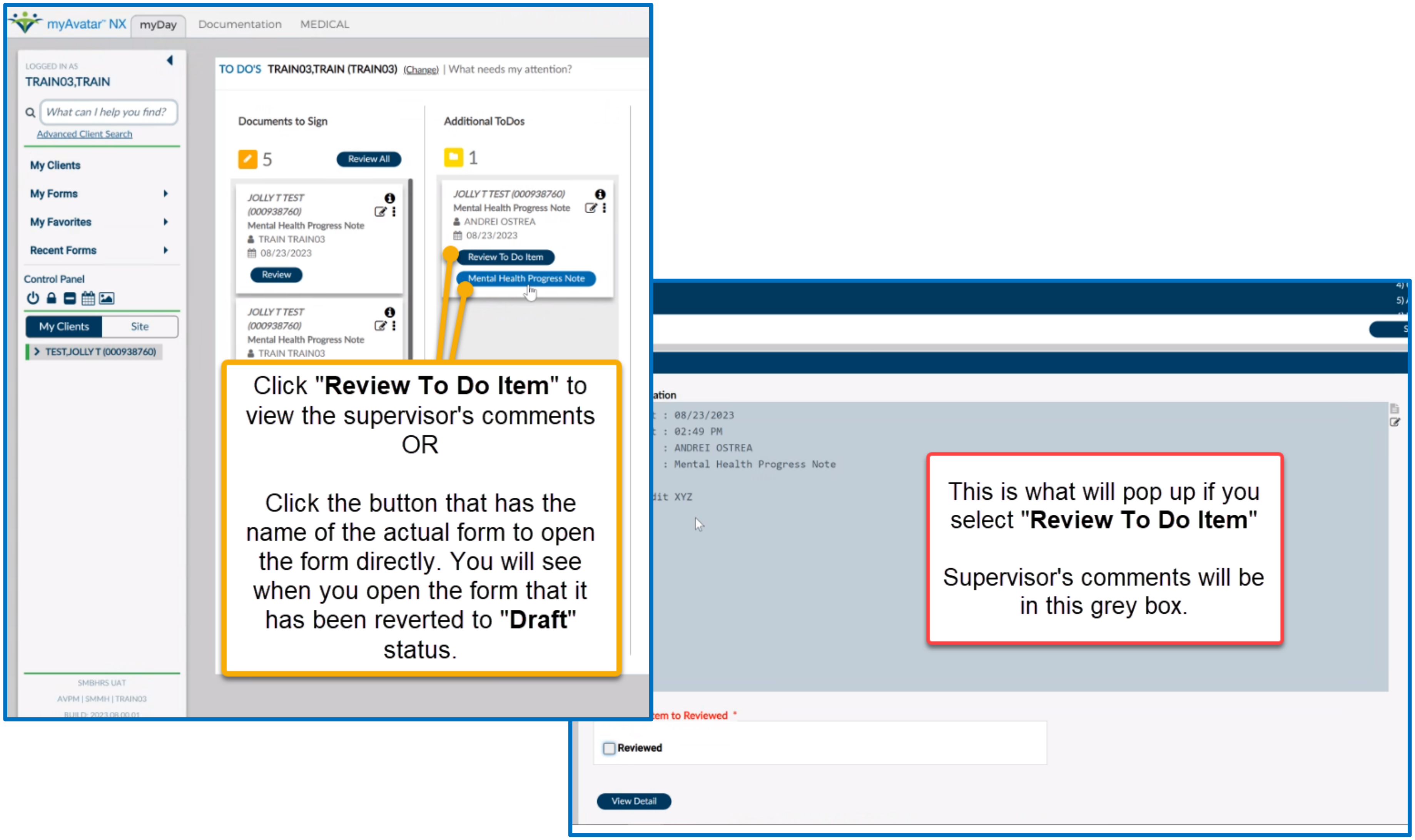


Note for Approvers: Another change from the old Avatar is that with Avatar NX the approver needs to enter their Avatar password to complete the approval process. Currently, this is not a feature that QM or IT are able to disable, but IT is working with the Avatar vendor to find a solution.



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 "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.



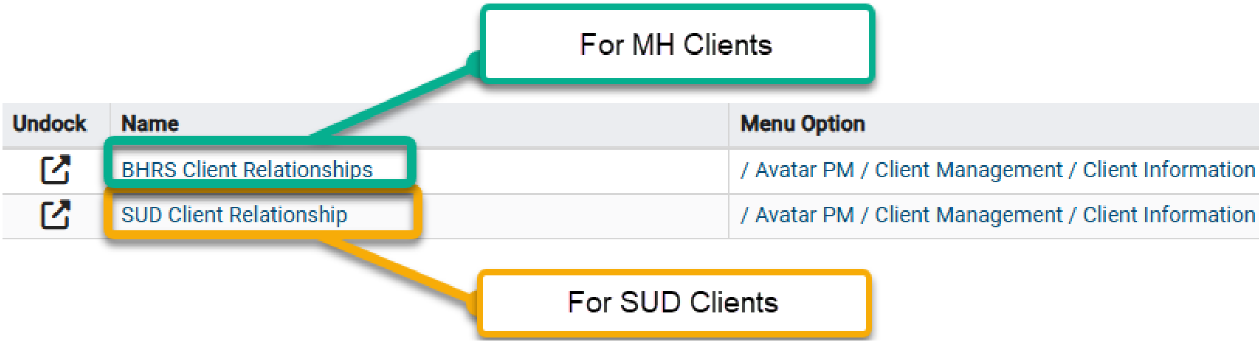
Section 5

Common Client Forms

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.



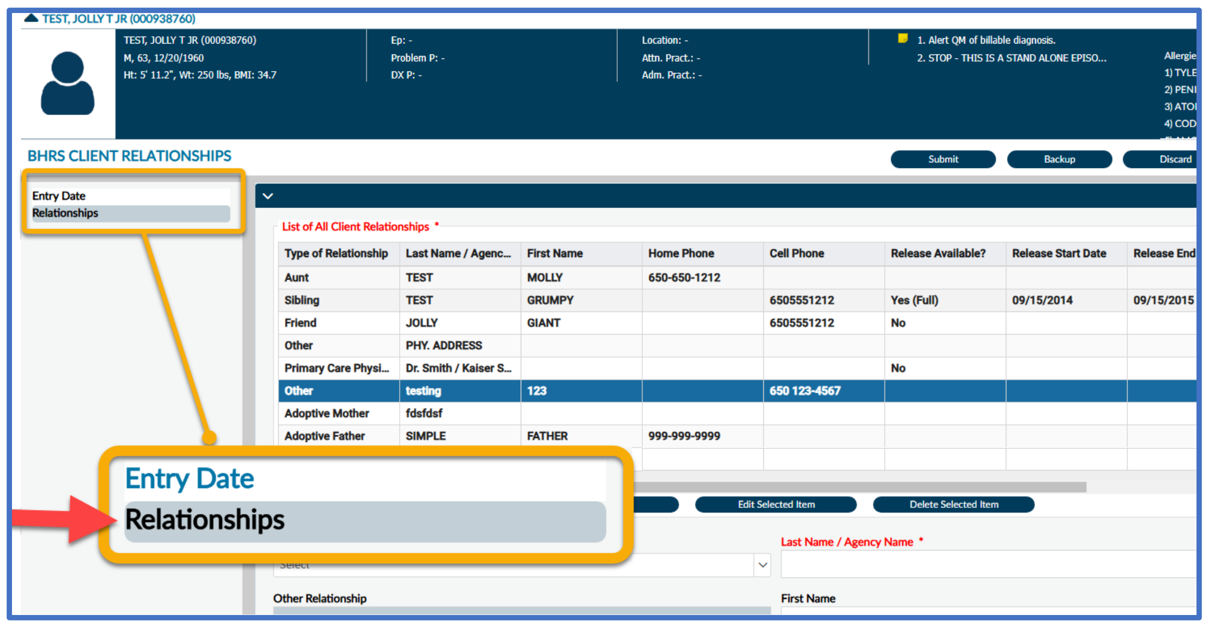
24. BHRS Client Relationships for Mental Health Clients

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.

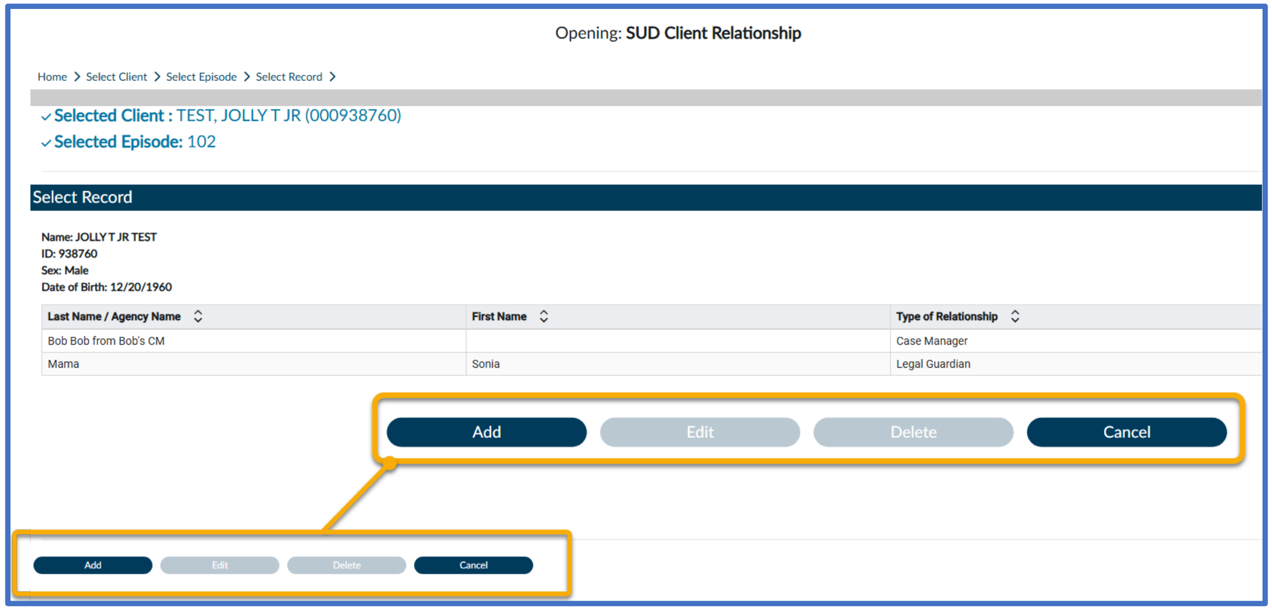
To view, add, edit, or delete contacts, click on the “Relationships” tab. Click Submit when you are done with the form.



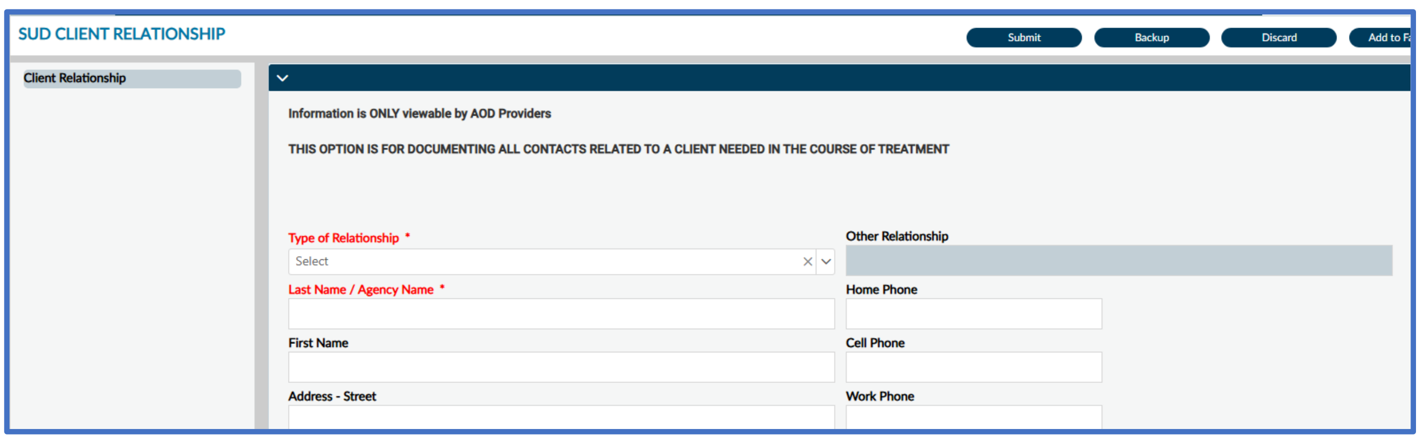
25. SUD Client Relationship for SUD Clients

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.



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.



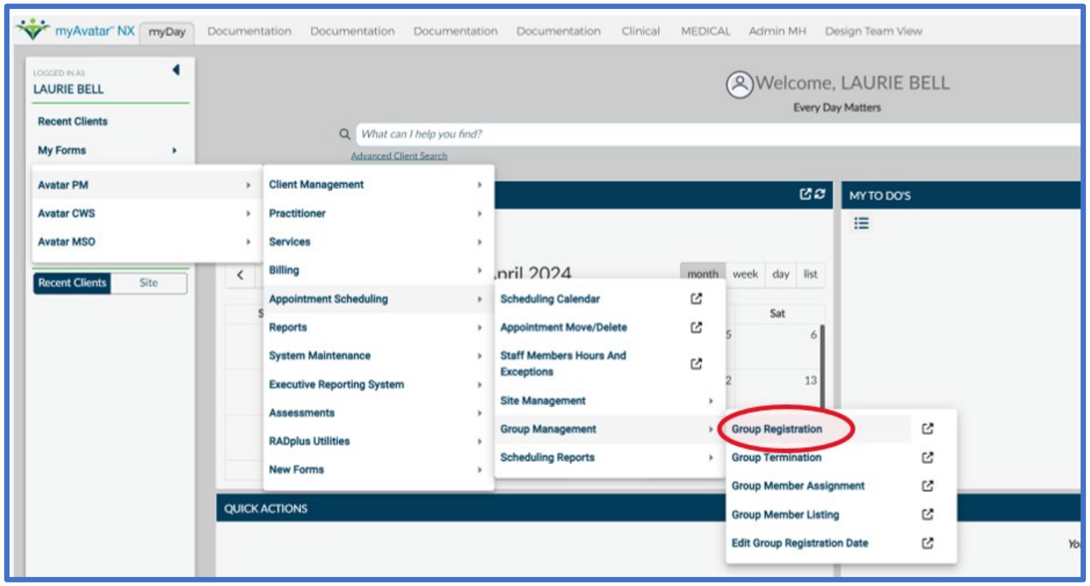
26. Creating a New Client Group in Avatar

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.

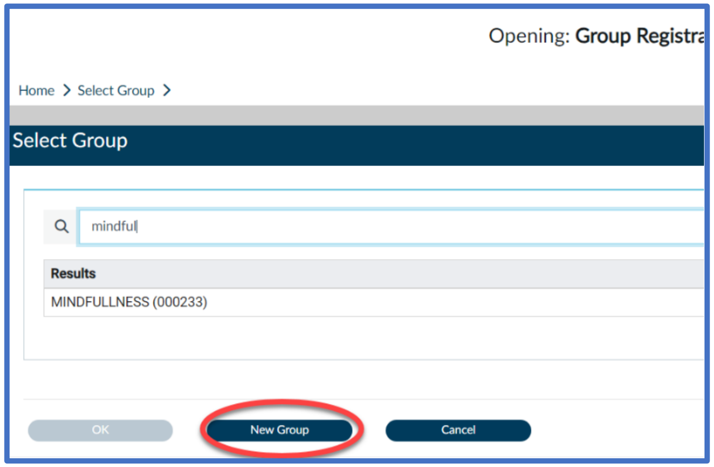
Please note that groups with similar names may appear in the Select Group list at the bottom of the page.* ***Make sure that your new group name does not already exist before you register the new group.*

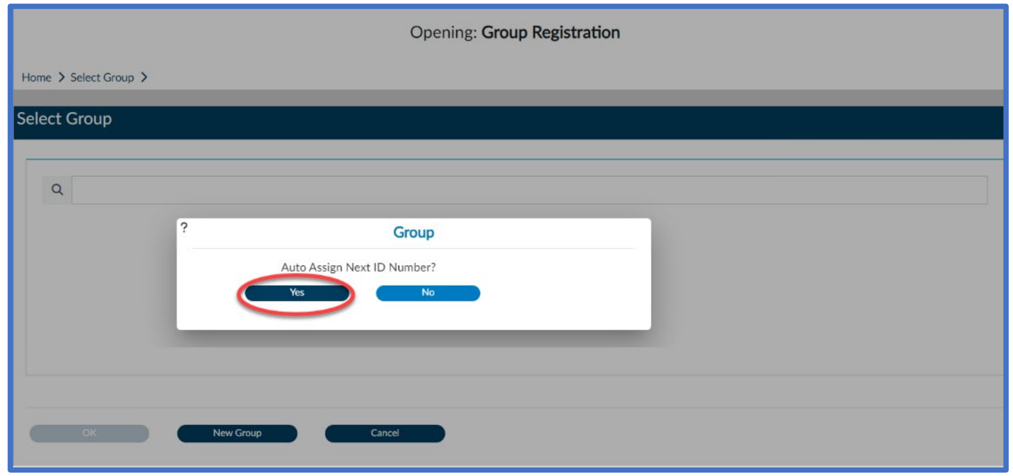
To Create a New Group

1) Enable the New Group button by typing any letter into the search bar (the button will be grayed out before this step).

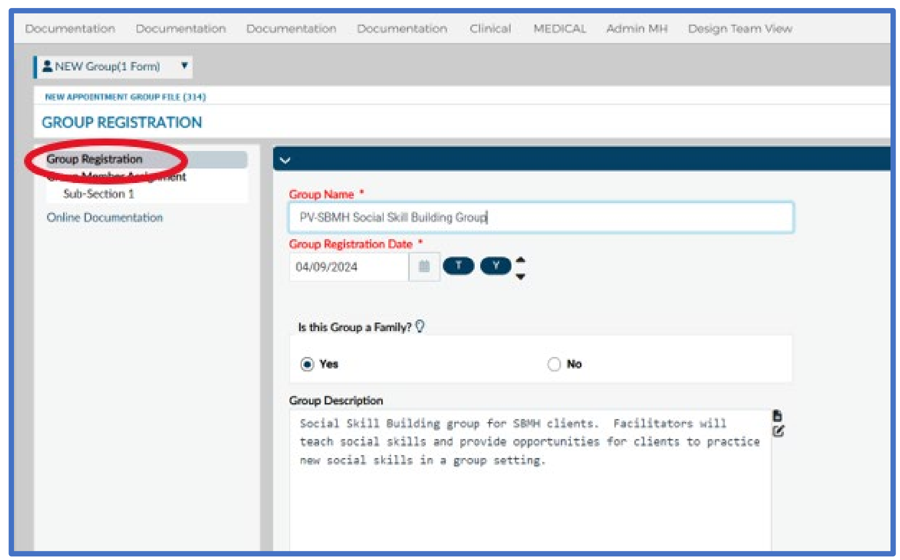
2) Select the New Group button.

3) Click “Yes” to Auto Assign Next ID Number for the group.





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.

Return to Table of Contents

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.)

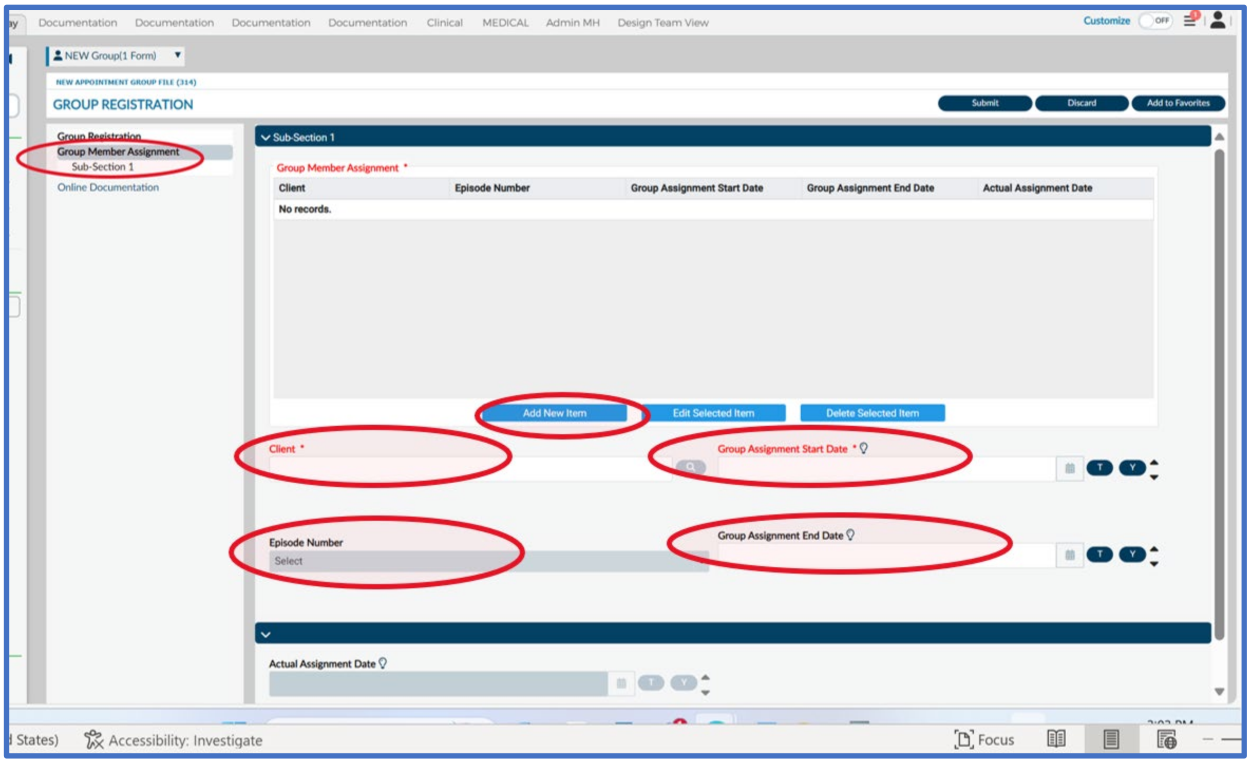
Group Capacity: The maximum number of members in the group (e.g., If "12" is entered, this means that the group will have a maximum of 12 members). This field can be left blank if there is no maximum number of participants that you want to specify.

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 left-hand 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.

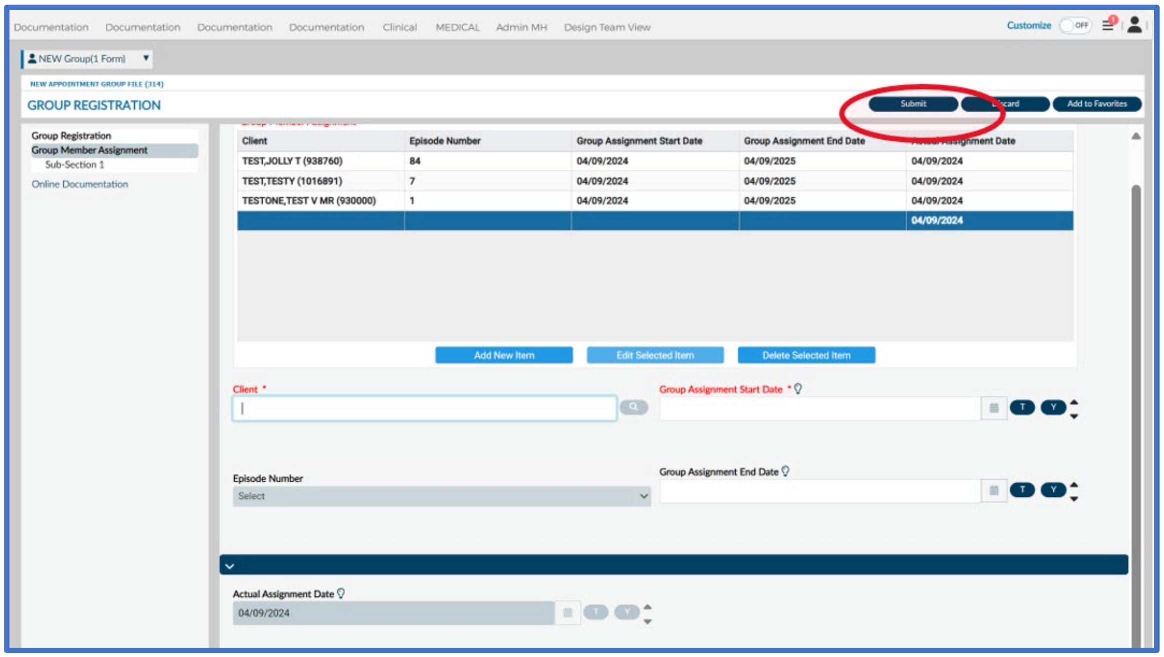
Group Assignment Start Date: Add the start date for the group.

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)



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."

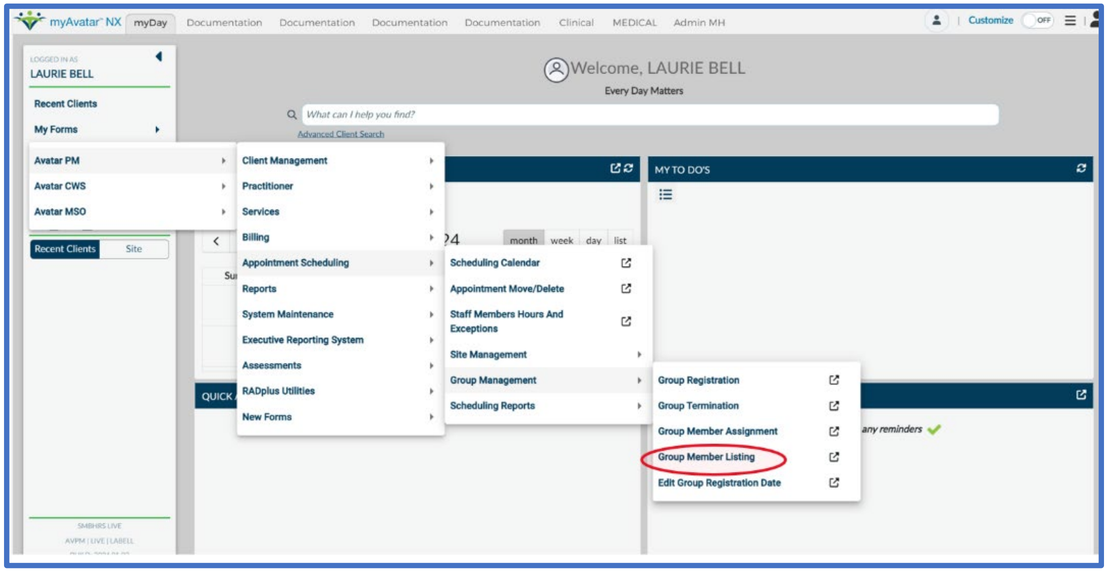
Click "Submit" after making any changes.

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

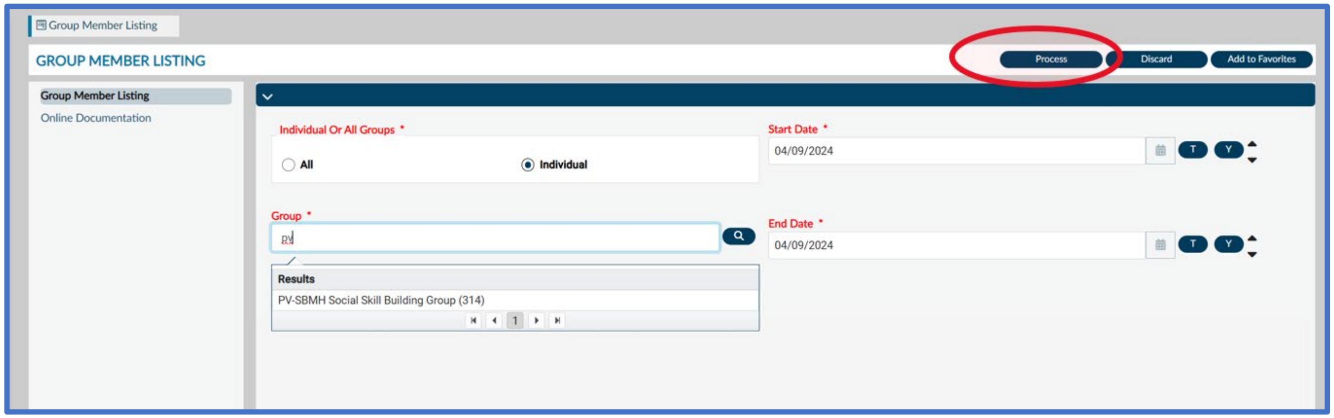
Group Member Listing Form

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 particualr session.

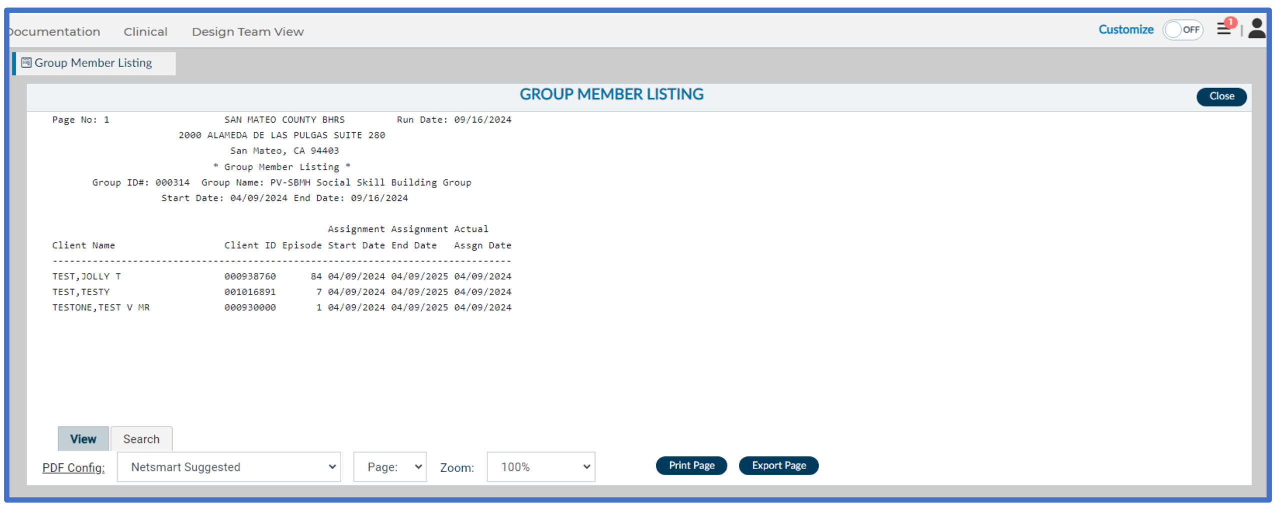
Menu Path: (Avatar PM/Appointment Scheduling/Group Management/Group Member Listing (Alternatively you can use the search bar to locate the report).



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



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



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 Consent Forms

Clinical Medication Consent

Clinical Consent Retraction

<u>To view already completed consent tracking widgets in Avatar</u>, 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.

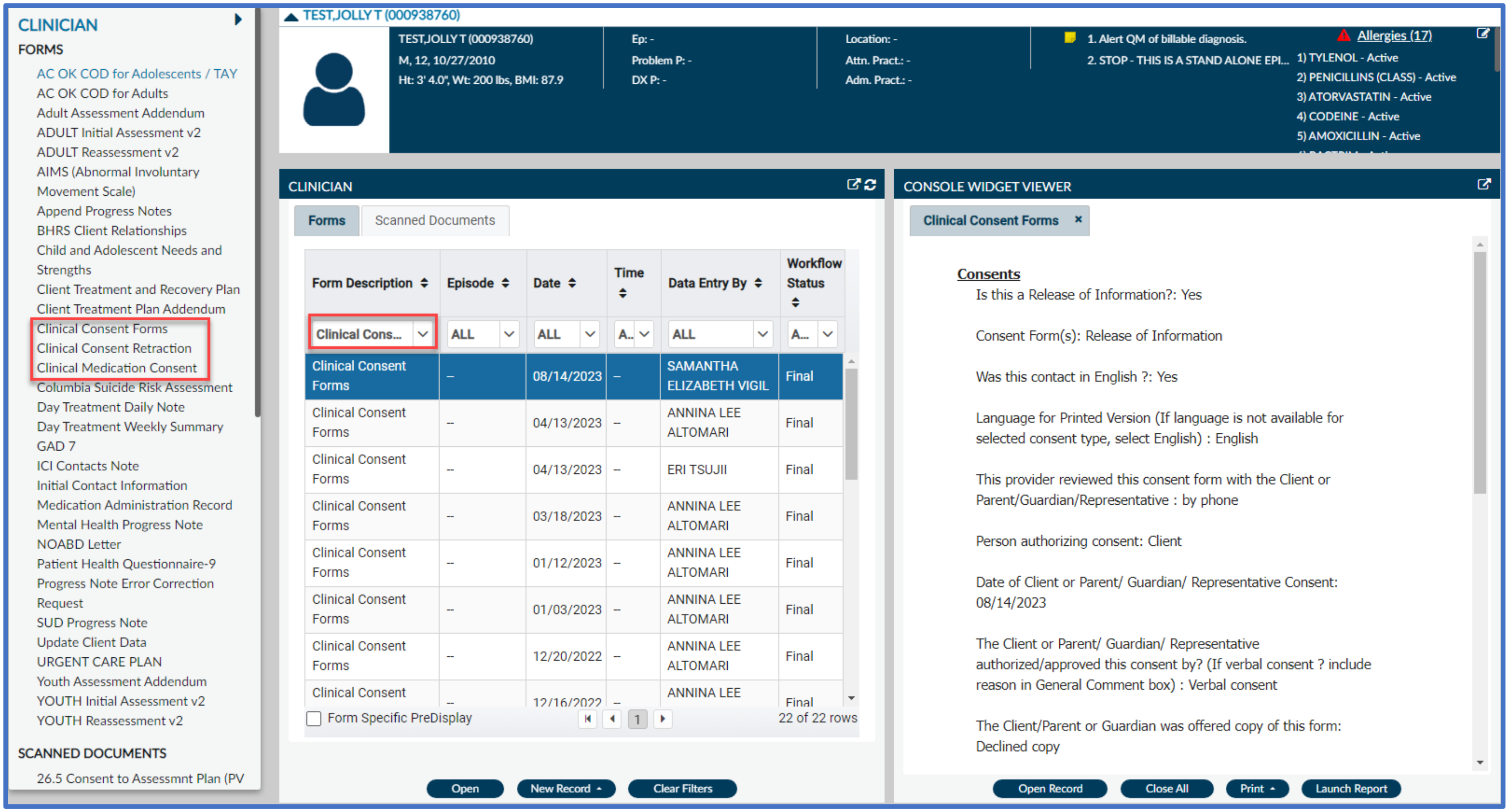
ADMIN PAPER CONSENT TRACKING

Patient Name	Consent_Type	Retracted Date	Release for Name/Agency	Release for	Initial Date of Consent	Restricted Status	Consent Exp Date
TEST,JOLLY T	Consent to Release Information		Edgewood	AOD programs	04/22/2021		04/21/2024
TEST,JOLLY T	Treatment Consent				08/23/2018		
TEST,JOLLY T	Medication Consent				08/24/2018		
TEST,JOLLY T	Cell Phone Agreement				02/09/2022		02/01/2033
TEST,JOLLY T	Consent to Electronic Communications				03/18/2023	Yes	
TEST,JOLLY T	Medication Consent				07/25/2019		

CLINICAL CONSENT FORMS TRACKING

Patient Name	Consent_Type	Retracted Date	Release for Name/Agency	Release for	Initial Date of Consent	Restricted Status	Consent Exp Date
RUSSELL,CHARLENE 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	Consent to Treatment				12/20/2022		
TEST,JOLLY T	Cell Phone Agreement				12/16/2022		

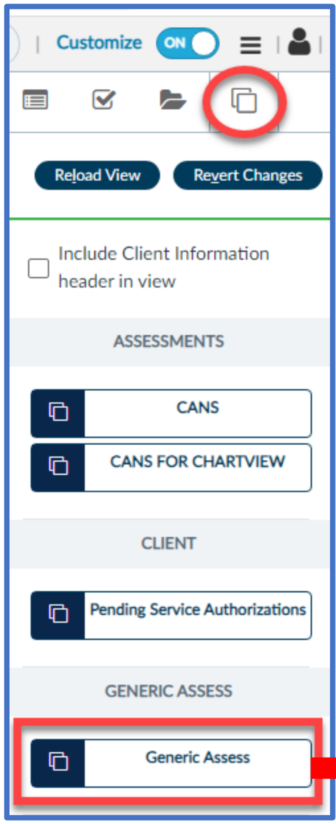
Alternatively, you can use the Forms widget and Console Widget Viewer which are both located in the Documentation view tab to scroll through individual Clinical Consent Forms. You can filter by clicking on the desired document on the forms menu or using the drop down menu in the "Form Description" column.

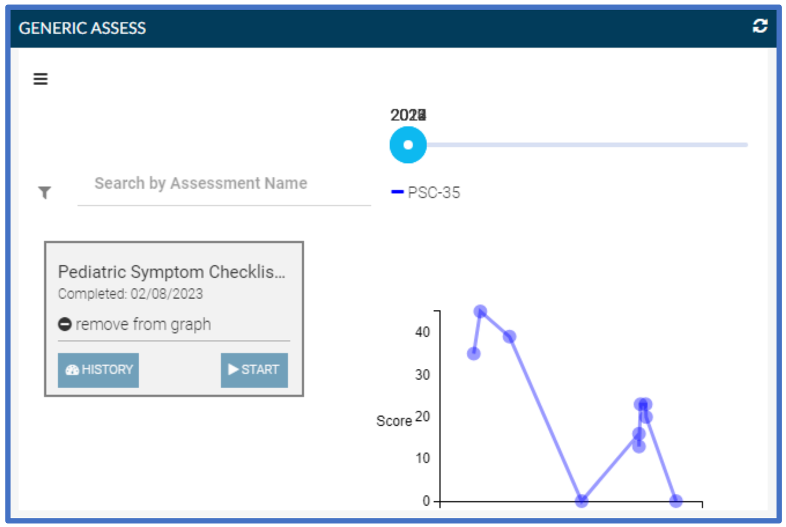


30. How do I find the PSC-35?

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.





Drag and drop into your main widgets view tab screen (Clinical/Medical) and you should now be able to see the PSC-35 through this “Generic Access” widget!

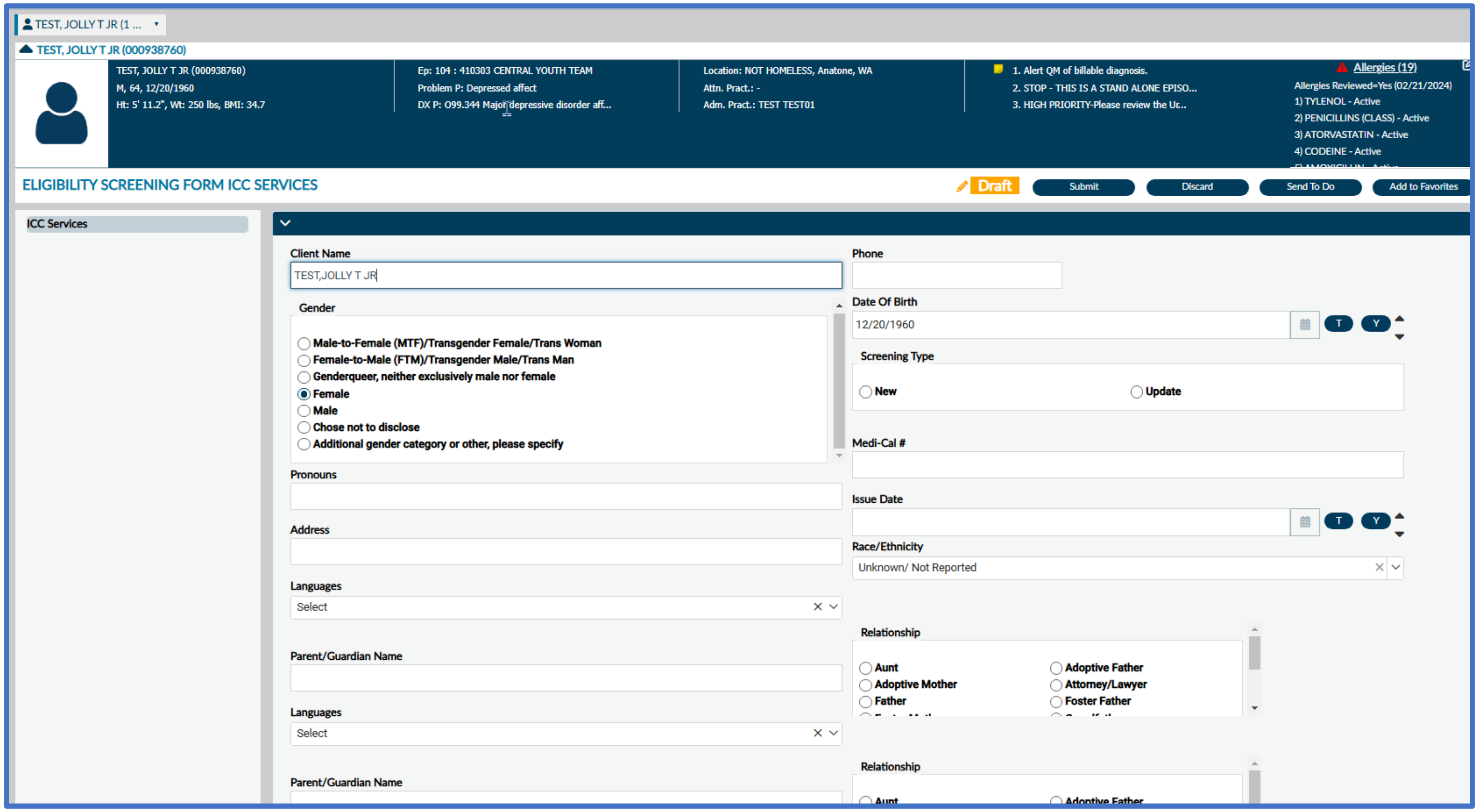
If you do not know how to add a widget, please see [the Customizing Your Views](#) section of this document.

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:

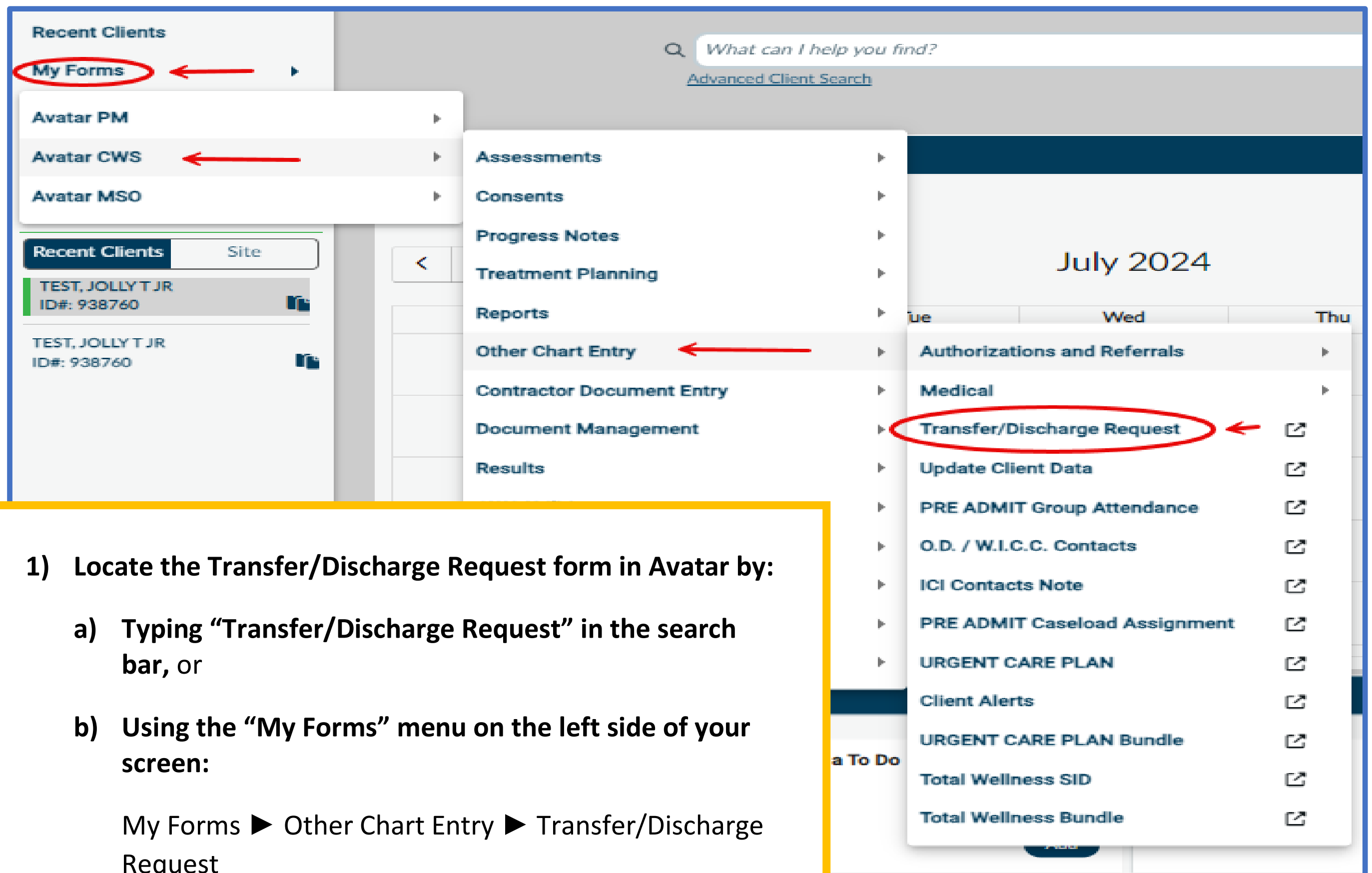
- ICC IHBS TFC Training for Clinicians
- Instructions: SMC ICC Eligibility Screening Form on AVATAR
- Recorded Instructions: SMC ICC Eligibility Screening Form on AVATAR



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:

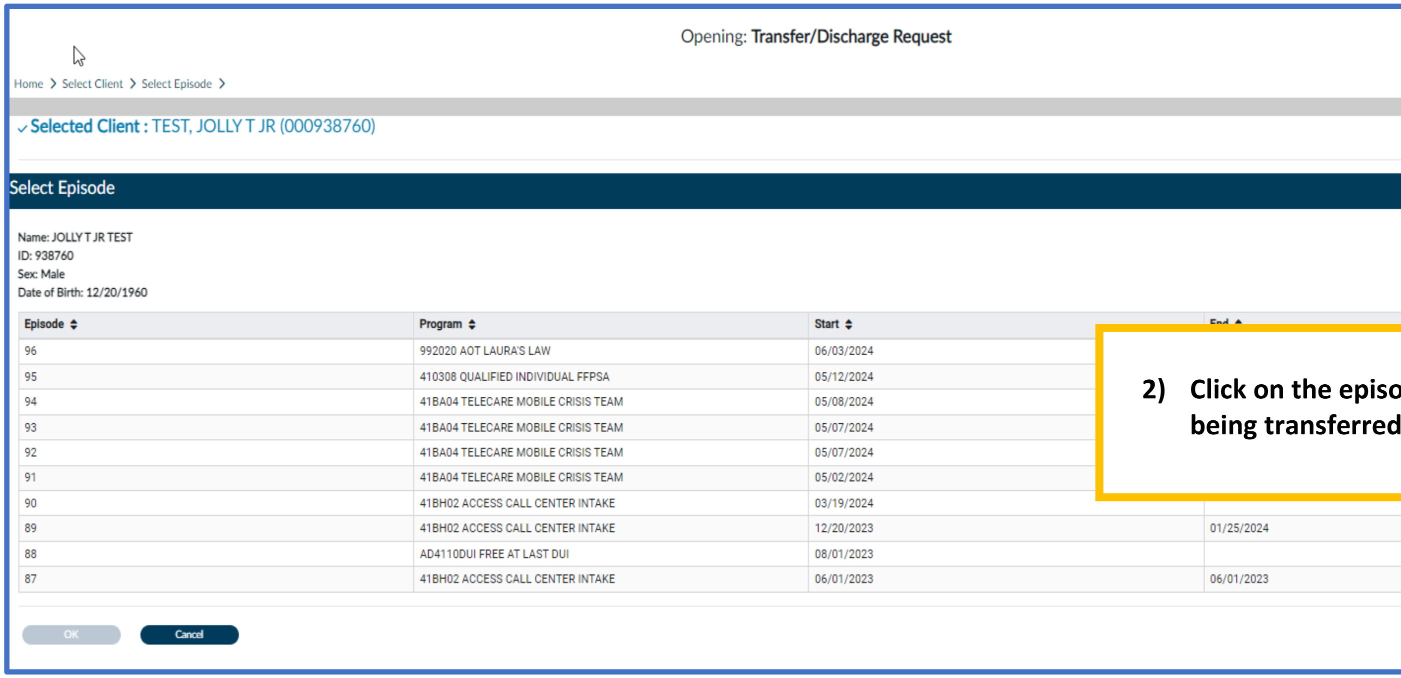


1) **Locate the Transfer/Discharge Request form in Avatar by:**

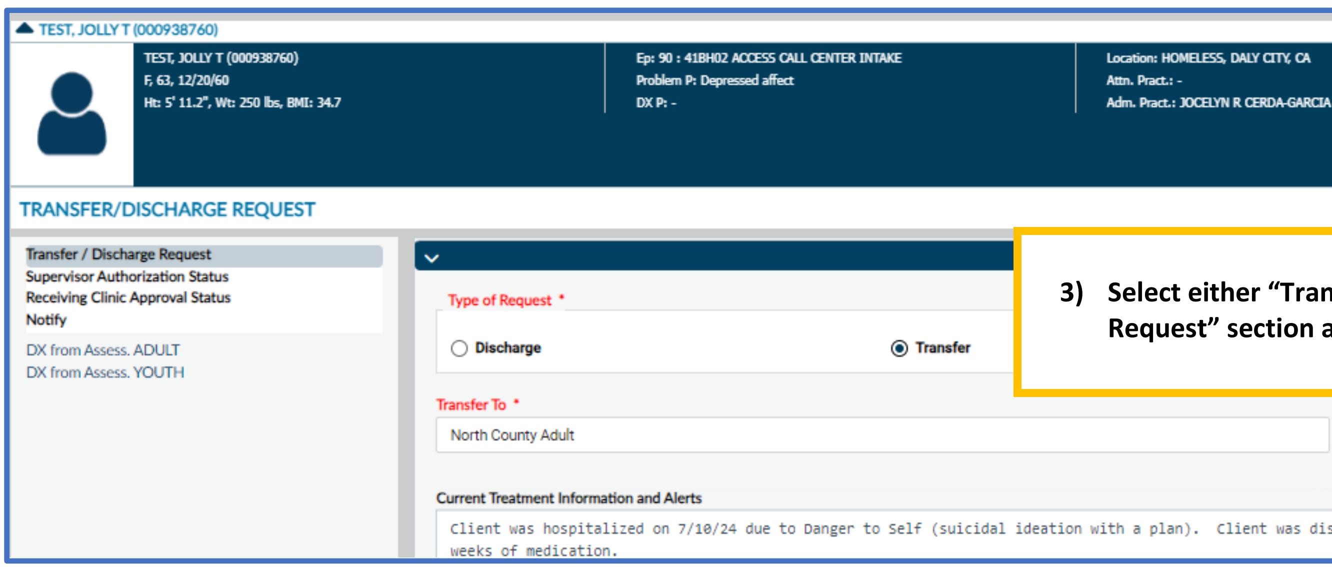
   a) **Typing “Transfer/Discharge Request” in the search bar,** or

   b) **Using the “My Forms” menu on the left side of your screen:**

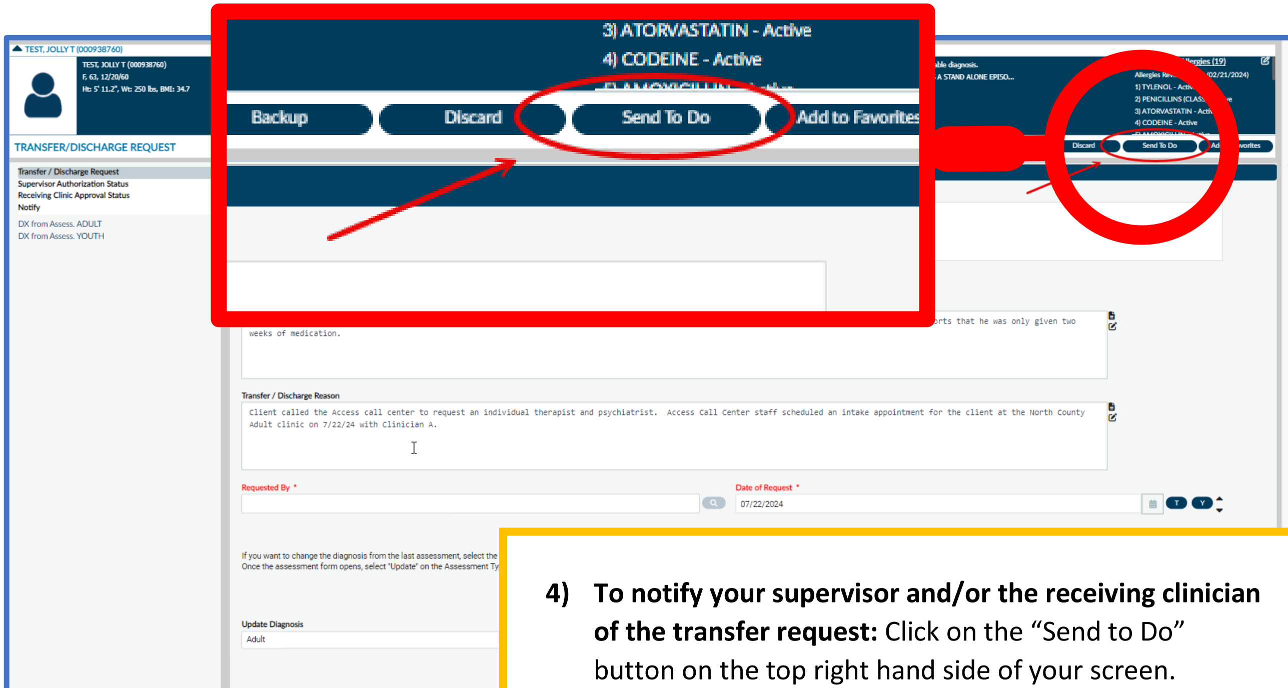
   My Forms ▶ Other Chart Entry ▶ Transfer/Discharge Request



2) Click on the episode from which the client is being transferred/discharged. Then click "Ok."



3) Select either "Transfer" or Discharge from the "Type of Request" section and complete all other required fields.

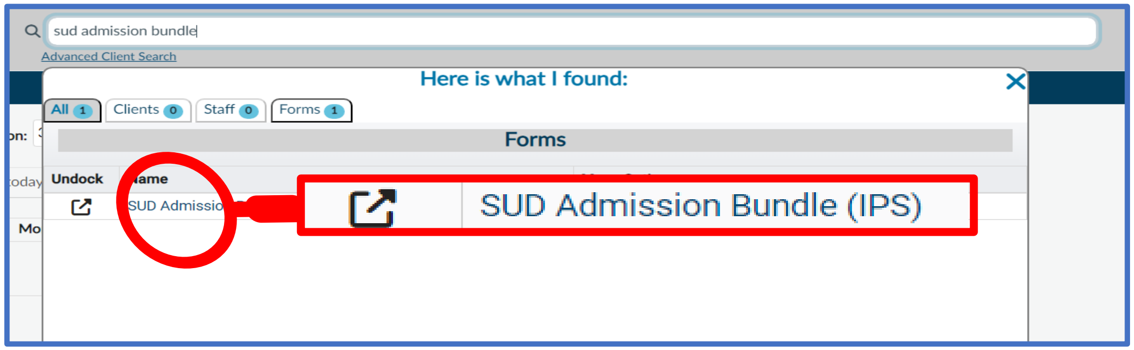


4) **To notify your supervisor and/or the receiving clinician of the transfer request:** Click on the “Send to Do” button on the top right hand side of your screen. (*Please note that the “Notify” tab has been replaced by the “Send to Do” button)

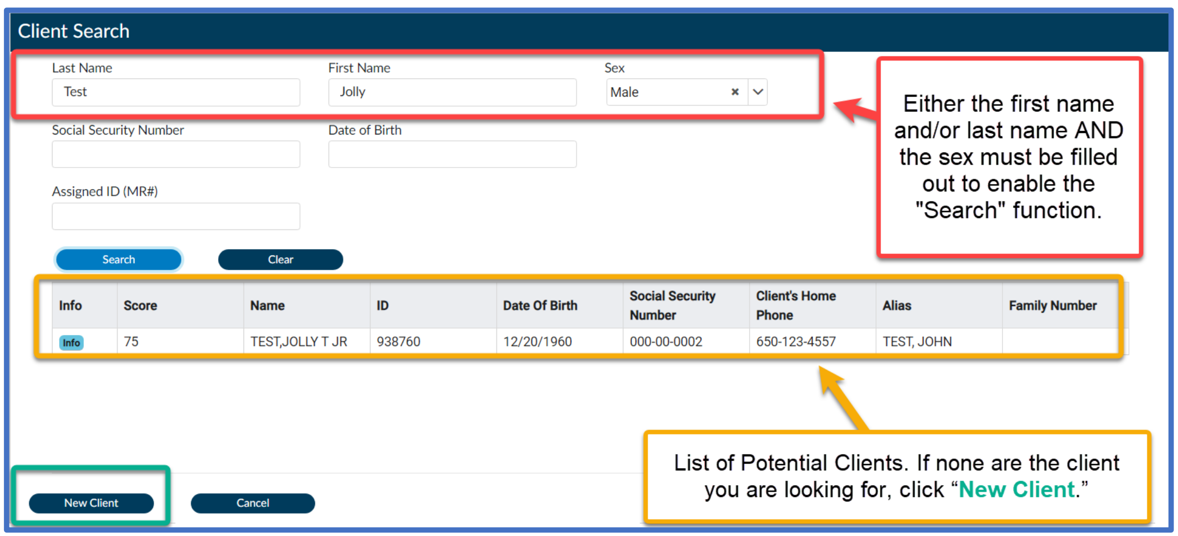
   See “Send To Do” Section of this Guide for instructions on how to use the embedded “Send To Do” function.

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

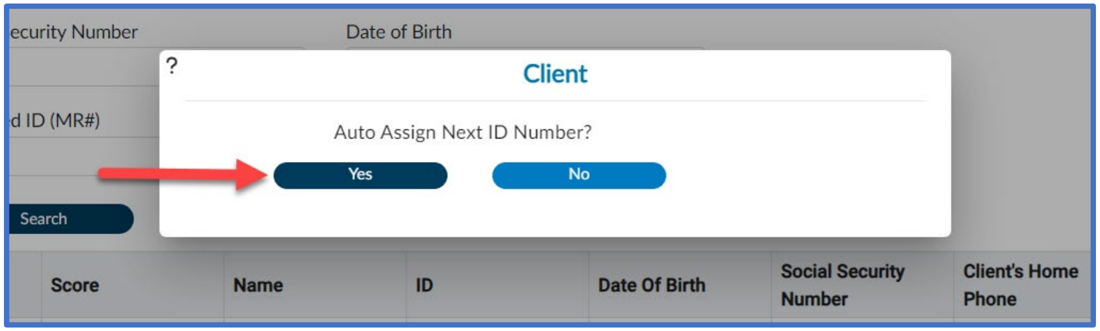
1. Search for SUD Admission Bundle:



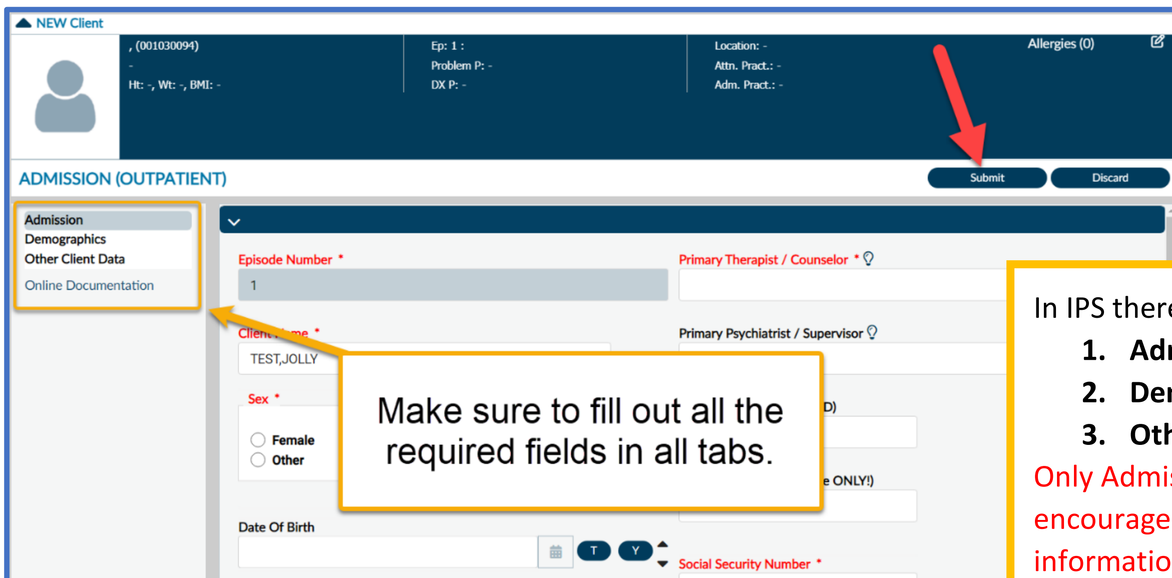
2. Enter Client Information (This screen will not appear if you already had the client's chart open):



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.



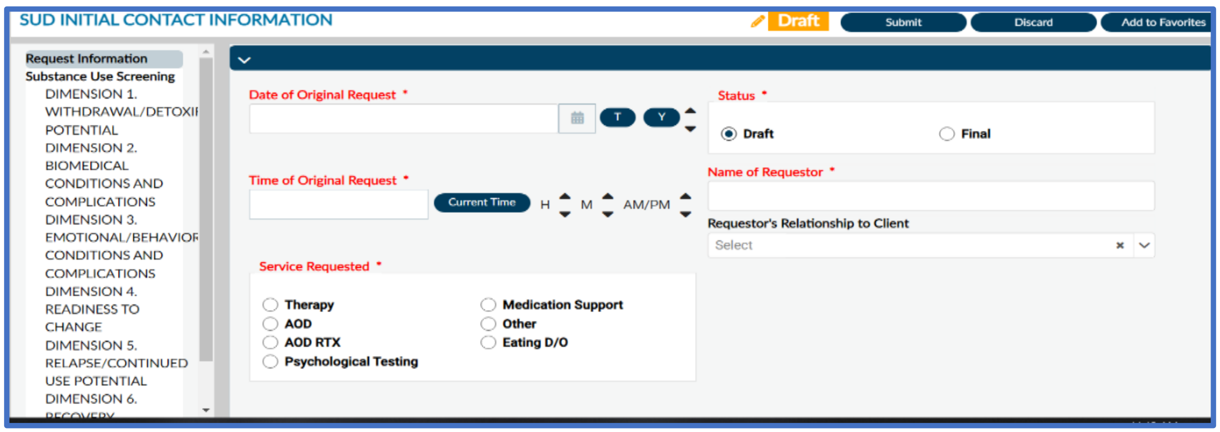
In IPS there are 3 TABS:

1. **Admission**
2. **Demographics**
3. **Other Client Data**

Only Admission has red fields, but SUD encourages contractors to always enter as much information as possible – in the end it makes life easier for all.

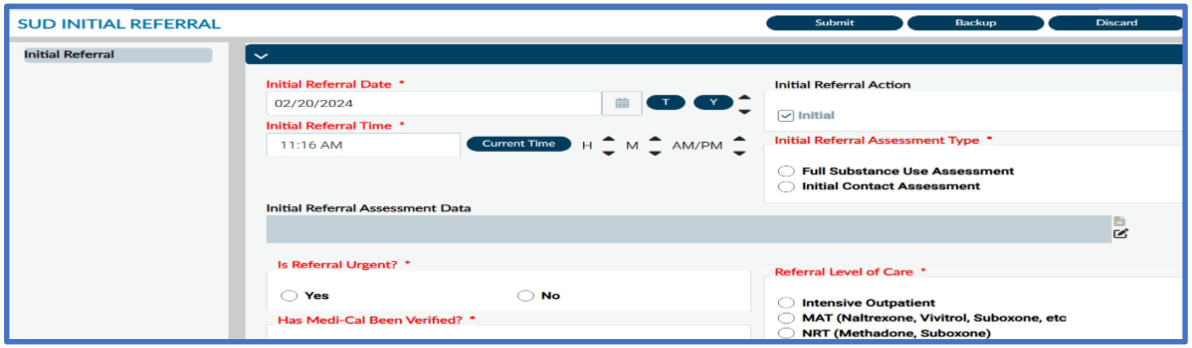
5. Click “Submit”

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



7. Click “Submit”

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



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

9. Click "Submit" and you are done.

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:** The CalAIM Assessment **Bundles** MUST be used when completing an Initial Assessment, Reassessment, or Update Assessment that includes an update to the Diagnosis.	◆ **CalAIM Adult Assessment Bundle** (includes Diagnosis Form) ◆ **CalAIM Youth Assessment Bundle** (includes Diagnosis Form) ◆ **CalAIM Adult Assessment** Form ◆ **CalAIM Youth Assessment** Form	The "V2" versions of the Adult and Youth Initial/Reassessment/Addendums have all been retired and are no longer available as of 12/16/2024.
Assessment Reports	**For assessments updates submitted before 12/16/2024**, use the Pre-CalAIM versions of the Assessment reports. **For assessments submitted on or after 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 Adult Assessment** Report ◆ **CalAIM Youth Assessment** Report ◆ **CalAIM IEP** Report	◆ **PreCalAIM Adult Assessments** Report ◆ **PreCalAIM Youth Assessments** Report ◆ **PreCalAIM IEP** Report
Diagnosis Forms and Reports	**For any assessments and diagnosis updates submitted on or after 12/16/2024:** The Assessment Bundle (which includes the Diagnosis form) MUST be used to enter all diagnoses 12/16/2024 and onward.	◆ **Diagnosis** Form ◆ **CalAIM Dx Report Current** – Use to see the most recent diagnoses entered for the client. ◆ **CalAIM Dx Report Historical**	◆ **Dx from PreCalAIM Adult Assessment Rpt** ◆ **Dx from PreCalAIM Youth Assessment Rpt** *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 report 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**

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 Treatment Plan Addendum” form to add information.	Contact QM.
Included information that should not have been included.	Contact QM.	Contact QM.	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 “Delete Draft Progress Note” button on the note.	Use Delete button. See instructions in here.	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.

Section 6

Assessments (MH) and 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.**

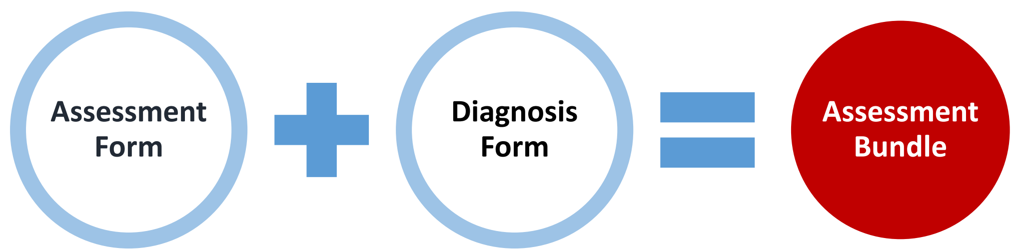
If you need to view the contents of the form, you may use the "PreCalAIM" versions of the assessment reports. If you see that the client does not have a current assessment in place because the old assessment was not finalized, then you should create a brand new assessment using the CalAIM version of 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**.

You **MUST** Use the **Assessment Bundle** when completing an **Initial** or **Reassessment**.

Do NOT skip or cancel the Diagnosis Form.*



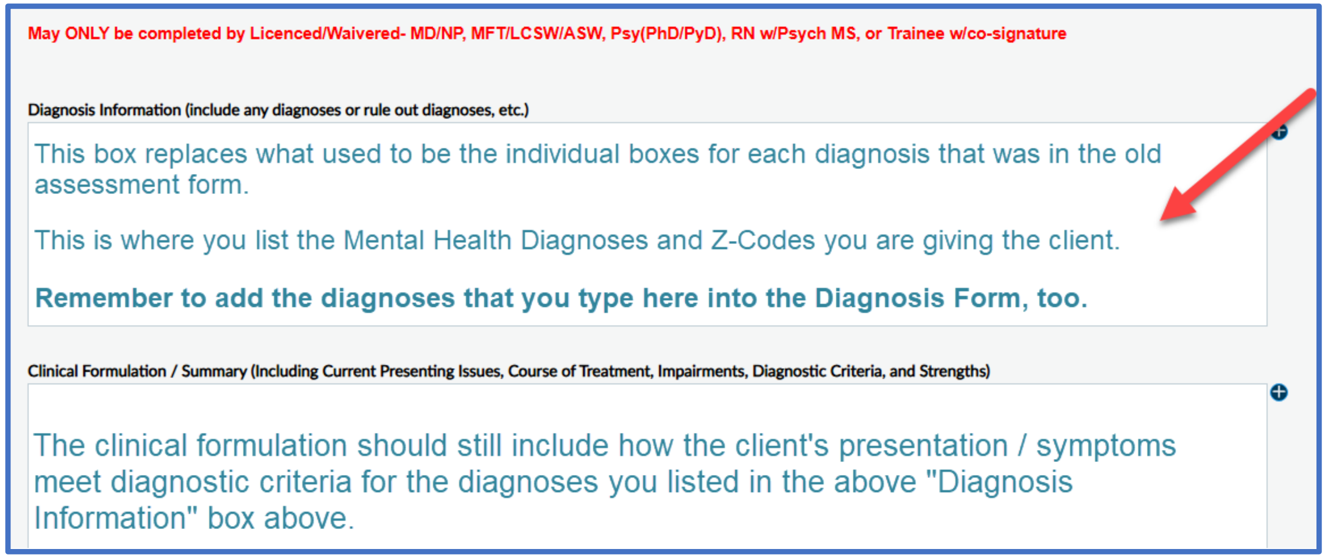
* Because the Diagnosis Form cannot be routed for co-signature, **staff who require co-signature** should get the assessment co-signed first before filling out the Diagnosis Form. In these cases, staff who require a co-signature will need to open the Diagnosis form separately after the assessment is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

Return to Table of Contents

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

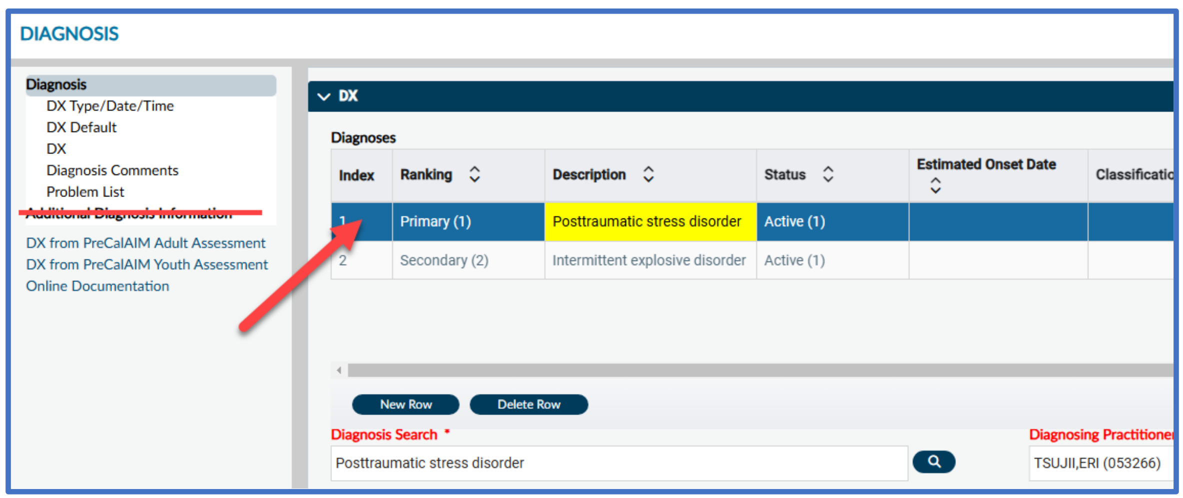
The first place where you will be documenting the diagnosis is in the "Diagnosis Information" box in final Domain of the CalAIM Assessment. This is the section right before you finalize the assessment in Avatar.

Assessment Form



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.

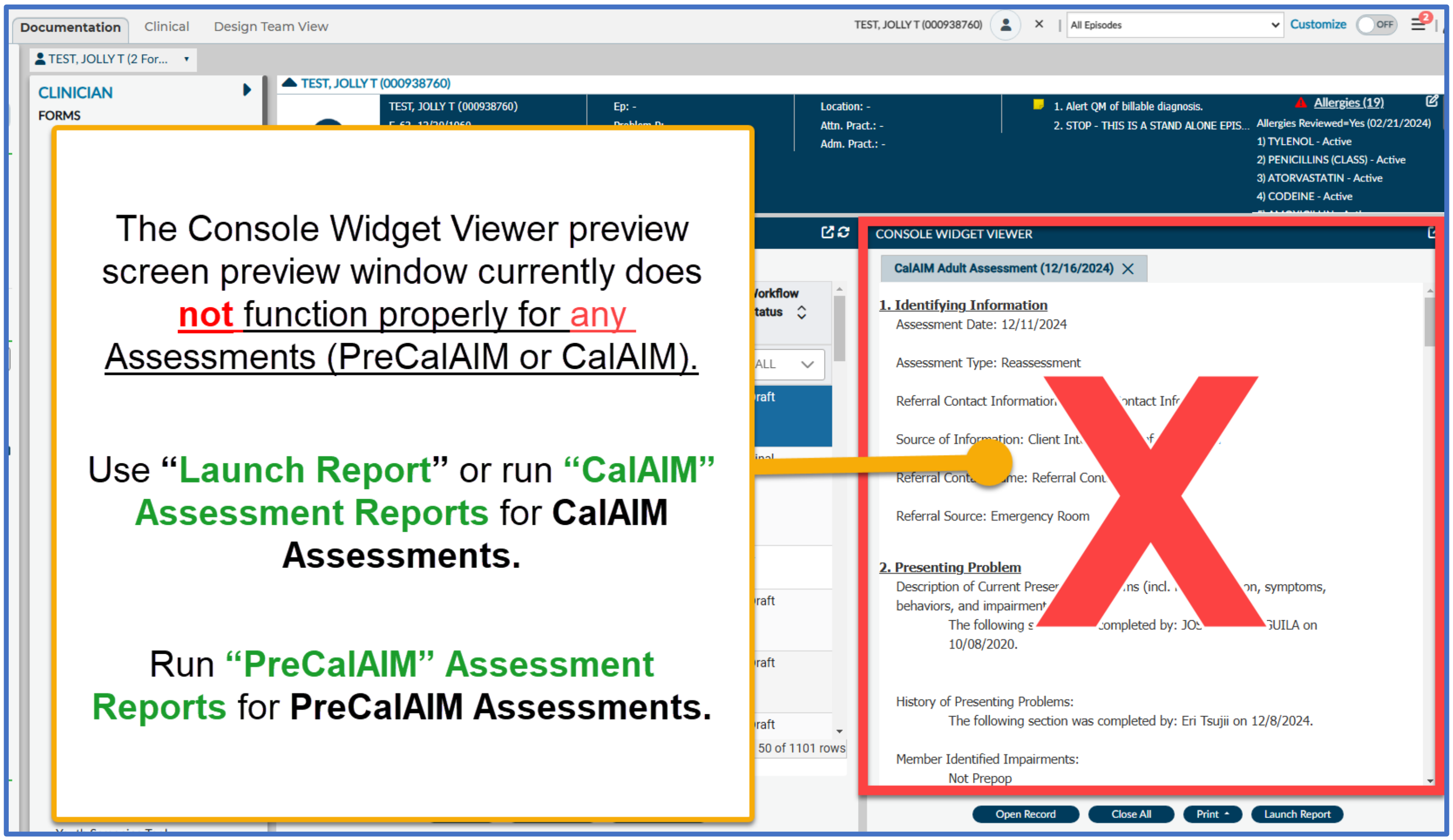
Diagnosis Form



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 cannot 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.

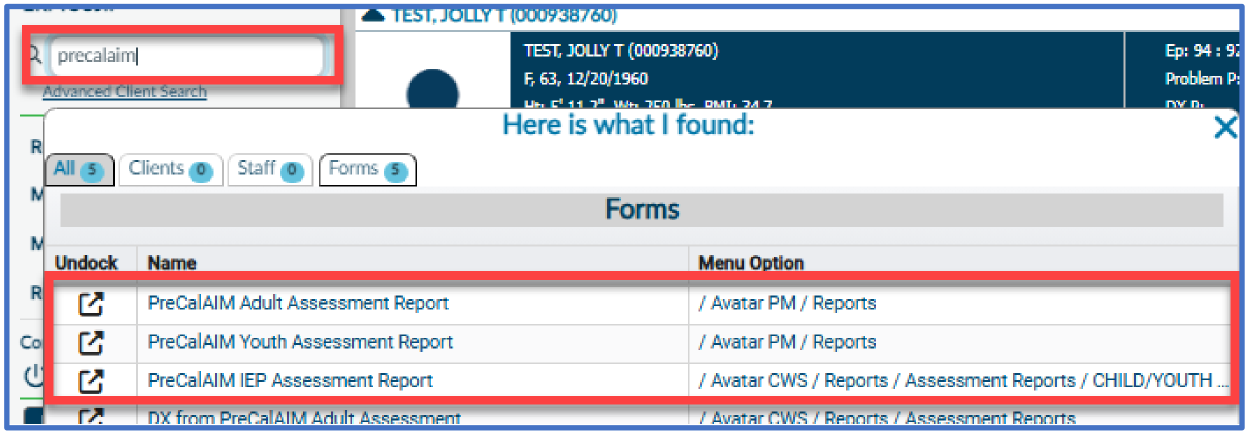


Viewing Pre-CalAIM Assessments

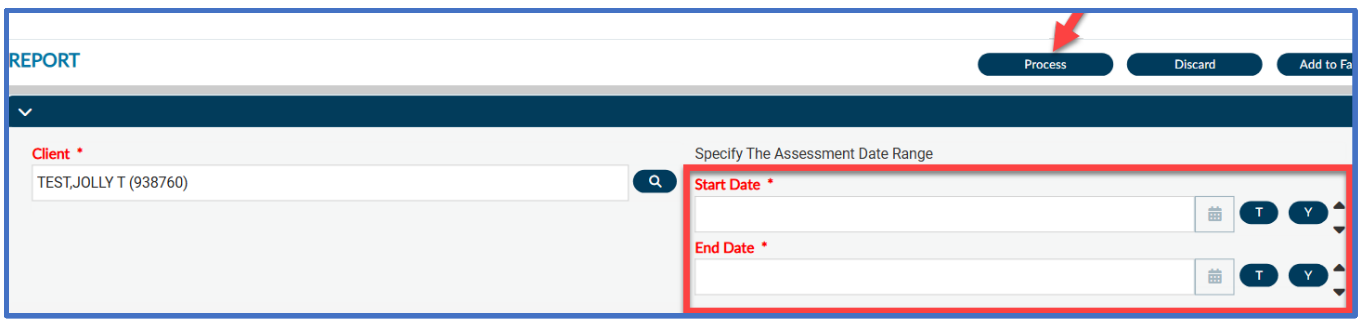
"V2" Assessment forms Last Submitted in Avatar 12/8/2024 and Earlier

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**"



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



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

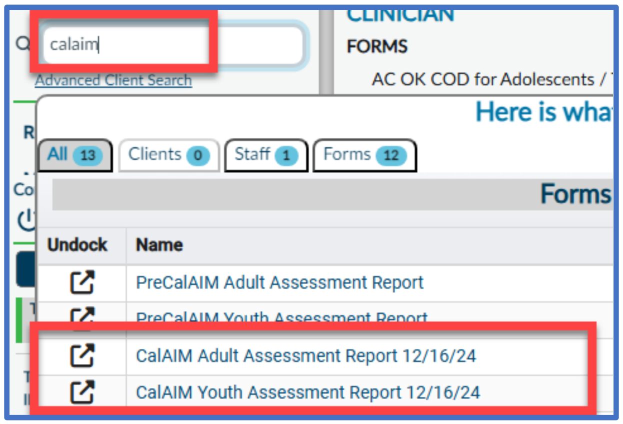
Viewing CalAIM Assessments (Option 1)

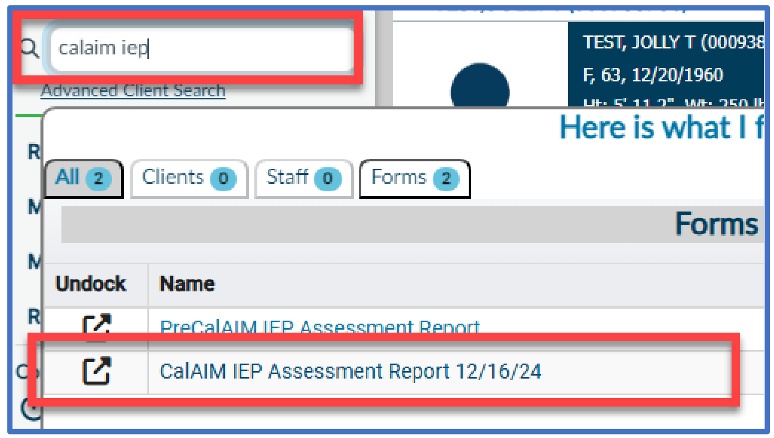
Forms Submitted in Avatar beginning 12/9/2024 and Later

Option 1

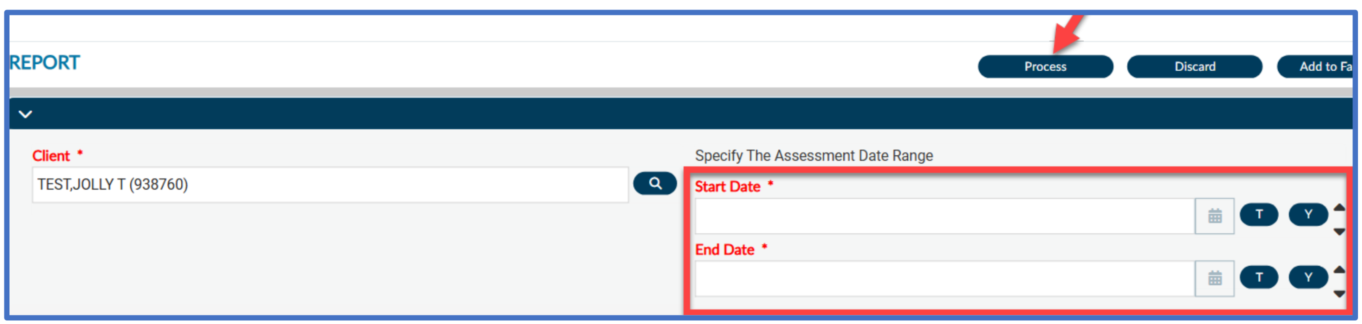
Step 1) Open your client's chart in Avatar NX

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**"





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



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

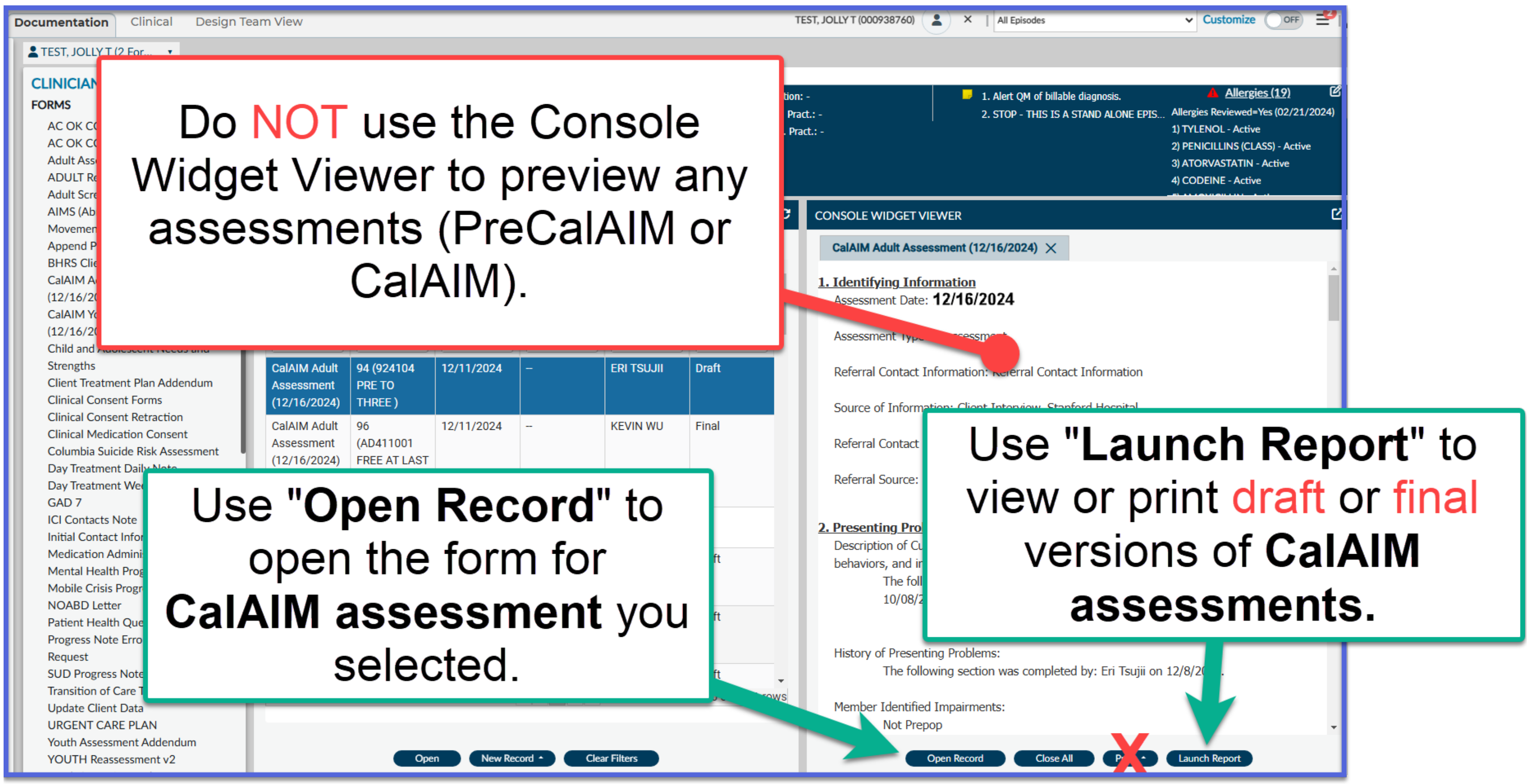
Option 2

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.



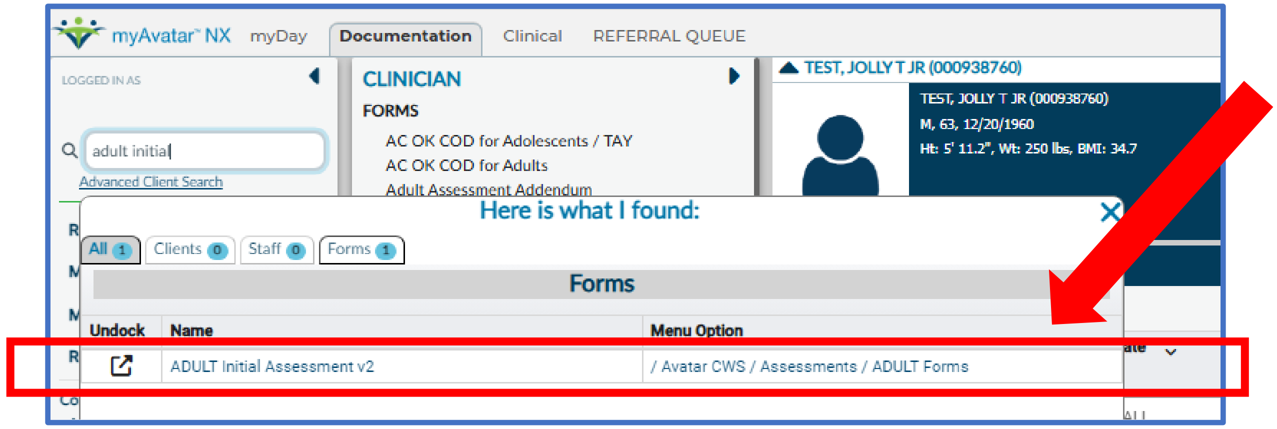
41. What happens if I try to use something other than the PreCalAIM Assessment Reports to view PreCalAIM Assessments?

	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.

42. Deleting Draft Assessments

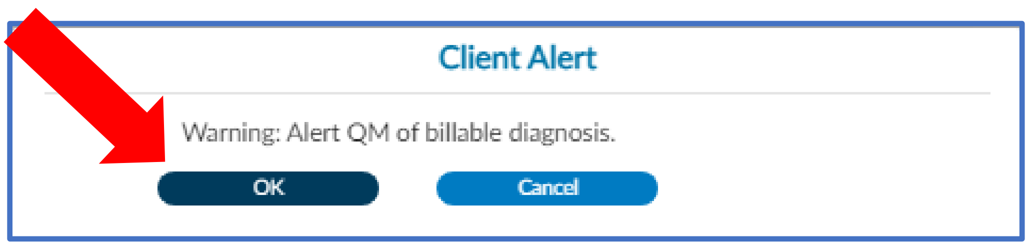
Step 1: Select a client in Avatar

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

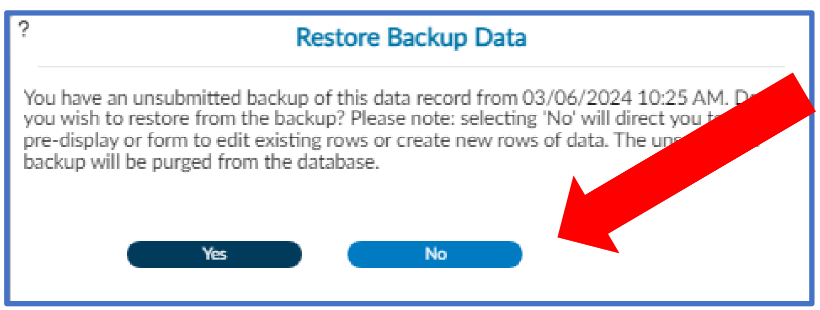


Step 3: Addressing Pop Ups that might come up:

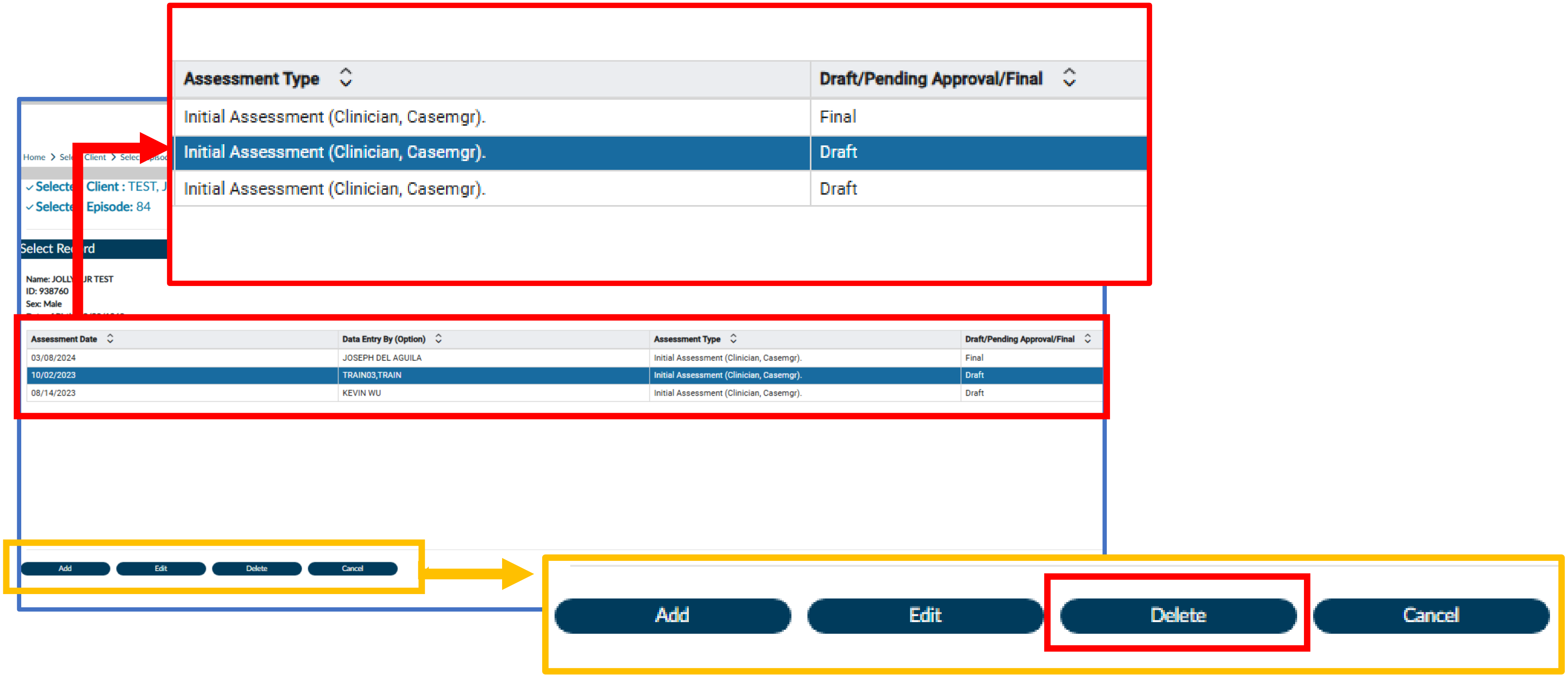
If you see this Pop Up, click "Ok"



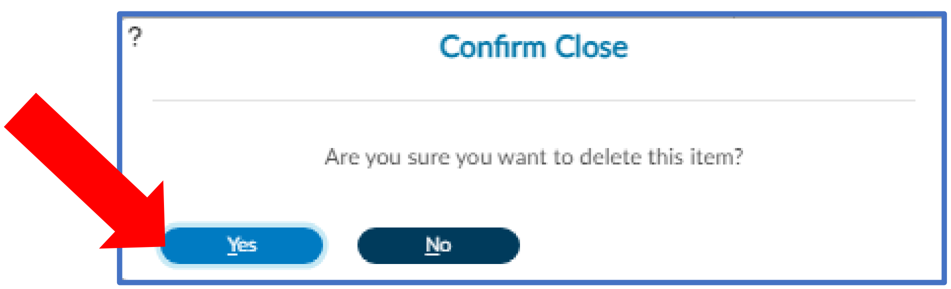
If you see this Pop Up, click "No"



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?

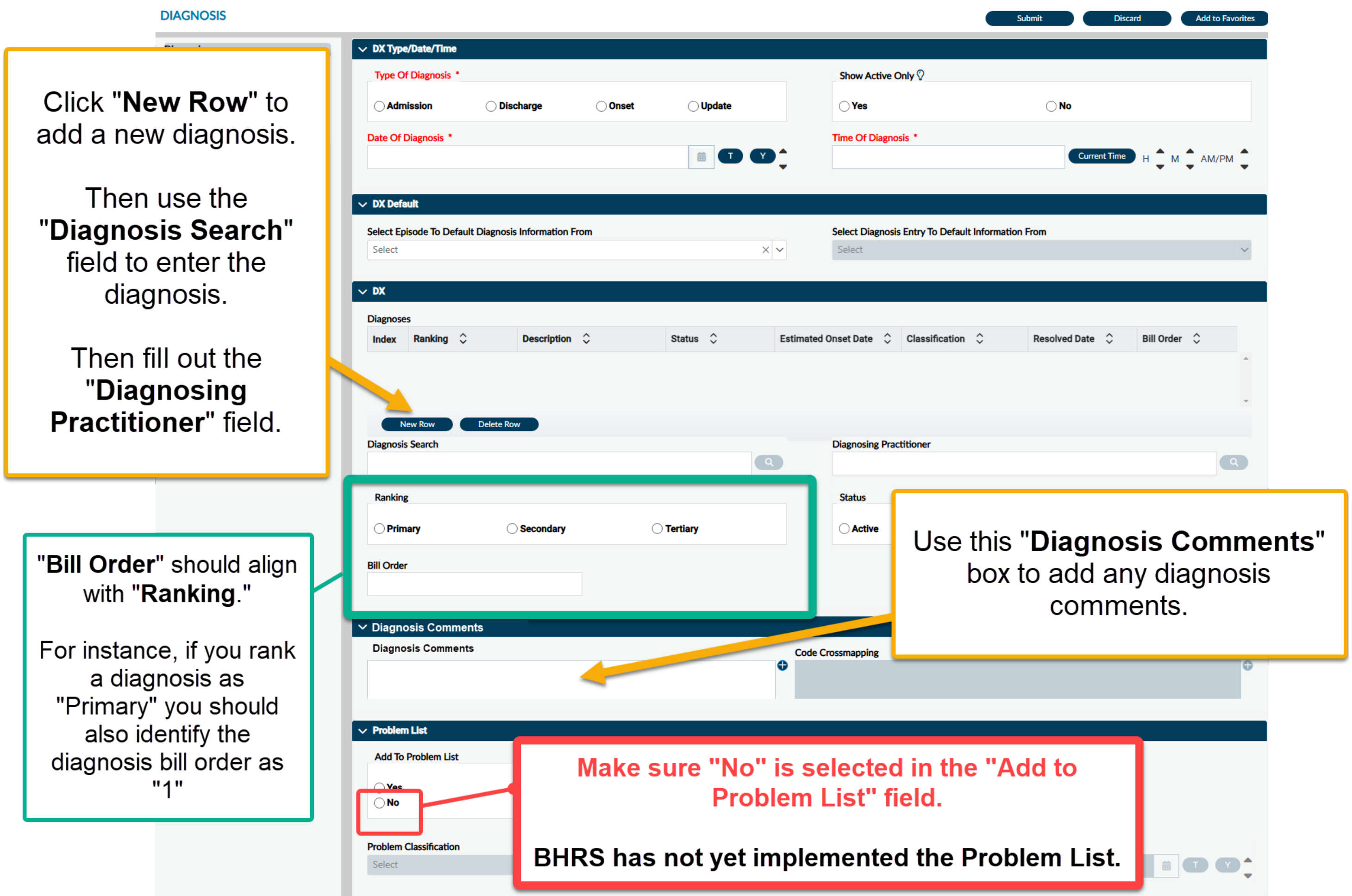
For clinical staff, when adding, updating, or editing a diagnosis, you MUST use one of the assessment bundles. The bundles include both:

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.

REMEMBER: **Only staff for whom it is within their scope of practice to diagnose mental health conditions may submit a diagnosis form.**

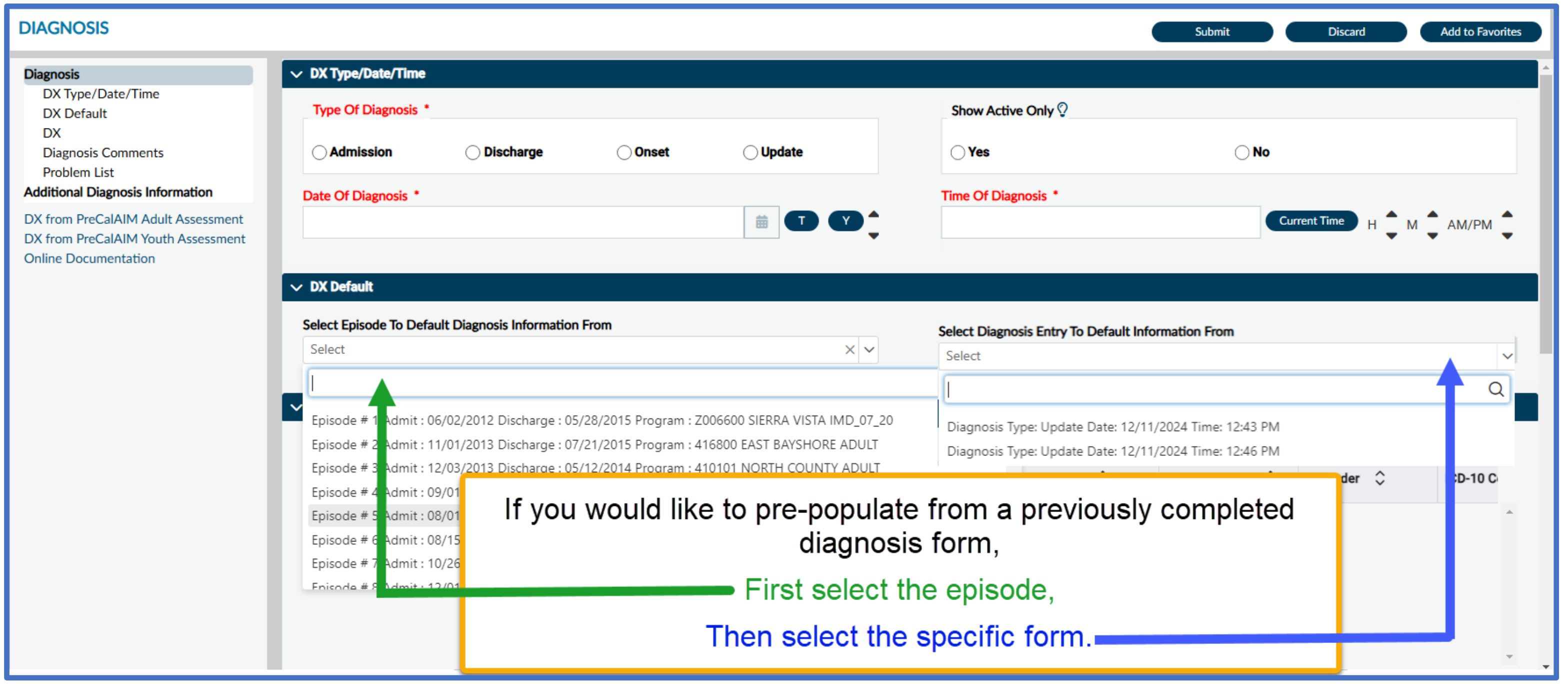
Non-licensed/registered/waivered staff who have identified Z-codes to add to the client's diagnosis list MUST discuss the Z code with the clinician on the team, and the clinician may then submit an updated diagnosis form to include the Z code suggested by the non-LPHA staff.

Please refer to the BHRS Documentation Manual and Scope of Practice Grid to view more information about who may diagnose.



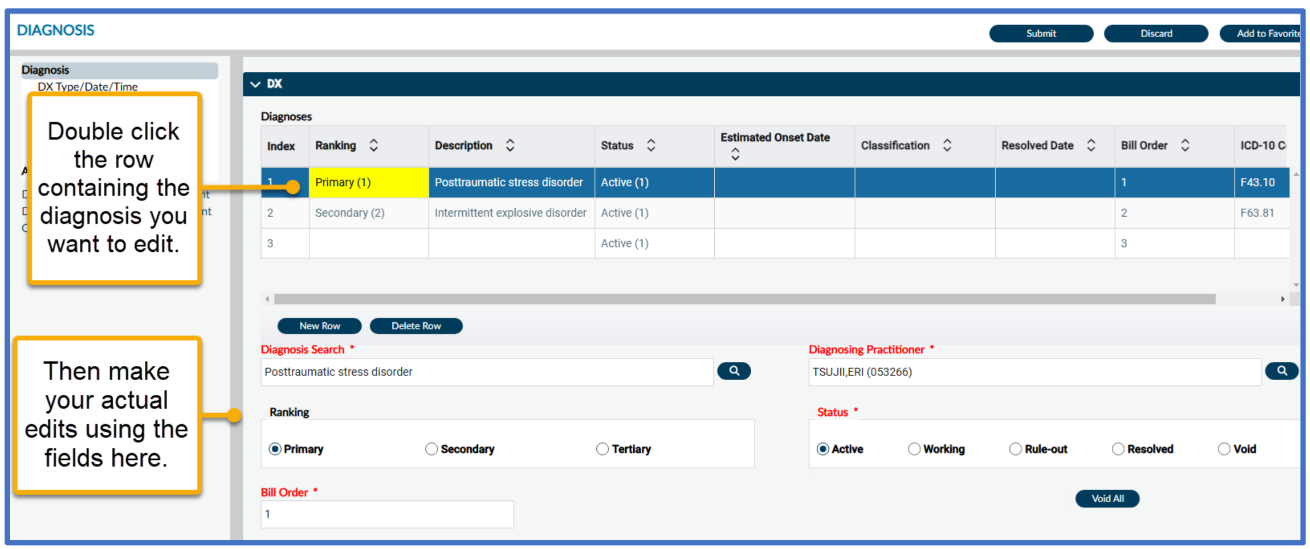
44. Can I populate diagnoses that were previously submitted using the Diagnosis Form?

Yes! To do so, please follow the instructions here:



45. How do I edit a diagnosis?

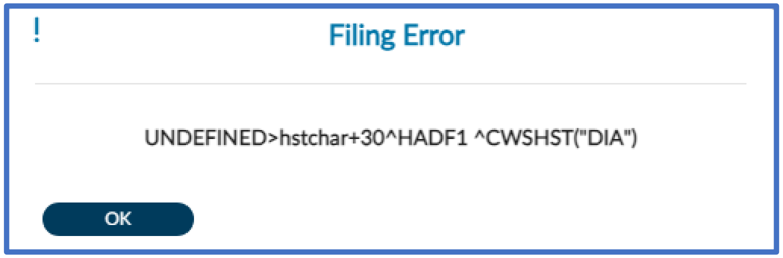
Simply double click on the diagnosis you want to edit and then proceed to make the edits using the appropriate fields.



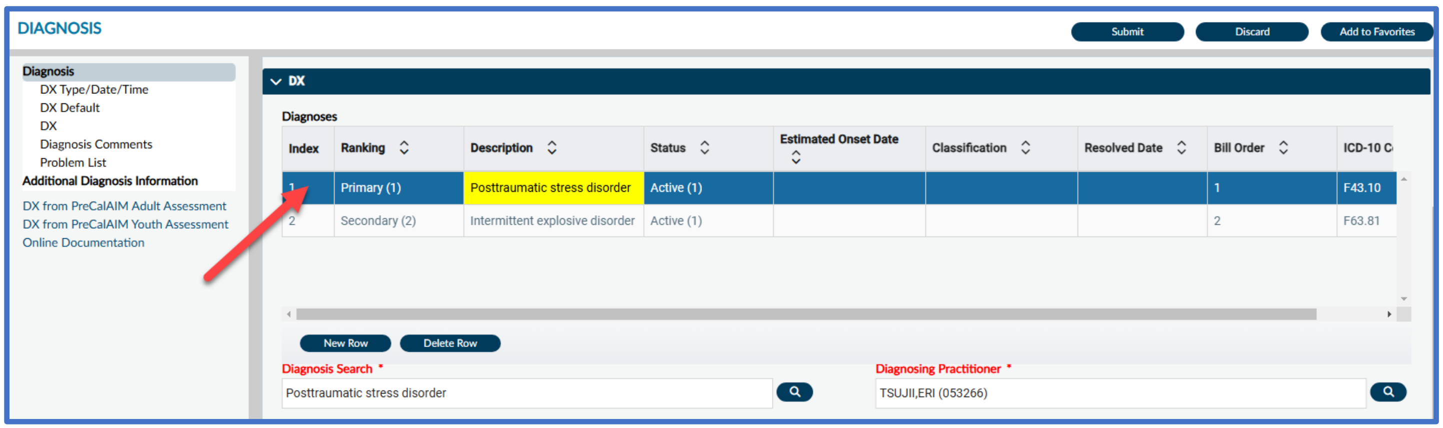
Error Message on Diagnosis Form (MH and SUD)

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!



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 this question and answer to see what the diagnosis sections of these two forms look like.

Viewing and Printing Diagnoses (MH and SUD)

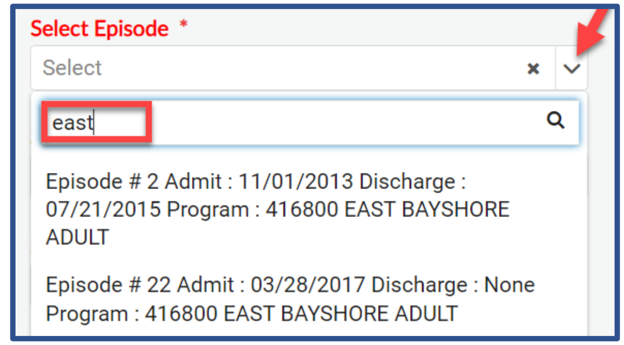
48. Is there a difference in Avatar in how I can view Pre-CalAIM diagnoses versus CalAIM diagnoses?

	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

49. Selecting the episode for a progress note without scrolling

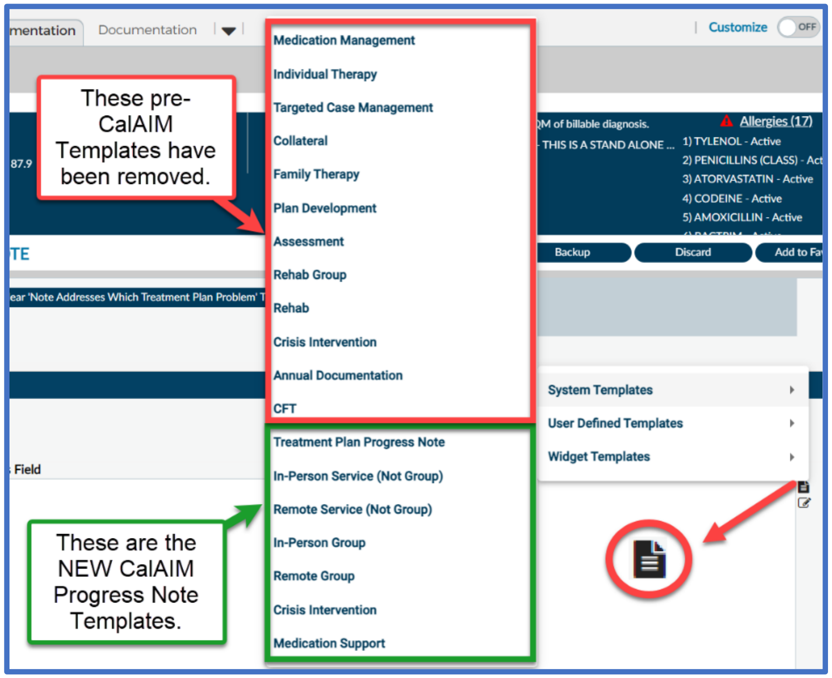


You can reduce the episodes that show in your drop down by typing in a search term in the episode field. Click the down arrow of the “Select Episode” field and a search bar will appear above the drop-down menu items.

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.



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 **one progress note.**

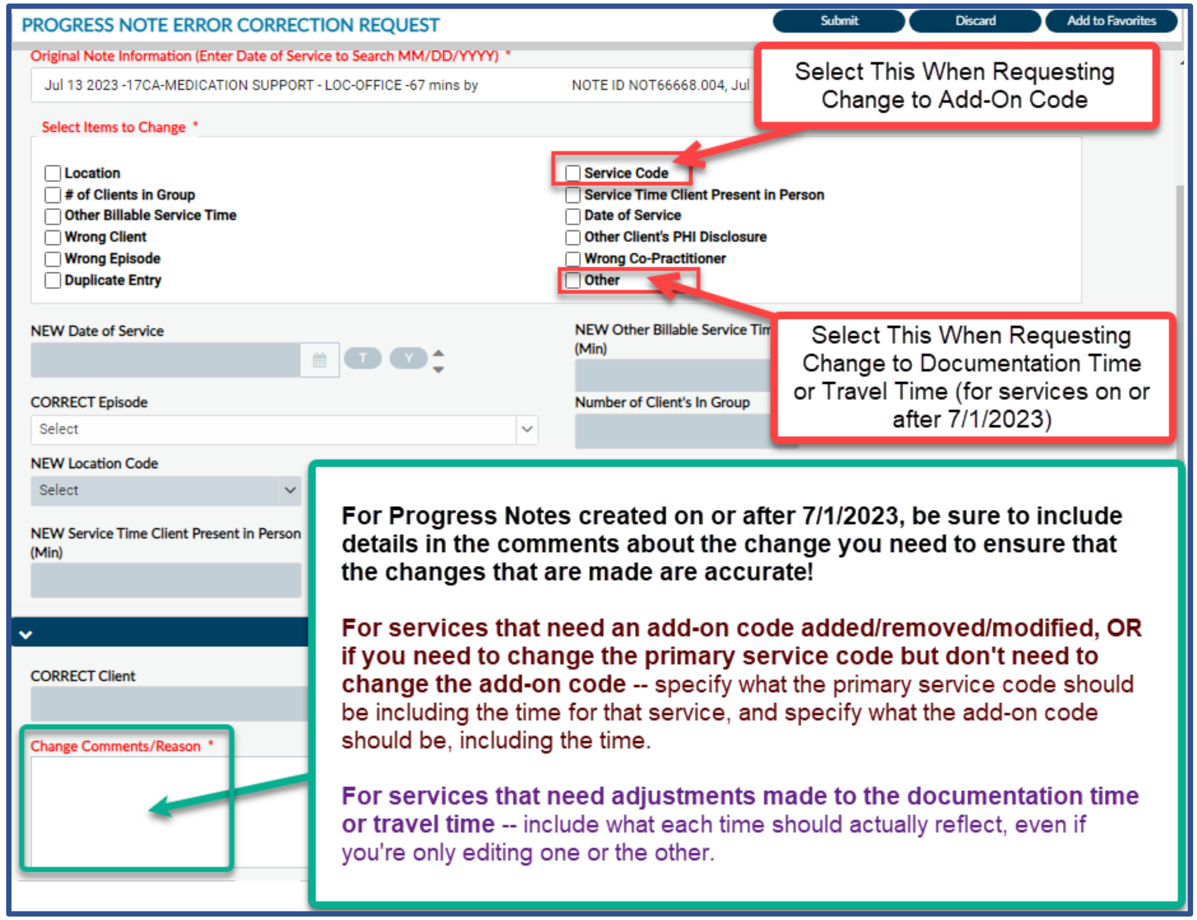
Group services may be documented in separate notes – Groups that are offered on the same day to the same client by the same provider do not need to be bundled into the same note.

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.

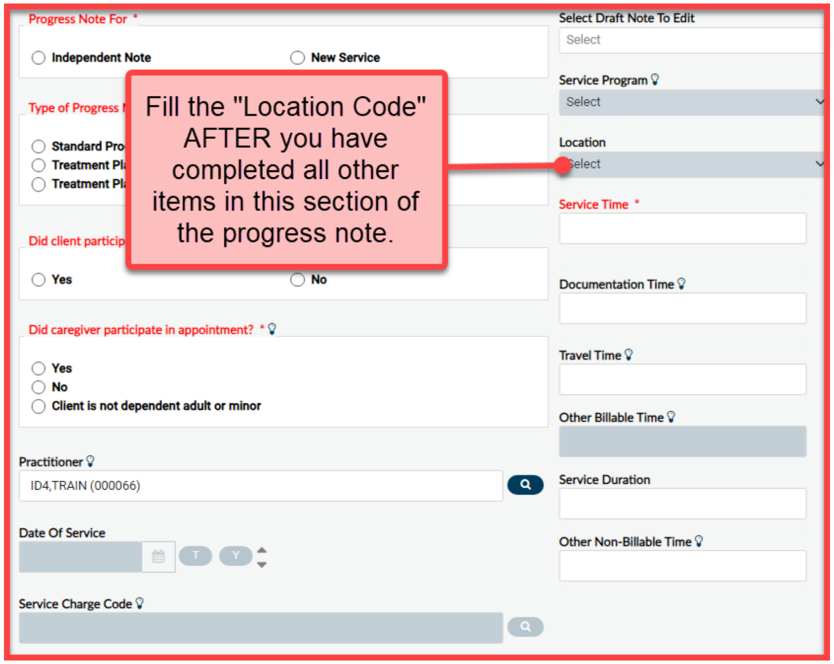


52. Location Code keeps defaulting to OFFICE!

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.

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.

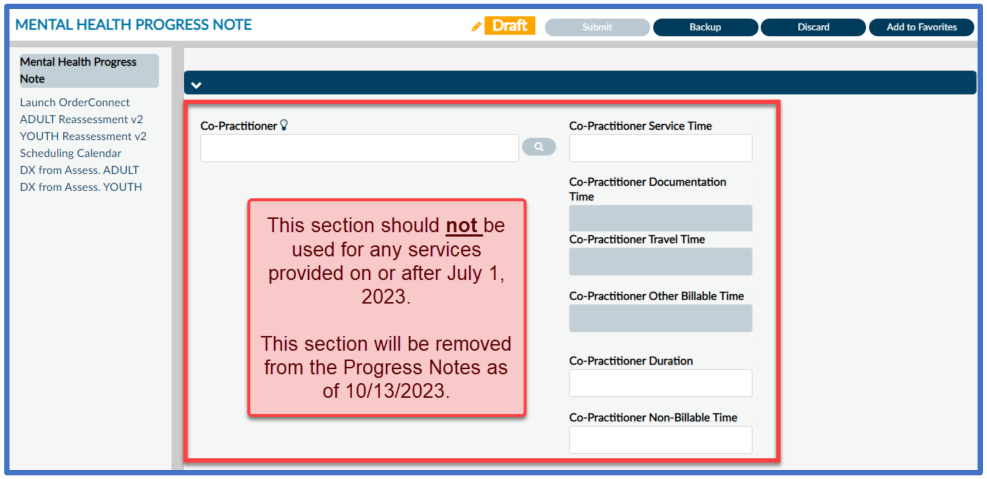


While we continue to work on a fix to this issue, we recommend that you fill out the "Location Code" ***after*** you have filled out all of the other parts of the top section of the progress note.

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 HS_BHRS_ASK_QM@smcgov.org.

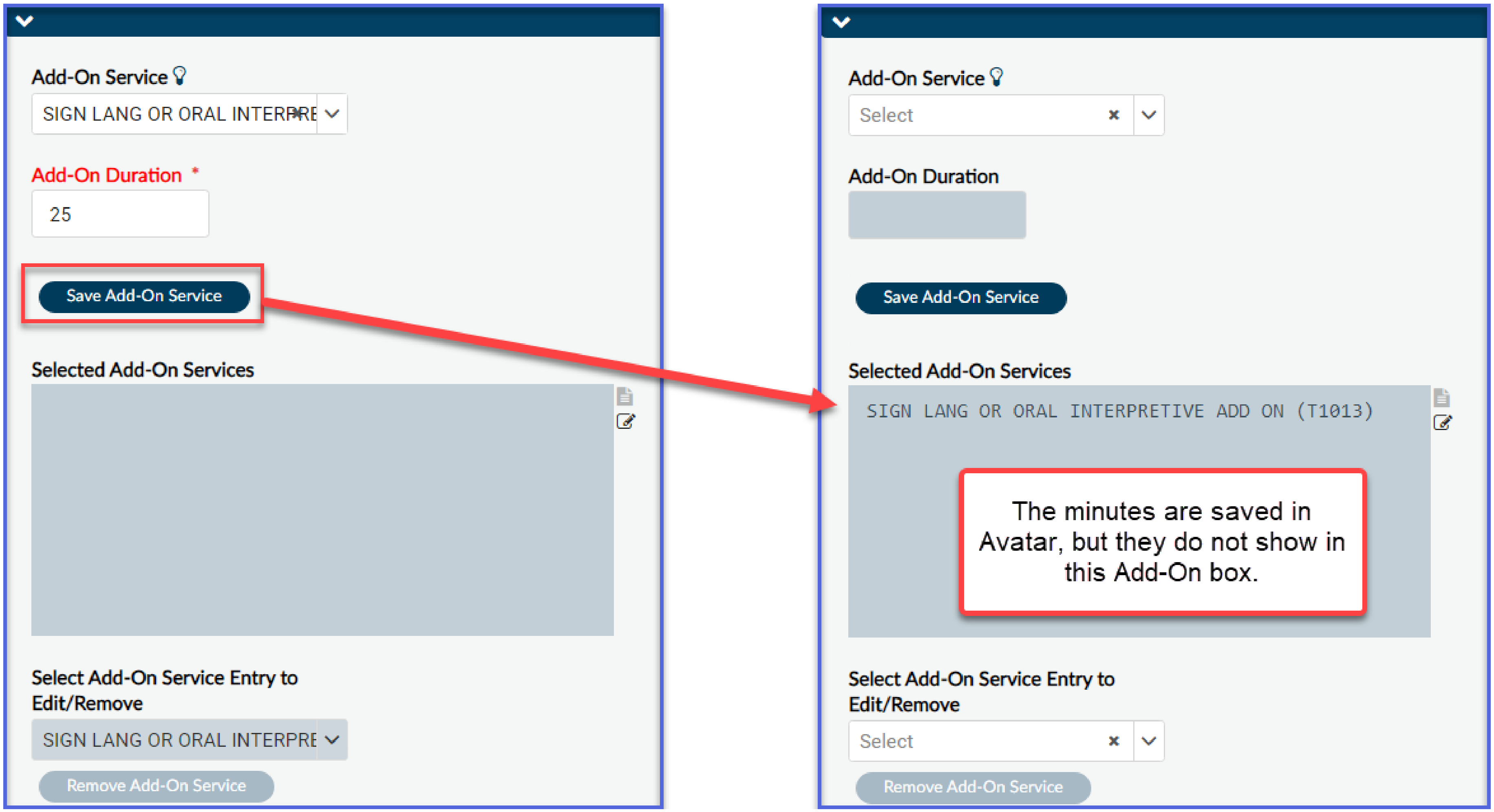
53. Co-Practitioner Section in Progress Note

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 co-practitioner 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.



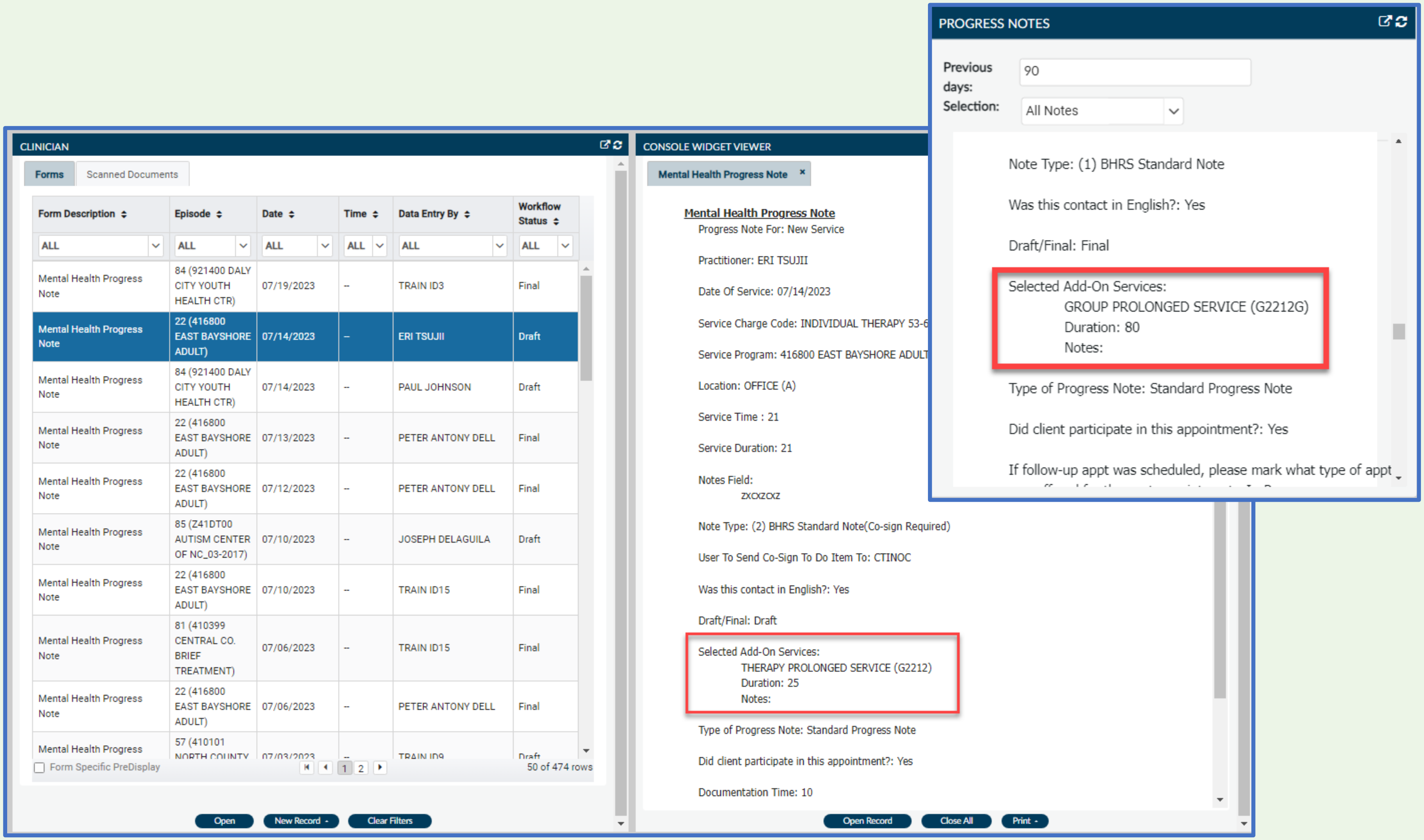
54. Add-On Codes Trouble Shooting

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.



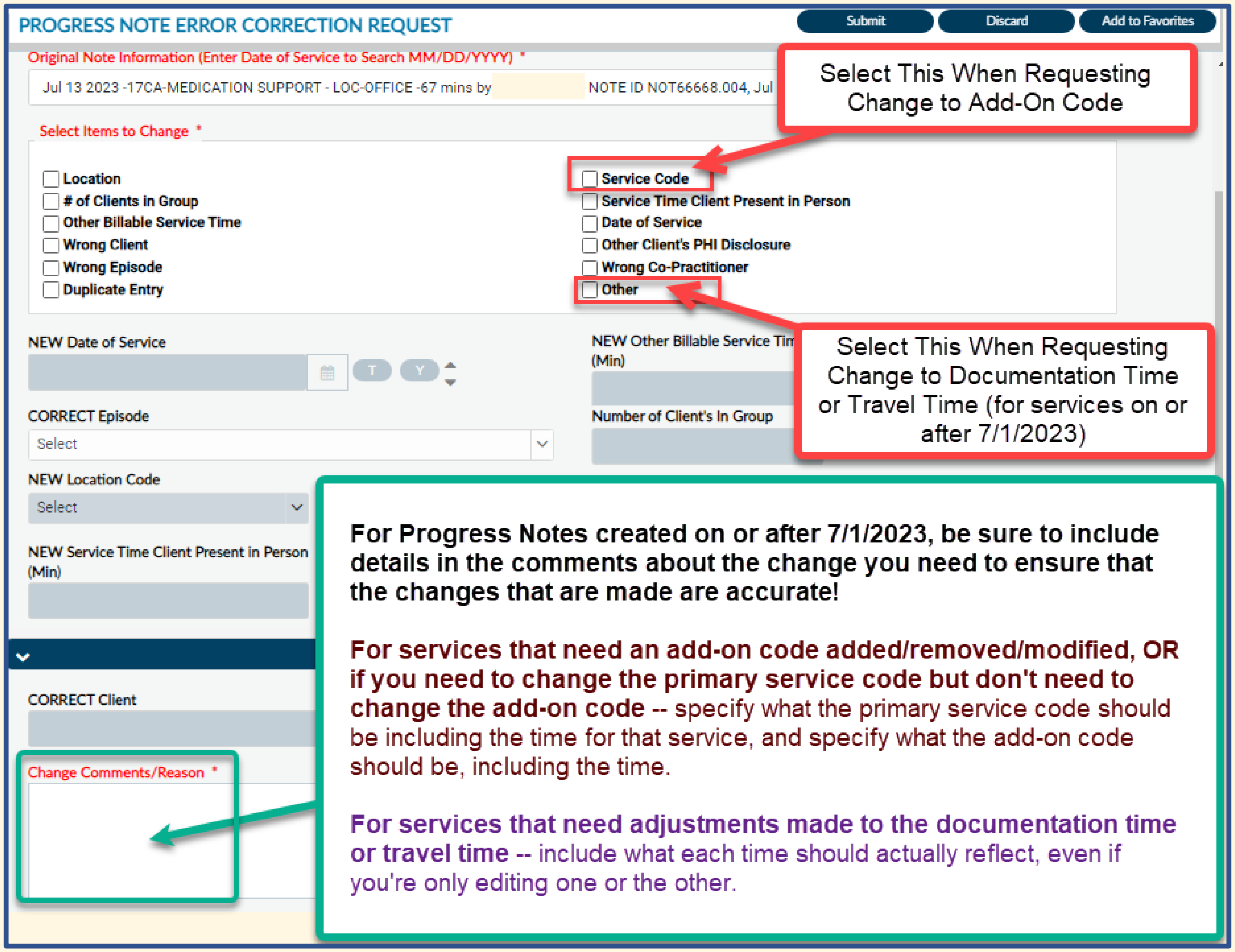
Checking Add-On Codes

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.



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.

CONSOLE WIDGET VIEWER

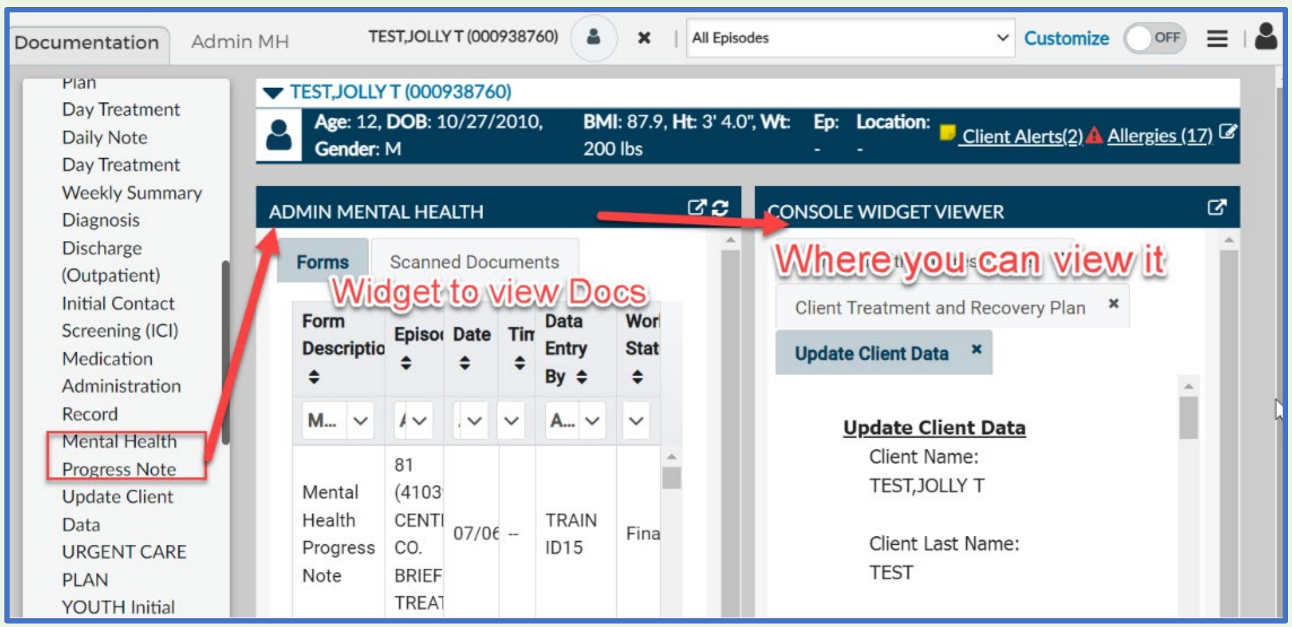
Step 1) Select a client.

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:

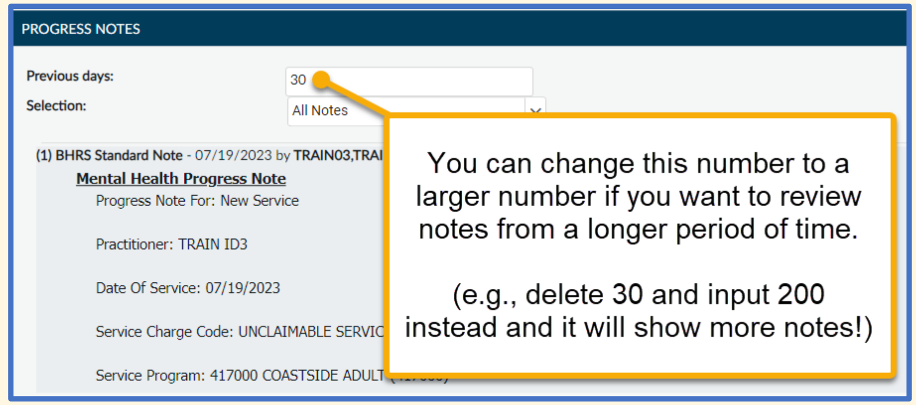
- Form Description
- Episode
- Date
- Time
- Data Entry By
- Workflow Status

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".

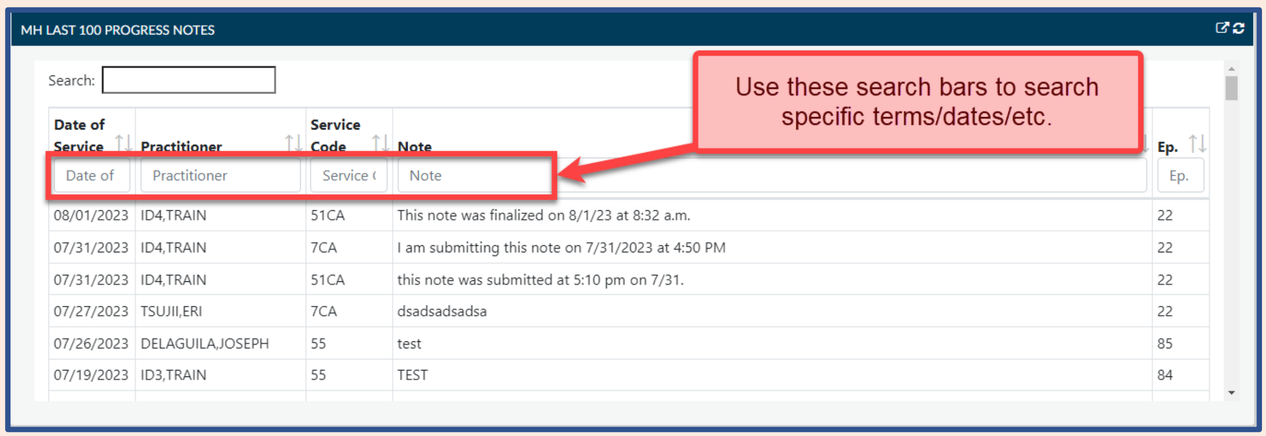


Return to Table of Contents

Progress Notes



MH Last 100 Progress Notes



Printing Progress Notes

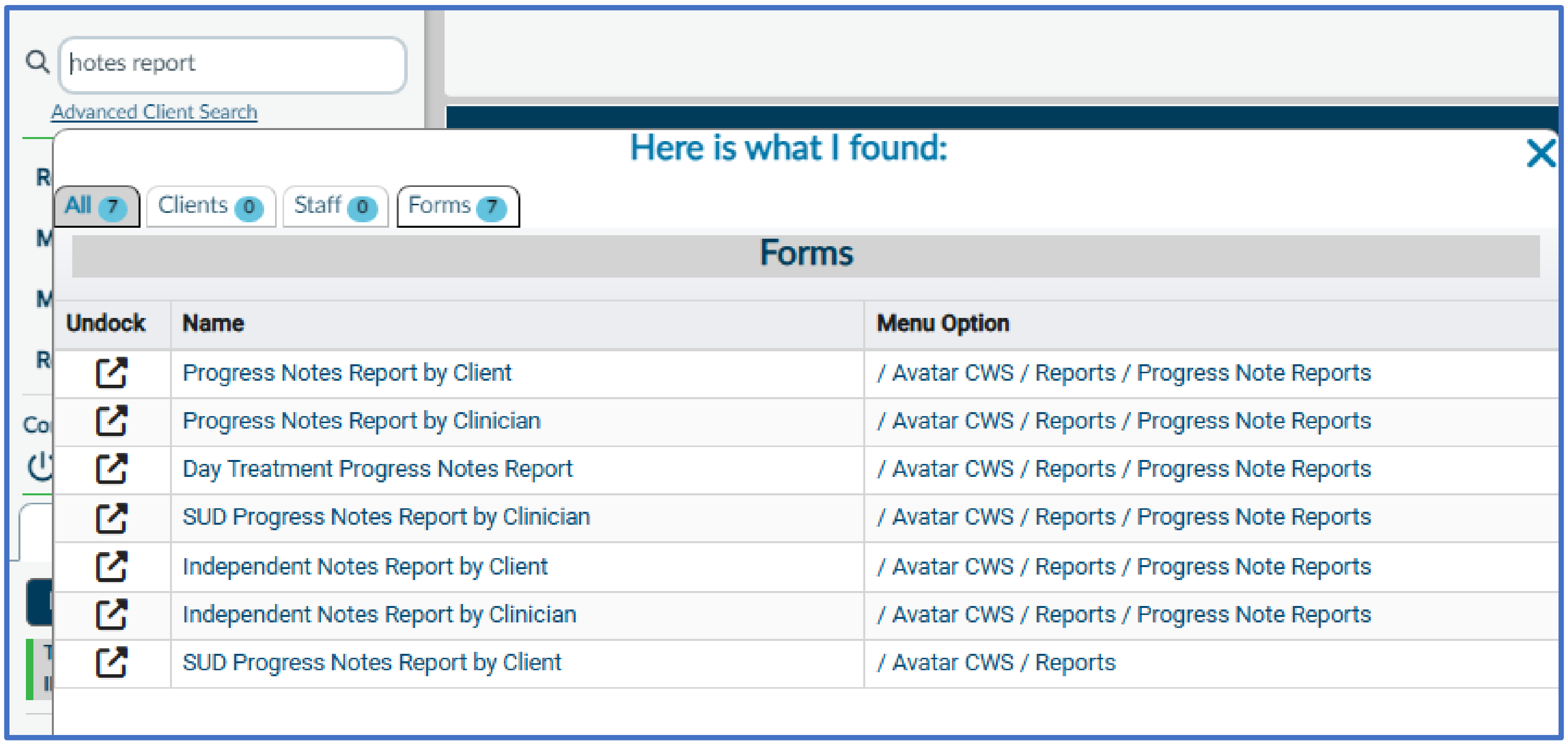
56. How do I print Progress Notes in bulk?

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 **not** 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.

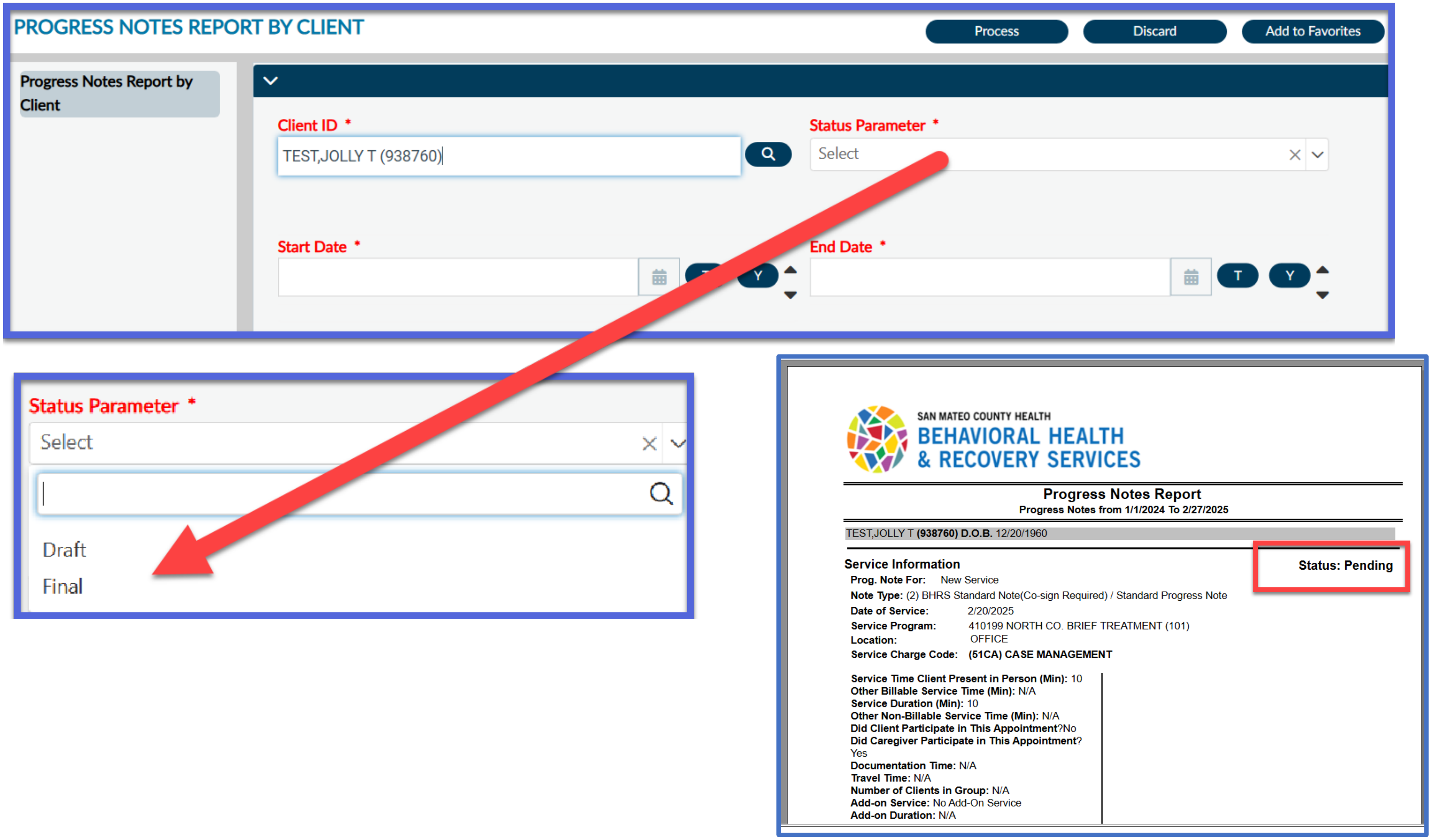


Undock	Name	Menu Option
	Progress Notes Report by Client	/ Avatar CWS / Reports / Progress Note Reports
	Progress Notes Report by Clinician	/ Avatar CWS / Reports / Progress Note Reports
	Day Treatment Progress Notes Report	/ Avatar CWS / Reports / Progress Note Reports
	SUD Progress Notes Report by Clinician	/ Avatar CWS / Reports / Progress Note Reports
	Independent Notes Report by Client	/ Avatar CWS / Reports / Progress Note Reports
	Independent Notes Report by Clinician	/ Avatar CWS / Reports / Progress Note Reports
	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 co-signature, notes that have been approved by the co-signer. Final versions will have "**Final**" in the top right corner of the PDF.



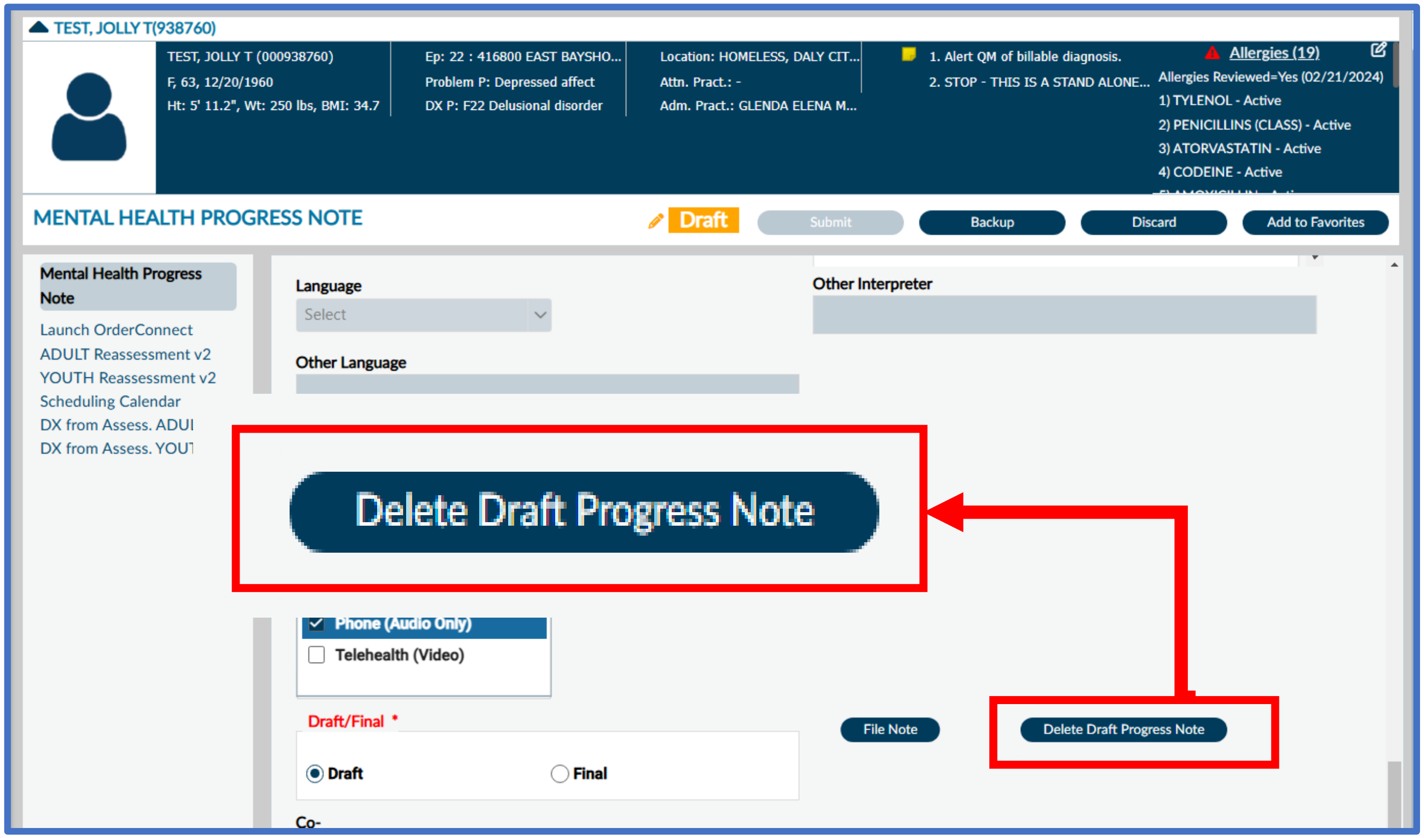
Return to Table of Contents

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

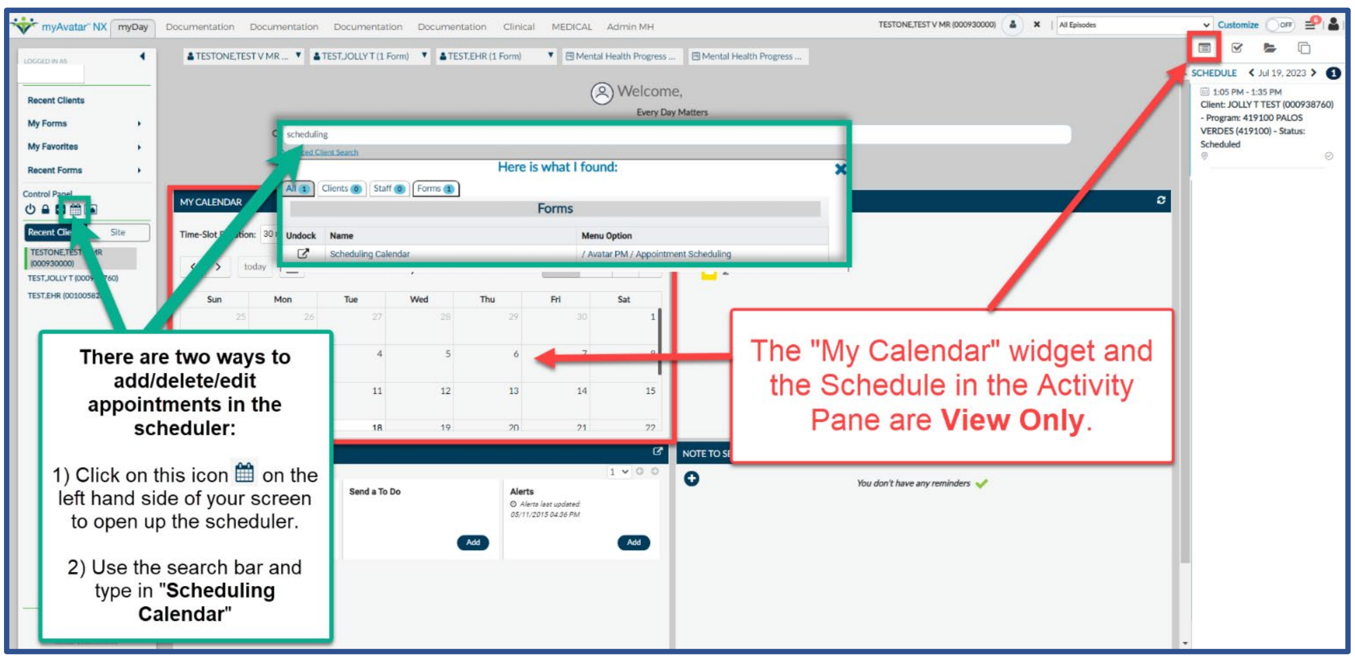
58. How do I link Outlook to my Avatar Calendar? I thought this was possible.

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).

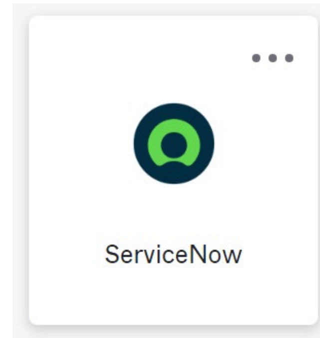
1) By searching for "Scheduling Calendar" in your search bar.
2) Clicking on the calendar icon on the left bar of your NX screen.



Signature Pads

60. Using the Signature Pad with Avatar NX

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



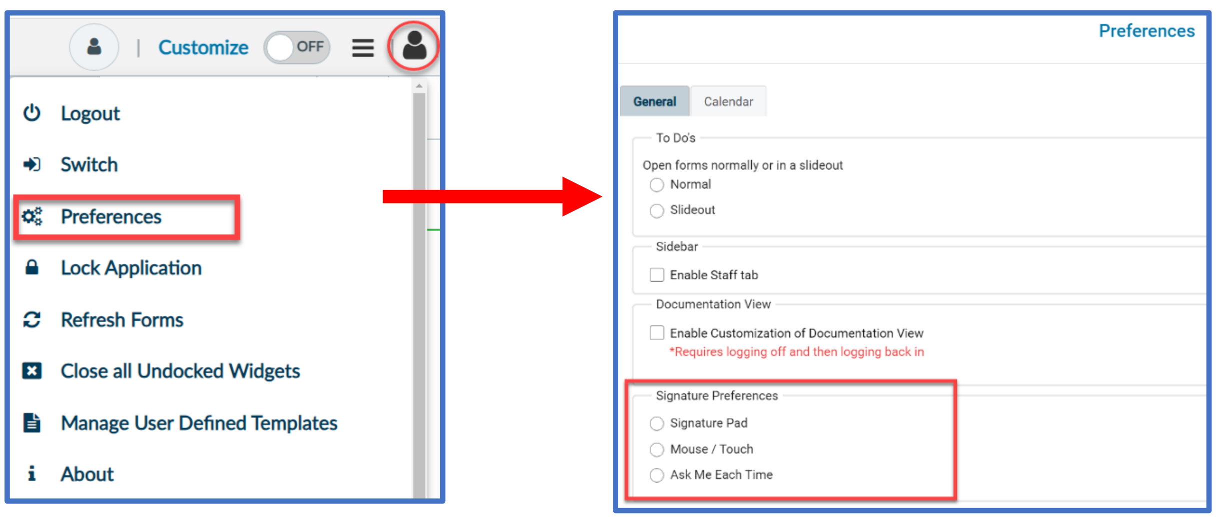
Step 1) Open a **Service Now** ticket in OKTA. Go to "**Request Services**" and then "**Applications & Software**" and then "**Application Access**."

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.

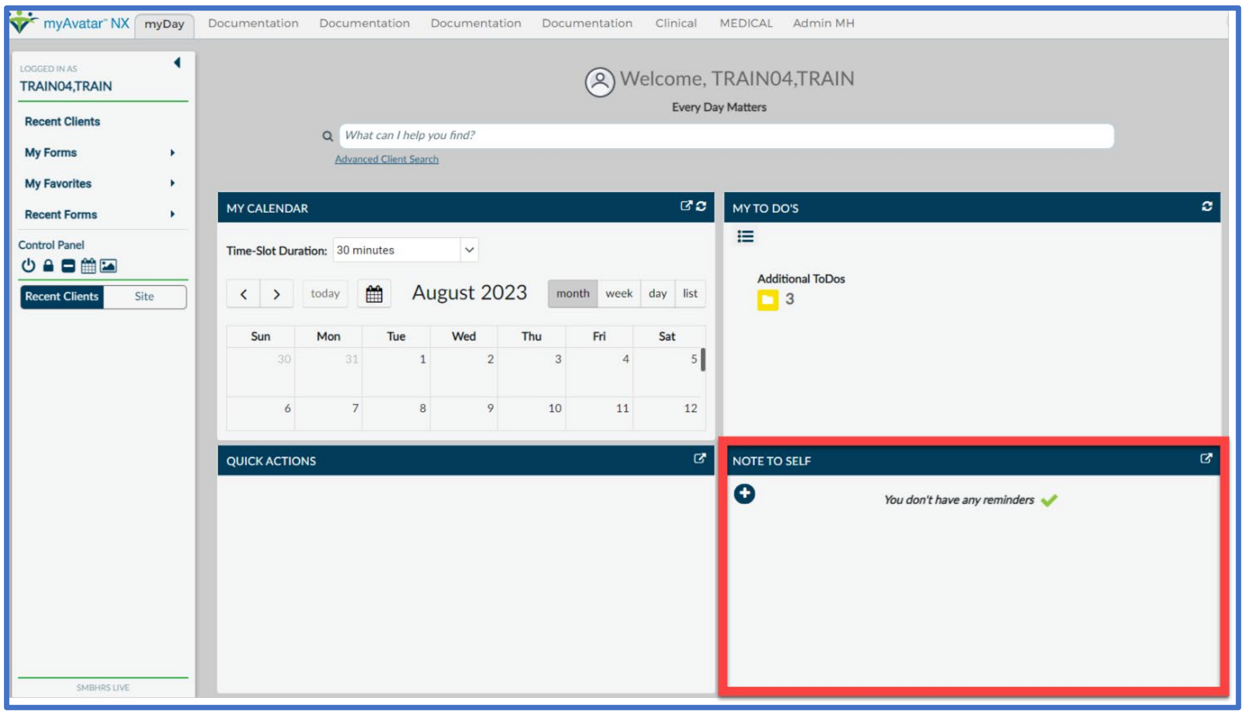


Once you have completed these two steps – the signature pad should work once again!

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

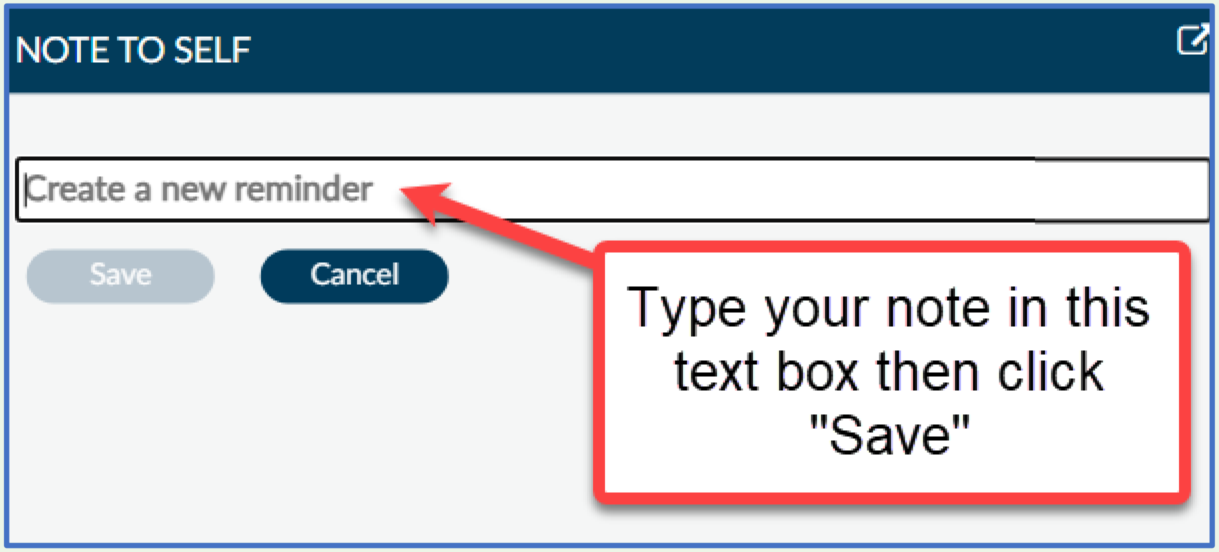
There are two types of "Notes" available in Avatar NX.

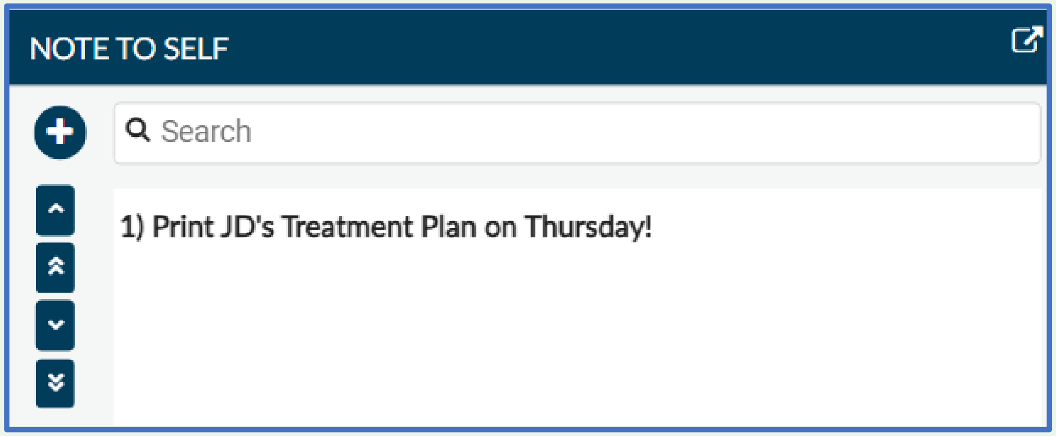
	"Note to Self"	"Notes" in Forms
Location	MyDay Tab	Available on some forms but not all
Description	Functions like a "post it note" in Avatar that only you can see.	Can be seen by all staff who have access to the form. Does not print out as part of the formal reports, but can be seen by anyone who has 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

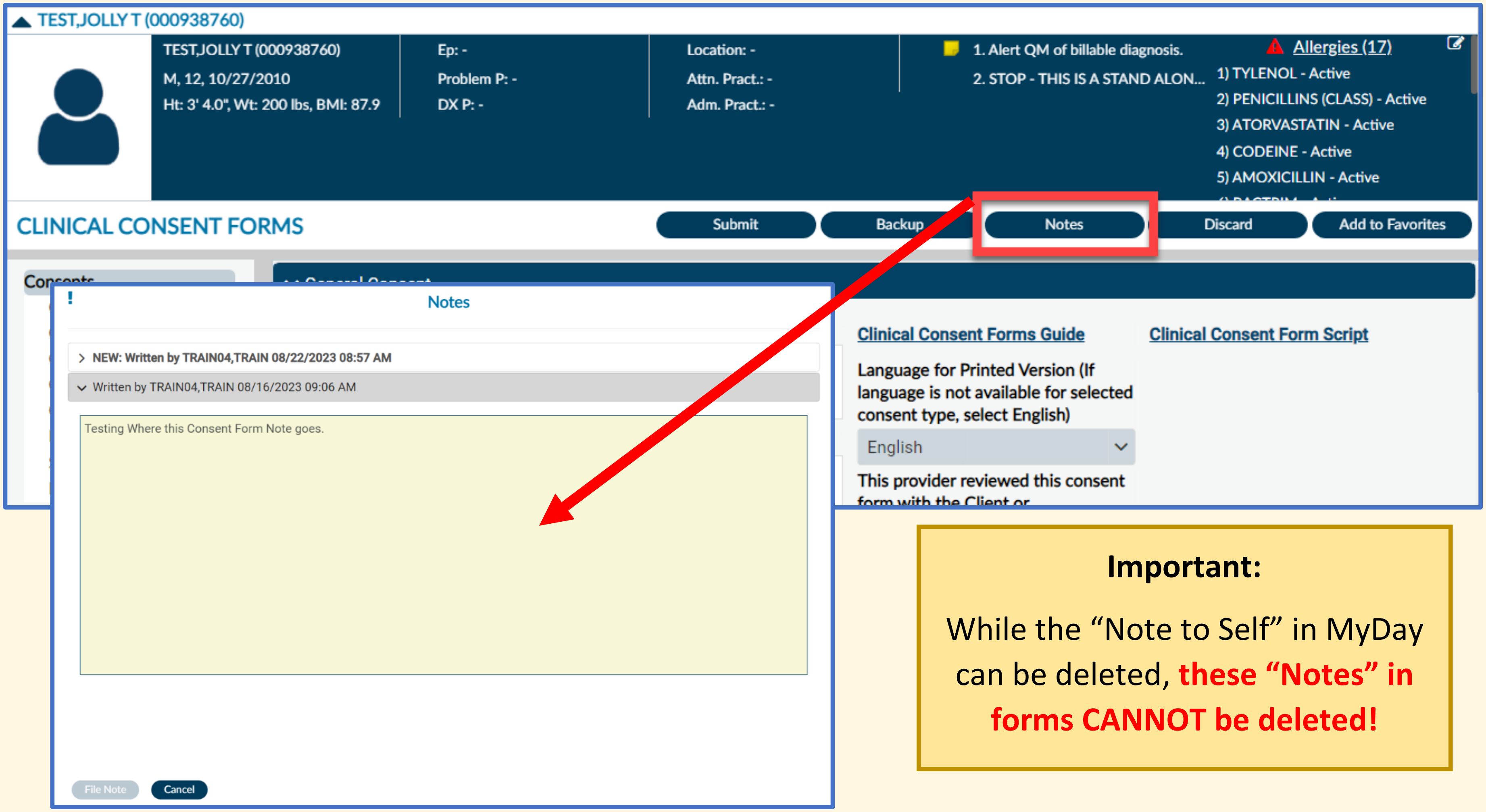
The “Note to Self” widget in the MyDay tab is available for you to write a note to yourself. Only you are able to see this note and you can add, edit, or remove the item yourself.





"Notes" in Forms

"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.



Important:

While the "Note to Self" in MyDay can be deleted, **these "Notes" in forms CANNOT be deleted!**

Section 9

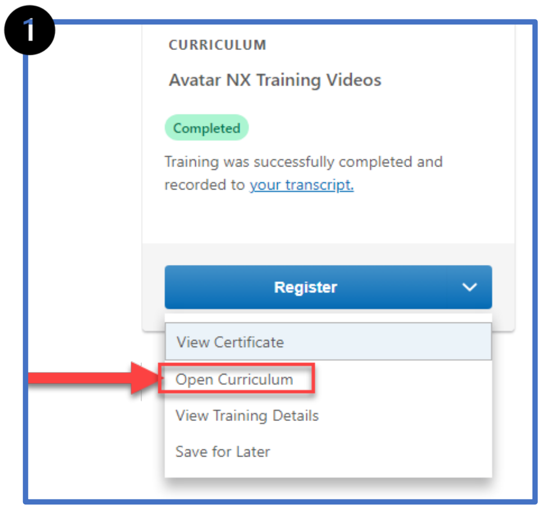
Avatar NX Resources

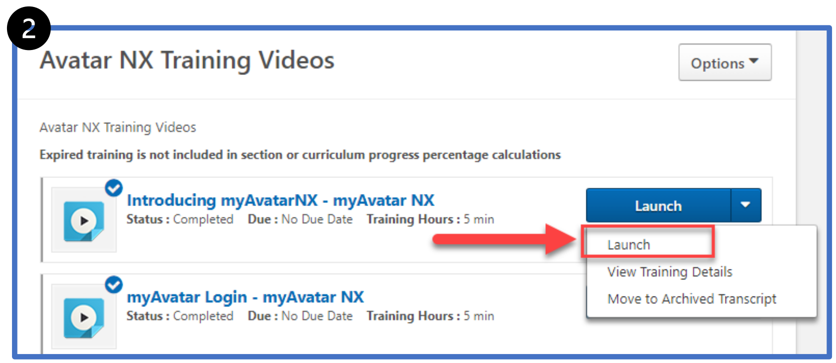
- Avatar NX Videos
- Need More Help with Avatar NX?
- BHRS Resources (Avatar NX and CalAIM)

Avatar NX Videos

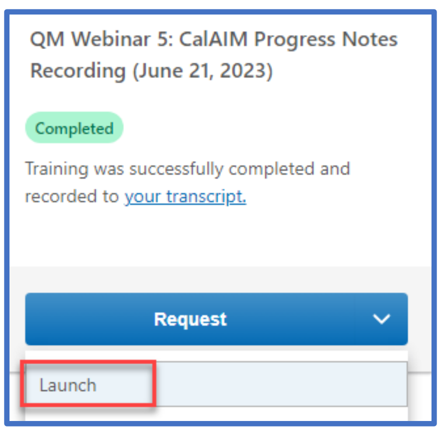
62. Re-watching the Avatar NX Videos I already completed

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.



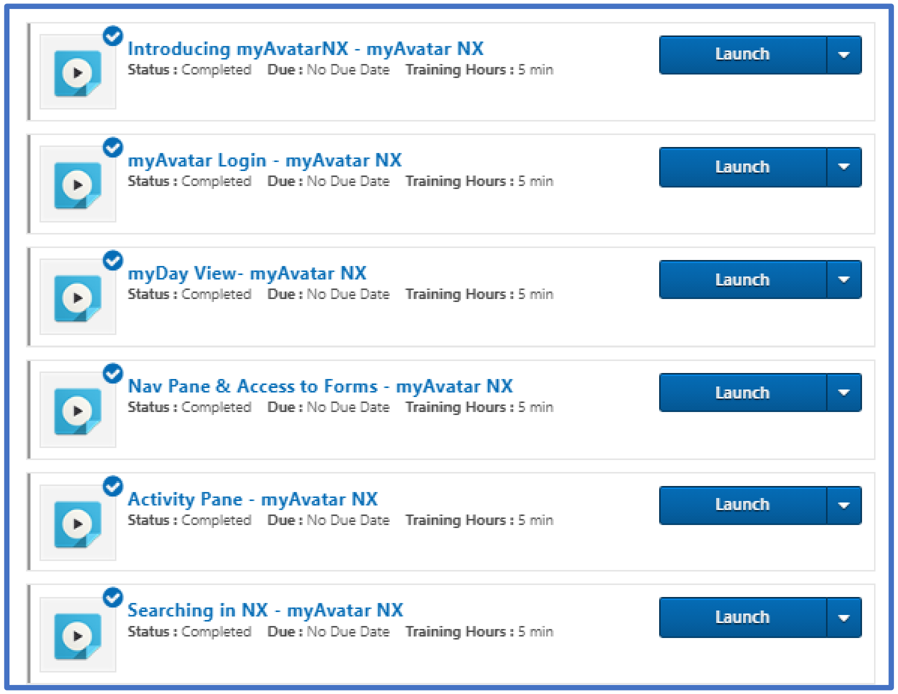


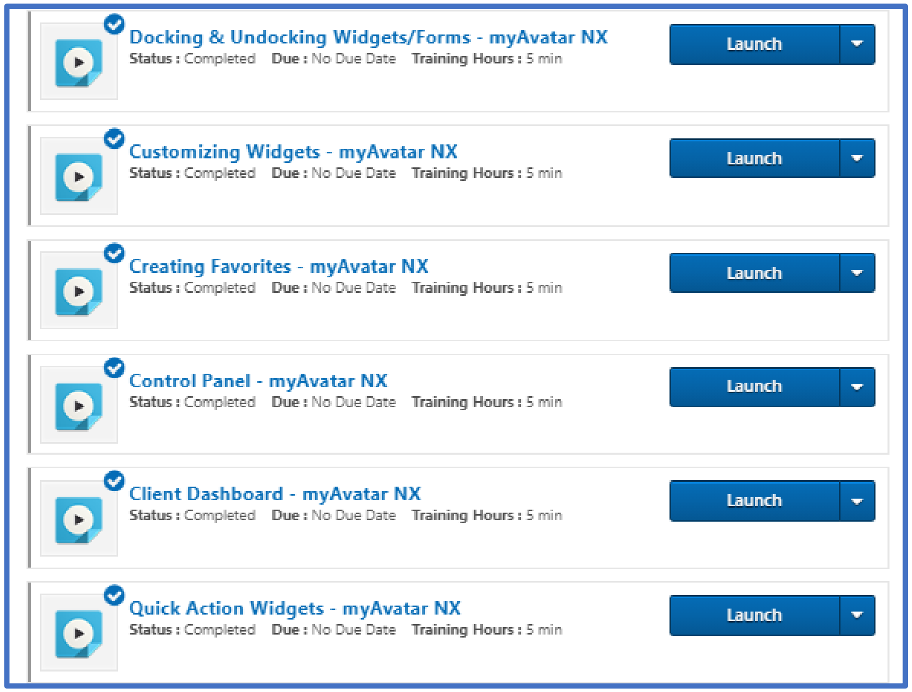
For some trainings, you can launch directly from the register screen because it is not part of a larger series of trainings (a.k.a. "curriculum").



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:** bhrs-it-support@smcgov.org **Call the ISD Help Desk:** (650) 573-3400
BHRS QM	**For General Questions, Email BHRS Ask QM:** HS_BHRS_ASK_QM@smcgov.org **For Troubleshooting LMS Access, Email BHRS QM:** HS_BHRS_QM@smcgov.org

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.

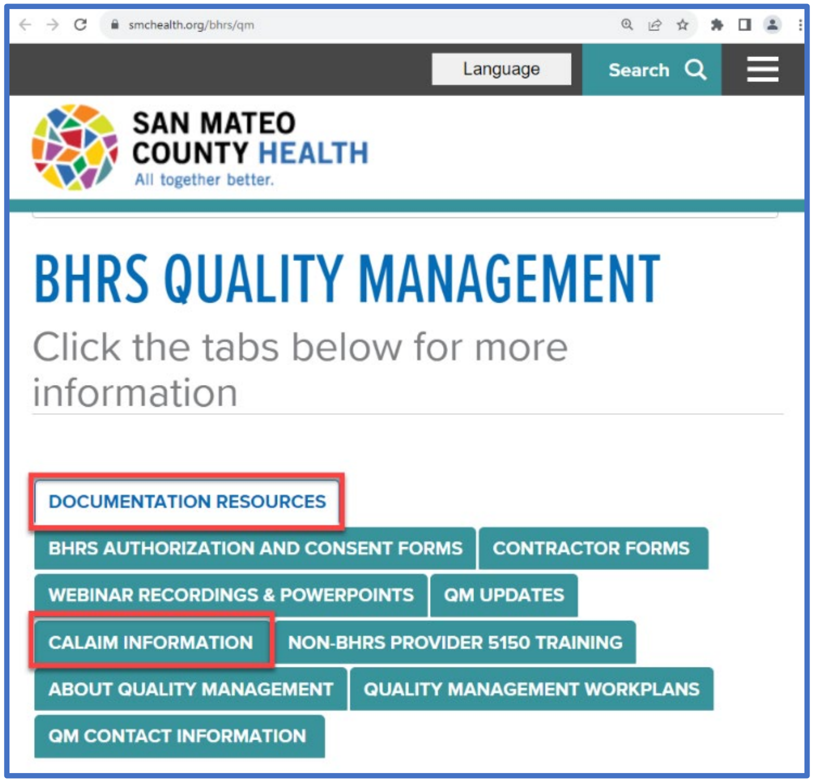
With the exception of password resets and other items specifically noted in this Avatar NX Updates document, all questions regarding Avatar NX should be sent to BHRS ASK QM (or BHRS QM if the issue is regarding your LMS account) QM will look into the issue and will let you know whether or not this issue 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 available on the BHRS QM Website 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 here.
   b. **Contract Agencies:** Click here. (Don't have an LMS account set up? Create an account by clicking here.)



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

1. **Avatar NX Updates and Tip Sheet** (Created 8/1/2023; Updated periodically)