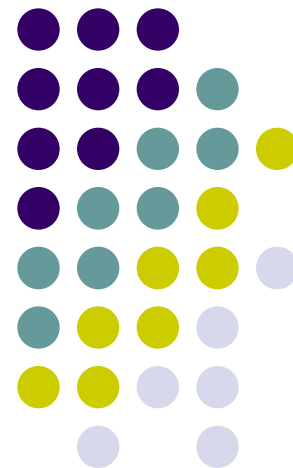# Reports and Scanning in Avatar

October 30, 2014 10:30 – 12:00 pm

Presented by Alys C. Herring

Today's Agenda

How to access Reports in Avatar:

What reports are available?

Management Reports vs Clinical Reports

How to run reports in Avatar

Importing Documents

What's needed in order to import into Avatar?

How to Import into Avatar

Update: Credentialing Form Submission

- When submitting Credentialing forms for Therapist/Billing Number please submit a printed copy of the NPI Number from the NPI website.

- The NPI taxonomy number needs to match the discipline selected on the Credentialing Form
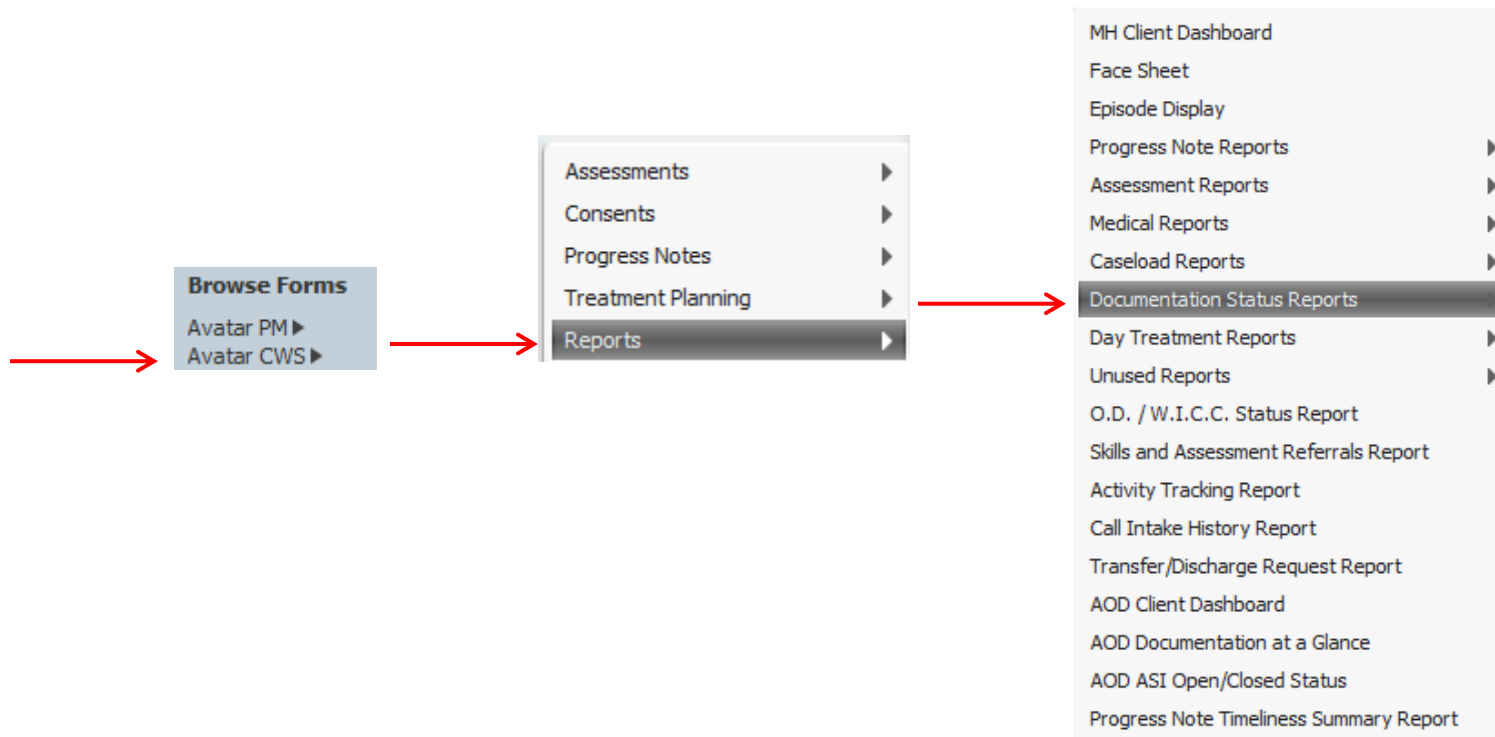
- Therapist Number Only
- Avatar Access

How to Access Reports in Avatar

- Reports are located in Avatar PM and CWS

Menu Path >Avatar PM > Reports /   **Menu Path >Avatar CWS > Reports /**

Browse Forms
Avatar PM ▶
Avatar CWS ▶

Assessments	▶
Consents	▶
Progress Notes	▶
Treatment Planning	▶
Reports	▶

MH Client Dashboard
Face Sheet
Episode Display
Progress Note Reports   ▶
Assessment Reports   ▶
Medical Reports   ▶
Caseload Reports   ▶
Documentation Status Reports
Day Treatment Reports   ▶
Unused Reports   ▶
O.D. / W.I.C.C. Status Report
Skills and Assessment Referrals Report
Activity Tracking Report
Call Intake History Report
Transfer/Discharge Request Report
AOD Client Dashboard
AOD Documentation at a Glance
AOD ASI Open/Closed Status
Progress Note Timeliness Summary Report

What Reports are Available?

A few of the reports available in Avatar. To see a full list log in Avatar to view under Reports in both PM & CWS

Avatar PM

1. BHRS TX Plan Audit
2. BHRS Episode Display
3. Program Census Report
4. BHRS Client Vitals
5. BHRS Units of Service by Program
6. Client Service Report

Avatar CWS

1. MH Client Dashboard
2. Progress Notes Report by Clinician
3. Documentation at a Glance
4. Assessment Overdue Status Report
5. Treatment Plan Overdue Status Report

Management Reports vs Clinical Reports

What's the difference?

Management Reports are reports Managers use to track Program/Agency Compliance

Clinical Reports are reports used in the clinical care of clients

Reporting Criteria

Reports use a variety of search criteria:

Program

Program
☐ 004200 CRESTWOOD REDDING IMD
☐ 004201 CRESTWOOD REDDING SNF AUGMENTATN
☐ 004300 CRESTWOOD SACRAMENTO
☐ 005800 LAUREL PARK
☐ 006600 SIERRA VISTA
☐ 007000 WESTWOOD MANOR

Start Date and End Date

Staff/Clinician

Start Date   End Date

Select
By Staff

Staff

Select
By Staff and Location

Staff & Location

Select Client
TEST,JOLLY (938760)

Client

Select Program

Print for Distribution to Staff?

No
Yes

Program w/wo Staff Distribution (printed to show individual Clinician's caseloads)

How to run a Report in Avatar

Select from Forms & Data widget >My Forms

Forms & Data
My Forms
Documentation At A Glance
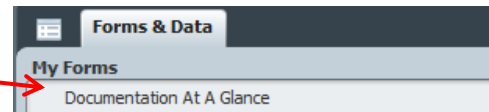
Click on the the name, report opens

Or 1. Search for a report by typing a partial name (e.g doc) in Browse Forms

doc

Browse Forms

Avatar PM ▶
Avatar CWS ▶
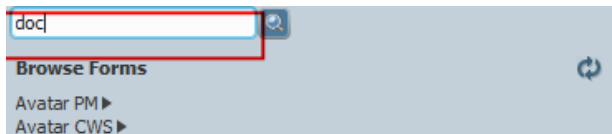
2.

Smart search will produce a list of forms matching what you typed. Once you select the form its highlighted (green), double click, the report opens

Name	Menu Path
Form Documentation	Avatar PM / RADplus Utilities / Modeling
Document Management Definition	Avatar PM / RADplus Utilities / Document Management
Clinical Document Viewer	Avatar PM / RADplus Utilities / Document Management
Delete Document	Avatar PM / RADplus Utilities / Document Management
Document Archiving	Avatar PM / RADplus Utilities / Document Management
Document Management Defaults	Avatar PM / RADplus Utilities / Document Management
Document Routing Setup	Avatar PM / RADplus Utilities / Document Routing
Append Documents	Avatar PM / RADplus Utilities / Document Routing
Review/Co-Sign Documents	Avatar PM / RADplus Utilities / Document Routing
60 Day Documentation Due	Avatar CWS / Reports / Documentation Status Reports
Documentation At A Glance	Avatar CWS / Reports / Documentation Status Reports
Annual Documentation Due	Avatar CWS / Reports / Documentation Status Reports
MH Documentation at a Glance by RRG	Avatar CWS / Reports / Documentation Status Reports
AOD Documentation at a Glance	Avatar CWS / Reports

<= Previous 25   1 through 22 of 22   Next 25 =>

doc

Browse Forms

Avatar PM ▶
Avatar CWS ▶

Running Reports

3.

Report Forms appears

4.

Enter the report criteria

Red is required
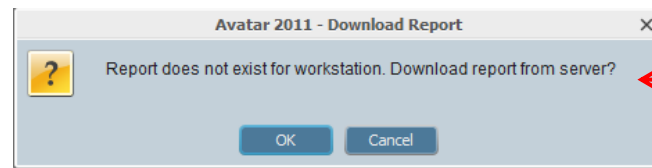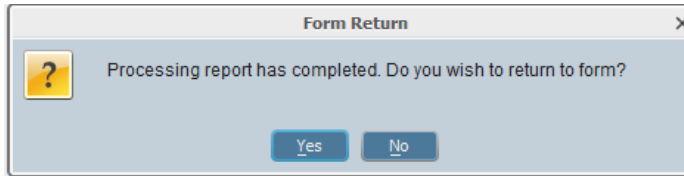
5a.

● If this is the first time the report has been run, it may ask to down load from server, select OK

5.

Press Process to run

6.

Do you wish to return to the form **(means do you want to run the report again)**

Running Reports

7.

Click to close report

Management Reports

Recommended Reports for Managers

1. [Documentation at a Glance](#)

2. [Assessment Overdue Status Report](#)

3. [Treatment Plan Overdue Status Report](#)

4. [BHRS Units of Service Summary By SF](#)

5. [MH Client Dashboard](#)

Management Reports

Documentation Status Reports

Menu Path>Avatar CWS>Reports>Documentation Status Reports

1. Assessment Overdue Status Report
2. Treatment Plan Overdue Status Report
3. Documentation At A Glance

Search Parameters: Program, Print for Staff Distribution

Select Program

004200 CRESTWOOD REDDING IMD
004201 CRESTWOOD REDDING SNF AUGMENTATN
004300 CRESTWOOD SACRAMENTO
005800 LAUREL PARK
006600 SIERRA VISTA
007000 WESTWOOD MANOR

Print for Distribution to Staff?

No
Yes

Management Reports

Service Reports

Menu Path>Avatar PM>Reports

Menu Path>Avatar PM>Reports>Service Reports

1. BHRS Units of Service Summary By SF
1. BHRS Units of Service Reports by Program
2. BHRS Unites of Service By Practitioner

Search Parameters: Program State Date, End Date , Program

Clinical Reports

1. MH Client Dashboard
2. Documentation at a Glance

Questions?
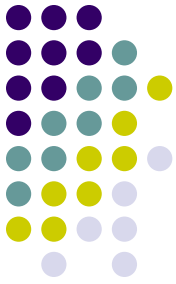
Viewing Progress Notes

The best way to view the Progress Notes in Avatar is through Chart View.

Search and Select the client, double click to open chart view

Chart View – Client

Viewing Progress Notes

Search for notes from Previous 365 days by changing default 30 days to 365. Click on note to refresh
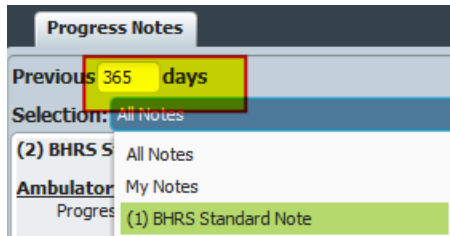
Displays all notes from past year

Progress Notes

Previous 365 days
Selection: All Notes
(2) BHRS S
All Notes
Ambulator My Notes
Progres (1) BHRS Standard Note

Highlights

Type of Note

Practitioner

Date of Service

Location

Services Provided

(1) BHRS Standard Note - 09/18/2014 by **INGALL BULL**

Day Treatment Daily Note

Progress Note For (Use New Service): New Service

Practitioner: BULL,INGALL (060050)

Week of Service (use Monday date): 09/15/2014

Date Of Service: 09/18/2014

Service Program (Do Not Change): 410101 NORTH COUNTY ADULT (410101)

Location: OFFICE

Service Charge Code (Only Use Day Treatment codes): PLAN DEVELOPMENT (6)

Service Duration (in minutes): 245

Services Provided Today: Other Family/Sig. Support Person Contact, Crisis Serivices, Adjunctive Therapy Group, Process Group, Family Psychotherapy, Therapeutic Milieu (Always Check)

Select T.P. Version: Client Treatment and Recovery Plan

Note Addresses Which Treatment Plan Problem:

    Treatment Plan Items-> Unable to maintain employment due to anxiety
    Treatment Plan Items-> Unable to maintain employment due to anxiety

Notes Field:

    Behavior/Goal addressed:

    Interventions:

    Response to interventions:

Note Type: (1) BHRS Standard Note

Viewing Assessments in Chart View

Chart View , Assessments can be accessed through Client Views

Client Views
1. MH Client Dashboard
2. ADULT Assessments v2 (All)
2. Youth Assessments v2 (All)   **← Click on the report to view**
3. Client Treatment Plan v2
4. Progress Notes
5. ADULT Assessments v1 (All)
5. CHILD/YOUTH Assessments V1
5. P.I.N. Assessments v1 (All)
5. PRE to 3 Assessments v1 (All)
Consent Tracking
Diagnosis

Adult Assessment v2

Questions?

Understanding Importing Documents into Avatar

Avatar provides Point of Service (POS) for scanning and importing. POS allows users to importing documents quickly and easily into Avatar.

Importing client-related documents into Avatar assures that key clinical information can be electronically shared throughout BHRS.
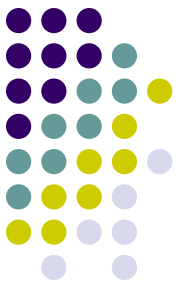
What's needed to Import/Scan

In order to import/scan into Avatar - Computers must have the following: AvatarPOS software installed either 32-bit or 64bit AvatarPOS.msi

2. Scanner or copier which has the ability to create PDF's.

It's recommended that a central folder be created to house the PDF's on a secure server due to the PHI.

Scanned copies of TX Plans and Assessments should not be left unsecure on laptops without Encryption software installed

Importing - Episodic vs Non-Episodic

Episodic - Only <u>Client Treatment Plans</u> are tied to a specific episodes. The episode must be identified when importing into Avatar.

All other documents are <u>Non-Episodic.</u>
(Assessments, Consents, Progress Notes, Other Correspondence)

Accessing POS Scan

- **Avatar CWS >Document Management >POS Scan / POS SCAN 64**

Assessments	▶	POS Scan
Consents	▶	Clinical Document Viewer
Progress Notes	▶	Document Management Definition
Treatment Planning	▶	POS SCAN 64
Reports	▶	Delete Document
Other Chart Entry	▶	Document Archiving
Contractor Document Entry	▶	Document Management Defaults
Document Management	▶	Electronic Signature Agreement
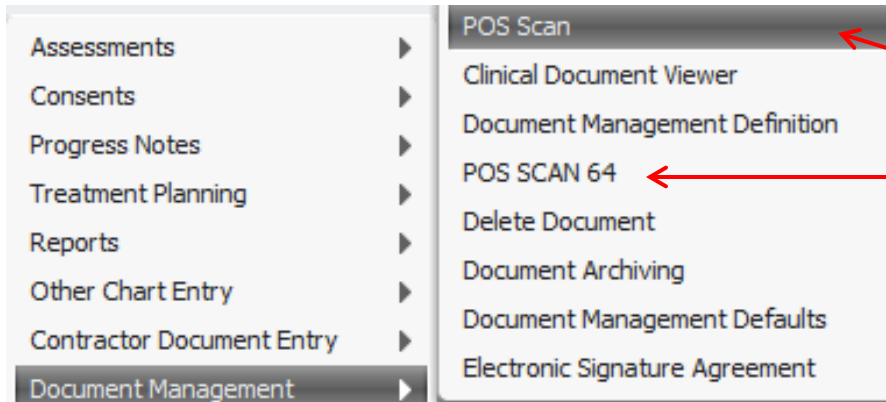
For 32-bit machines For 32-bit machines

For 64-bit machines

Avatar Document Imaging and Archiving

Initializing Avatar interface

Once you click on POS Scan, application opens

How to import into Avatar

A) Type — Select **Client** from Dropdown Menu

B) Client — Type the last name or MH number of the client whose record you are attaching the imported document to and tap **[Enter]** to select the full client name. If there is more than one client with the same last name, use the dropdown list to select the correct client.

C) Episode — Select the episode for **Client Treatment Plans ONLY. Select Non-Episodic** from the Episode field for all **OTHER** imported documents

D) Origination Date — The date listed on the Document

E) Form — Select the form that matches the Type of Document you are importing. Selecting the correct forms category is essential, this organizes the document and allows other to retrieve for future viewing.

F) Form — Click the import Button to begin importing the document. **Recommended document formats: PDF, TXT, DOC, DOCX**
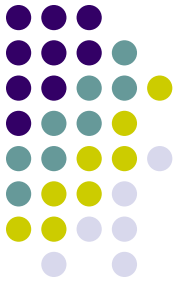
Importing into Avatar

- Once the import is complete, the document will display

Importing into Avatar

✓ Verify:

- Document(s) are readable
- All pages in the document are scanned
- Documents are imported to the correct client (check client id, name and birth date)
- An episode was selected for required for Client Treatment Plans
- The correct form title was selected for the document imported under "Document Description"
- The document is appropriately signed
- The origination date is correct under "Document date"

Once the document has been verified, Select , Save File to Avatar. If there is an error, Select, Close Document and re-import again.

Save File to Avatar
Close Document

Auditing Documents

Check List before importing in Avatar	
CLIENT ID UNDER THE "CLIENT ID" COLUMN	
THE CLIENT NAME UNDER THE "CLIENT NAME " COLUMN	
AN EPISODE NUMBER IS LISTED UNDER THE "EPISODE" COLUMN IF DOCUMENT is CLIENT TREATMENT PLAN	
THE CORRECT FORM TITLE WAS SELECTED UNDER THE "DOCUMENT DESCRIPTION" COLUMN	
THE ORIGINATION DATE IS CORRECT UNDER THE "DOCUMENT DATE" COLUMN	
DOCUMENTS ARE COMPLETE	
SIGNATURES ARE NOT MISSING	
SIGNATURES ARE LEGIBLE	
ORIGINATION DATES ARE NOT MISSING	
IMPORTED DOCUMENT FILES CAN BE OPENED AND VIEWED	
DOCUMENTS SCANNED ARE FOR THE CLIENT YOU ARE REVIEWING	
SCANNED DOCUMENTS ARE NOT DUPLICATED	
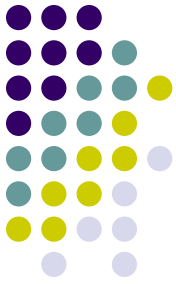
Viewing Documents in Avatar

View imported documents through Chart View.

Search and Select the client, double click to open chart view

Chart View – Client

Viewing Documents

Click on document name to view

Multiple Episodes

Form Name

Client Name   **Episode**   **Doc Desc.**   **Doc. Date**   **Doc. Status**   **User**
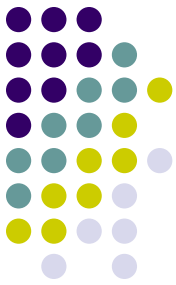
Viewing Documents

Check box to **View** or **Print**

At bottom of page click View, document will load

Document opens

You have the option to Print or Close All Documents

Close All Documents takes you back the original form you chose.

Questions?

Thank you