




# CalAIM Assessment Workflow


## Completing a CalAIM Assessment

**Step 1:** Open your client's chart


**Step 2:** Search for the appropriate CalAIM Assessment Bundle


CalAIM Adult Assessment Bundle

 CalAIM Adult Assessment (12/16/24)

 Diagnosis Form

CalAIM Youth Assessment Bundle

 CalAIM Youth Assessment (12/16/24)

 Diagnosis Form

**Step 3:** Select the appropriate assessment subtype.

Initial	Initial SBMH	Initial PT3	Reassessment	Update
<ul style="list-style-type: none"> <li>• Use for all new clients at admission.</li> <li>• Can also be used for reassessments.</li> </ul>	<ul style="list-style-type: none"> <li>• Use only for new clients to the School-Based Mental Health Program</li> </ul>	<ul style="list-style-type: none"> <li>• Use only for new clients to the Pre To Three Program</li> </ul>	<ul style="list-style-type: none"> <li>• Use for reassessments for existing clients.</li> <li>• Use if making significant updates to a client's diagnosis.</li> </ul>	<ul style="list-style-type: none"> <li>• Use to make minor corrections or updates to an existing assessment.</li> <li>• Use to make updates to a client's diagnosis.</li> </ul>

**Step 4:** Complete all forms in the bundle. Use the Flow Charts in this document as a guide for steps to complete when completing an assessment or updating a diagnosis. Staff who require co-signature have additional steps that are indicated by instructions in an orange box.

Co-Signature steps are indicated by this box in the flow charts.



## Important Reminders

- ✓ While most staff can contribute to the assessment, **only authorized LPHAs may complete and finalize the assessment form.**
- ✓ Any assessments that were created in Avatar using the old V2 forms cannot be edited or finalized after 12/16/2024.
- ✓ PreCalAIM Assessments cannot be viewed using the Console Widget or Launch Report Feature. The **ONLY** way to view the PreCalAIM Assessments accurately is by running the “PreCalAIM” Assessment Reports. See [BHRS Avatar NX Updates and Tips](#) for more information.
- ✓ You **CAN** delete DRAFT versions of assessments that you created in error by following the instructions in [BHRS Avatar NX Updates and Tips](#).
- ✓ You **CANNOT** delete FINALIZED assessments. If you need to make a correction to an assessment, complete an “Update” Assessment.
- ✓ The assessment form should be completed at admission, and whenever it is clinically appropriate. Clients should be reassessed every three years to ensure that they continue to meet criteria for SMHS. At transfer or discharge, a reassessment or update assessment should be completed to document client’s functioning and reason for discharge or transfer.

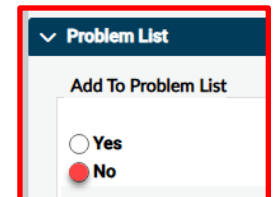
## Documentation Tips for the Assessment

- ✓ When adding information to an assessment (e.g., you are doing a reassessment and pre-populated information from the initial assessment) write **“The following information was added by [your name] on [date]”** before the new information that you add.
- ✓ Review the [BHRS CalAIM Assessment Webinar](#) and read the [BHRS Documentation Manual](#) for more information!

“The following information was added by [your name] on [date]”

## Known Issues Currently Being Worked On

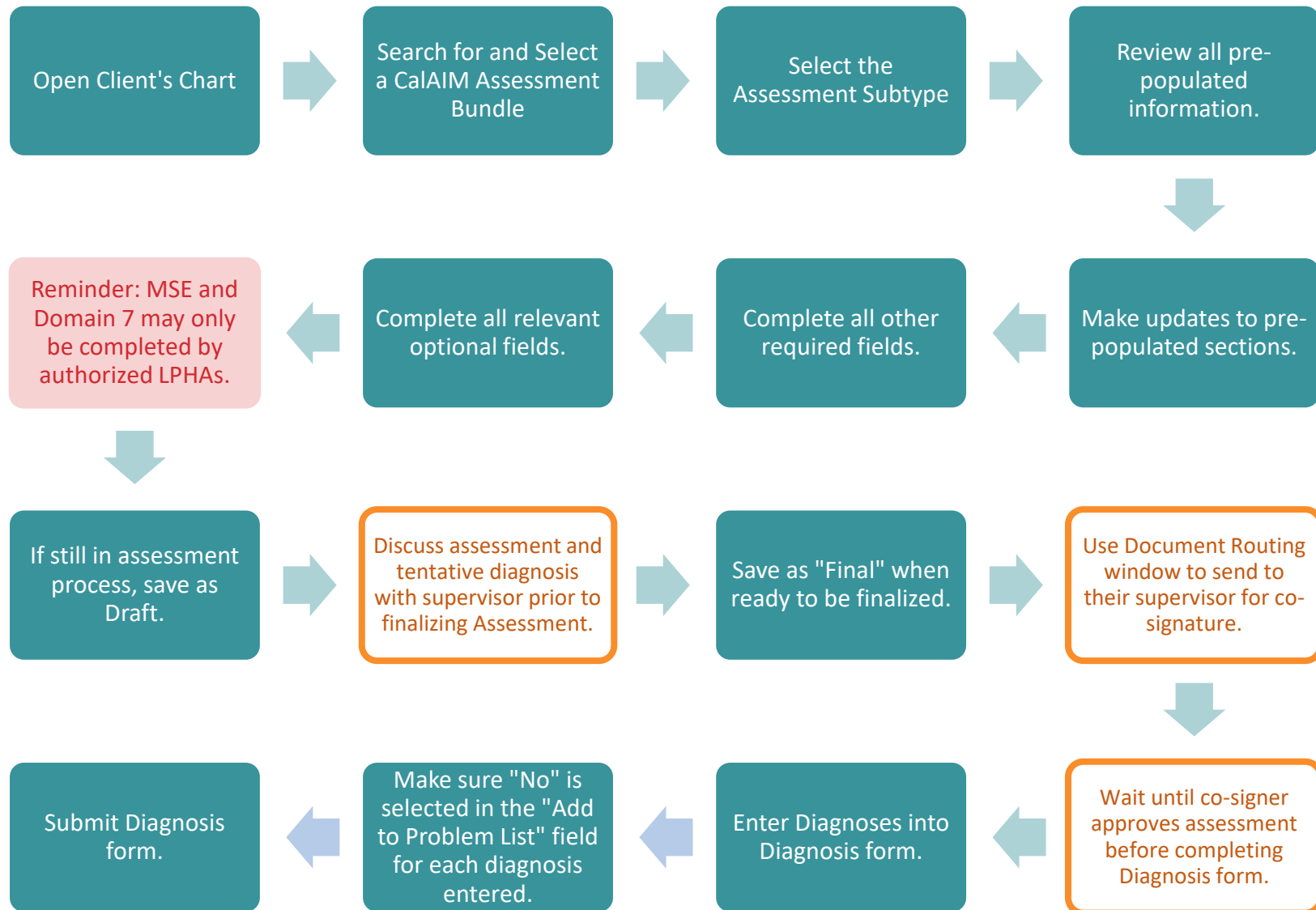
- ✓ **Assessment Form:** The **pre-population** feature for the new assessments is not functioning properly. Not all fields are pre-populating.
- ✓ **The Assessment Bundle is not showing up correctly in Avatar. Please fill out the CalAIM Assessment form and the Diagnosis form separately for the time being.** We will update staff as soon as the Assessment Bundle is available.
- ✓ **Diagnosis Form:** The Diagnosis form defaults to “Yes” for the “Add to Problem List” field at the bottom of the form. However, the system won’t allow you to submit if it’s marked yes. Our Avatar vendor is actively working to resolve this issue. Until the issue is resolved....
  - **Whenever you add a diagnosis, make sure that field is marked “No” for each diagnosis before submitting the form.**





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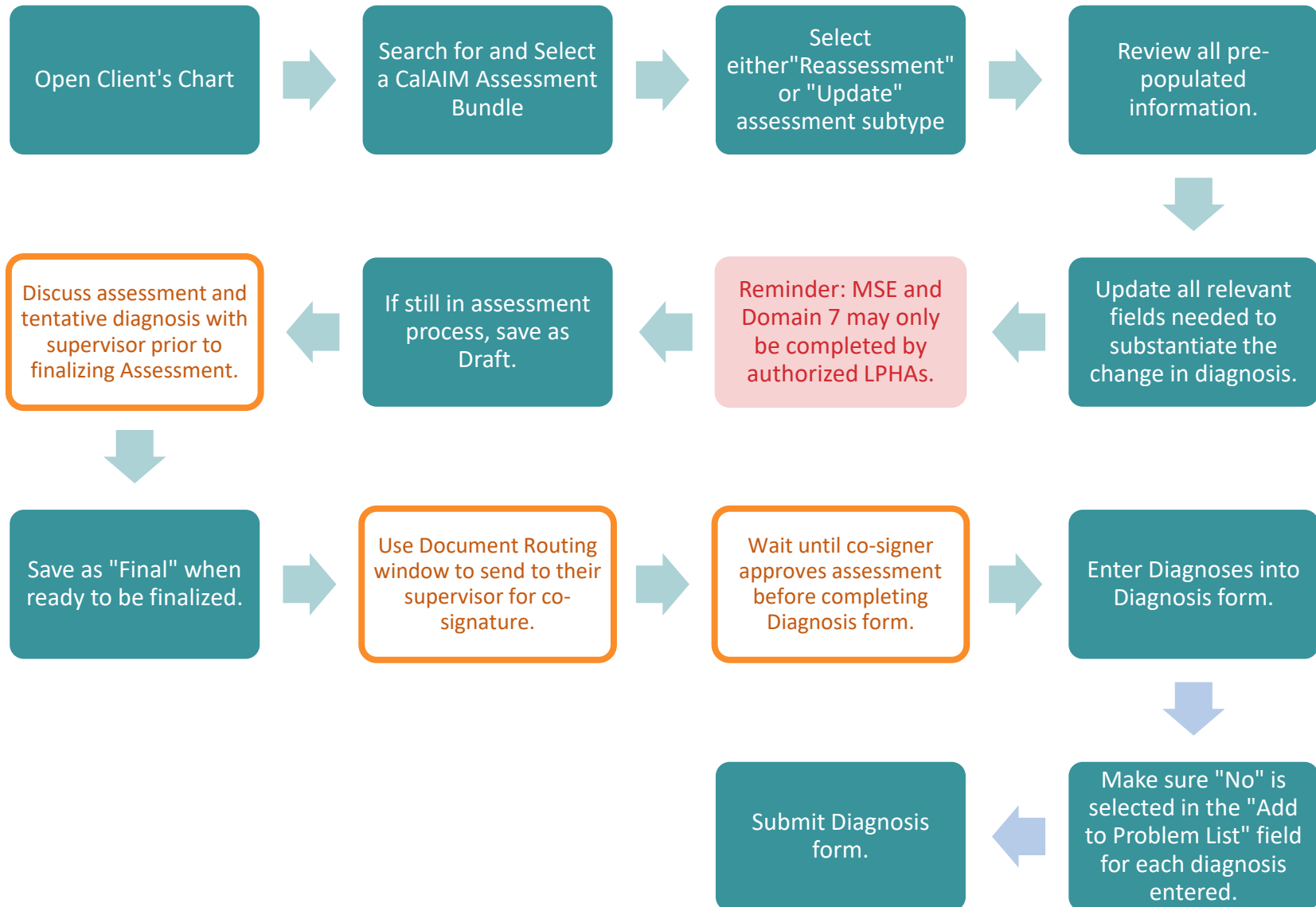
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## Updating Client's Diagnosis





SAN MATEO COUNTY HEALTH

**BEHAVIORAL HEALTH  
& RECOVERY SERVICES**

## CalAIM Assessment Workflow

### Resources

[BHRS Documentation Manual](#)

[BHRS Avatar NX Updates and Tips](#) (includes instructions on how to view PreCalAIM Assessments)

[BHRS Scope of Practice Matrix](#) (see who is authorized to finalize assessments)

[APA's DSM Website](#) (for list of MH Diagnoses and their ICD-10 codes, also includes Z-Codes)

[CMS Website for ICD-10](#) (ICD-10 Tabular contains the full list of diagnoses, including Z Codes)

[CalAIM Assessment Webinar PPT](#) (recording available in LMS)

[Additional Trainings Relevant for Assessments](#)

[Updated BHRS CalAIM Eligibility Tool for SMHS](#) (must email Ask QM for a copy)

If you prefer to jot down assessment information on paper before typing into Avatar, use the PDFs below!



CalAIM Adult  
Assessment PDF



CalAIM Youth  
Assessment PDF



CalAIM Pre-To-Three  
Supplement PDF