



County of San Mateo Avatar

DIAGNOSIS (ADMISSION) & UPDATE,
CONTRACTOR TX PLAN (INCLUDES
ASSESSMENT DATE & CONSENT TO TREATMENT
DATE), CSI ADMISSION, LOCUS &
CALOCUS,



Diagnosis (Admission)



WHEN IS THE FORM USED?

The Diagnosis is entered at **Admission**, **Discharge** and should be **Updated** if the Diagnosis changes after admission.



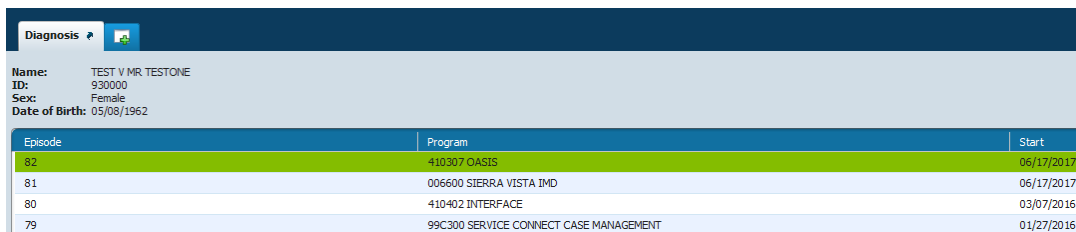
DIAGNOSIS (ADMISSION)

Entering an initial diagnosis: Menu Path > Avatar PM > Client Management > Client Information > Diagnosis or

Select from Forms & Data > My Forms

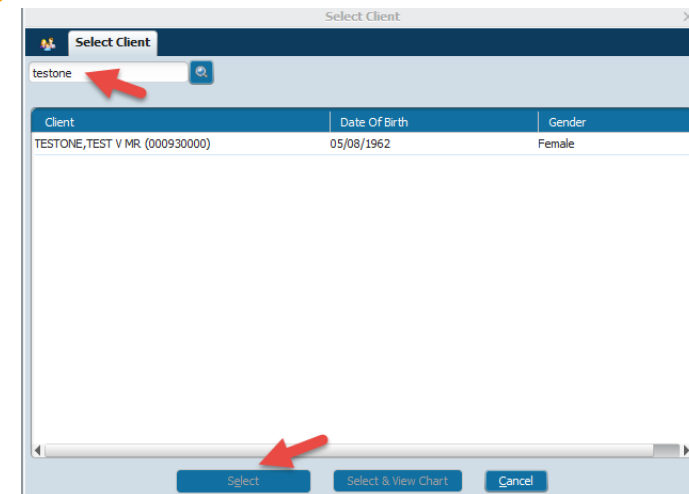


Select Client screen, enter the client ID in the Client Name/ID field, click the **Search** button, and select the corresponding entry.



A screenshot of the 'Diagnosis' screen. It displays client information: Name: TEST V MR TESTONE, ID: 930000, Sex: Female, Date of Birth: 05/08/1962. Below this is a table with columns 'Episode', 'Program', and 'Start'.

Episode	Program	Start
82	410307 OASIS	06/17/2017
81	006600 SIERRA VISTA IMD	06/17/2017
80	410402 INTERFACE	03/07/2016
79	99C300 SERVICE CONNECT CASE MANAGEMENT	01/27/2016



The Episode Selection pre-display shows if the client has multiple episodes. Select an episode, click **OK**.



DIAGNOSIS (ADMISSION)

The screenshot shows a medical diagnosis form with the following fields and callouts:

- 1. Type Of Diagnosis: Admission (selected), Discharge, Onset, Update
- 2. Date Of Diagnosis: 08/01/2017
- 3. Time Of Diagnosis: 02:34 PM, Current, H, M, AM/PM
- 4. Diagnosis Axis I table with columns: R, Description, Status, Estimated Onset, Classification, Resolved, Bill Order, ICD-9 Code, ICD-10. Row 1: (1) Bipolar 1 disorder, Active (1). Row 2: (2) Bipolar 1 disorder, Active (1).
- 5. Diagnosis Search field
- 6. Status: Active (selected), Working, Rule-out, Resolved, Void
- 7. Estimated Onset Date field
- 8. Resolved Date field
- 9. Diagnosing Practitioner field

1. In the **Type Of Diagnosis** field (**Admission**)
2. Selecting **Admission** or **Discharge** populates the client's admission or discharge date in the **Date of Diagnosis** field.
3. In the **Time Of Diagnosis** field, enter the diagnosis time.
4. In the **Diagnosis Axis I** field, click **New Row**. A blue row is added.
5. In the **Diagnosis Search** field, search for the diagnosis.
6. Select Status
7. Enter Estimated Onset Date (if necessary)
8. Enter Resolved date (if necessary)
9. Enter Diagnosing Practitioner
10. Select **"Submit"** to save the form.



Diagnosis Update & Discharge

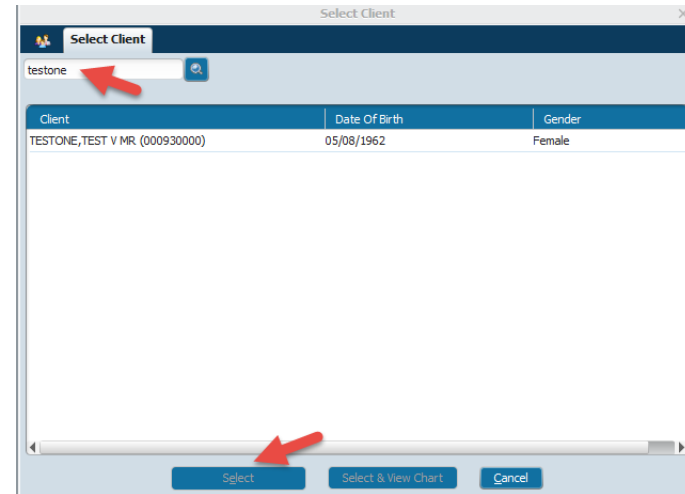


DIAGNOSIS (UPDATE)

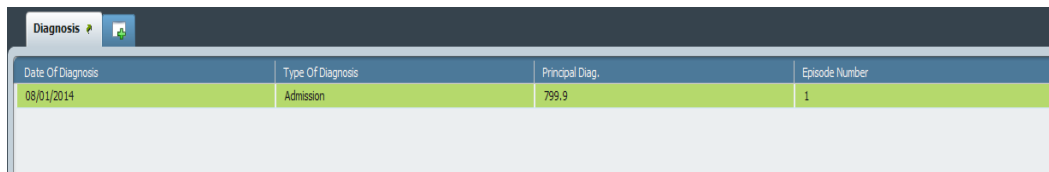
Select from Forms & Data > My Forms



Select Client screen, enter the client ID in the Client Name/ID field, click the **Select** button



The Diagnosis pre-display shows if the client has multiple entries.



A screenshot of a 'Diagnosis' pre-display table with the following data:

Date Of Diagnosis	Type Of Diagnosis	Principal Diag.	Episode Number
08/01/2014	Admission	799.9	1

Select **Add**



DIAGNOSIS (UPDATE)

The screenshot shows the 'Diagnosis' form in a medical software interface. The form is titled 'Diagnosis' and has a 'Submit' button. It contains several fields and a table. The fields are: 'Type Of Diagnosis' (with radio buttons for Admission, Discharge, Onset, and Update), 'Date Of Diagnosis' (with a date picker), 'Time Of Diagnosis' (with a time picker), 'Diagnosis Search' (with a search box), 'Status' (with radio buttons for Active, Working, Rule-out, and Resolved), 'Estimated Onset Date' (with a date picker), 'Resolved Date' (with a date picker), and 'Diagnosing Practitioner' (with a dropdown menu). The table has columns for 'R', 'Description', 'Status', 'Estimated Onset', 'Classification', 'Resolved', 'Bill Order', 'ICD-9 Code', and 'ICD-10'. There are two rows in the table, both with 'Active (1)' status. The form also has a 'Show Active Only' checkbox and a 'Code Crossmapping' section.

R	Description	Status	Estimated Onset	Classification	Resolved	Bill Order	ICD-9 Code	ICD-10
1	(1) Bipolar 1 disorder	Active (1)				1	296.7	F31.9
2		Active (1)				2		

1. In the **Type Of Diagnosis** field (**Update**) , select the diagnosis is associated with the client.
2. Selecting **Admission** or **Discharge** populates the client's admission or discharge date in the **Date of Diagnosis** field.
3. **Date of Diagnosis** field.
4. In the **Diagnosis Axis I** field, click **New Row**. A blue row is added.
5. In the **Diagnosis Search** field, search for the diagnosis.
6. Select **Status**
7. Enter **Estimated Onset Date** (if necessary)
8. Enter **Resolved date** (if necessary)
9. Enter **Diagnosing Practitioner**
10. Select **"Submit"** to save the form.



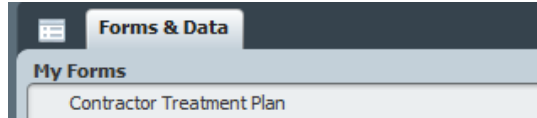
Contractor Treatment Plan

(Includes Entering the Assessment Date & Consent to Treatment Date)

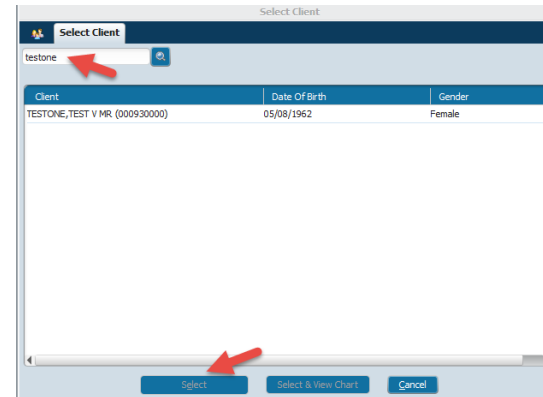


CONTRACTOR TREATMENT PLAN

Select from Forms & Data > My Forms



Select Client screen, enter the client ID in the Client Name/ID field, click the **Select** button

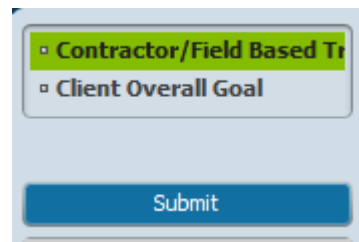


The Contractor/Field based Treatment Plan form has 2 sections

1. Contractor/field Based Treatment Plan



2. Client Overall Goal



CONTRACTOR TREATMENT PLAN

This Treatment Plan is for CONTRACTOR/FIELD BASED ENTRY ONLY

Plan Name **1**
test plan

Plan Type **2**
 Initial Plan Annual Plan Update Plan

Plan Dates

Plan Start Date (date of clinician signature) **3**
08/09/2018

Plan End Date **4**
08/08/2019

Documentation Compliance

Assessment Date
08/09/2018

Consent To Treatment Date

Treatment Plan For **5**
 Contractor
 BHRS-Field Based Client
 BHRS-Meds Only Client

Treatment Plan Status **6**
 Draft Final Pending Approval

Team Member To Notify

Last Updated

Last Updated By

Red=Required fields

1. Plan Name , (*Naming convention = Client's preferred Name, Type of Plan & Year*)
(example test plan)
2. Plan Type (Annual Plan, Initial Plan, Update Plan)
3. Plan Start Date (date of clinician signature).
4. Plan End Date (auto populates once the Plan Start is entered)
5. Treatment Plan For
6. Treatment Plan Status (Draft, Final, Pending Approval)



CONTRACTOR TREATMENT PLAN

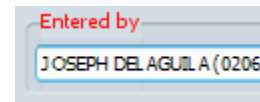
6. Type the (Client's Overall Goal – listed on paper Treatment Plan)



Client's Overall Goal

test

7. Entered by (auto populates & is based on user login)



Entered by

JOSEPH DEL AGUILA (02064)

8. Clinical Staff Responsible



Clinical Staff Responsible

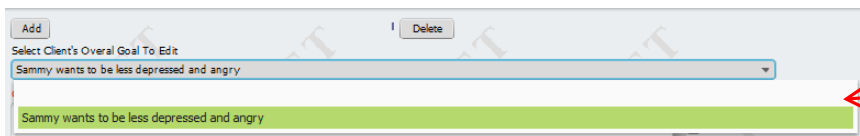
INGALL BULL (060050)

9. Select, Add – The goal disappears (not to worry)

10. Use chevron to select the goal



Client's Overall Goal



Add Delete

Select Client's Overall Goal To Edit

Sammy wants to be less depressed and angry

Sammy wants to be less depressed and angry

it appears in green on the dropdown list

11. Return to Contractor/Field Based Treatment Plan Section



ENTERING ASSESSMENT DATE & CONSENT TO TREATMENT DATE



Contractors who are also the Client's Care Coordinator should include the date when the client Assessment was completed

In the Documentation
Compliance section

The screenshot shows a form titled "Documentation Compliance" with two rows. The first row is labeled "Assessment Date" and contains an empty text input field, a small calendar icon, and three buttons labeled "T", "Y", and a date range icon. The second row is labeled "Consent To Treatment Date" and contains a similar set of elements: an empty text input field, a small calendar icon, and three buttons labeled "T", "Y", and a date range icon.

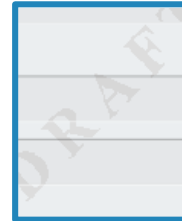
12. Enter date the Assessment was done

13. Enter Consent To Treatment Date



TREATMENT PLAN COMPLETION

14. If everything is complete, you can now change the status from Draft to **Final** (the Draft watermark disappears)



❖ You can submit the form in Draft status if changes need to be made later.

Forms left in Draft status will not be counted as having a up-to-date Tx Plan and services billed will not eligible to be paid.

This Treatment Plan is for CONTRACTOR/FIELD BASED ENTRY ONLY

Plan Name
test plan

Plan Type
 Initial Plan Annual Plan Update Plan

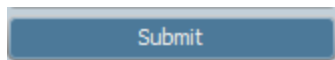
Plan Dates
Plan Start Date (date of clinician signature)
08/09/2018 [T] [Y] [Calendar icon]
Plan End Date
08/08/2019 [T] [Y] [Calendar icon]

Treatment Plan For
 Contractor
 BHRS-Field Based Client
 BHRS-Meds Only Client

Treatment Plan Status
 Draft
 Final
 Pending Approval

Team Member To Notify [Dropdown menu]

15. Click Submit to save

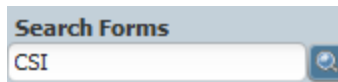


CSI ADMISSION



CSI ADMISSION

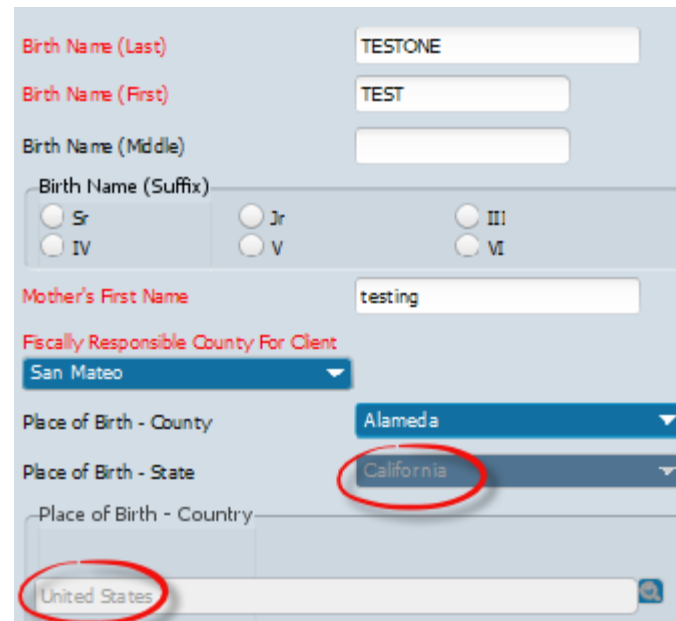
The CSI Admission form is part of the Admission Bundle (OUTPATIENT) or can be accessed from Forms & Data > My Forms or by Search Forms or



Search Forms
CSI

Name	Menu Path
CSI Admission	Avatar PM / Client Management / Client Information

1. Birth Name (Last)
2. Birth Name (First)
3. Birth Name (Middle)
4. Birth Name (Suffix)
5. Mother's First Name
6. Fiscally Responsible County
7. Place of Birth – County
8. Place of Birth – State
9. Place of Birth -Country



Birth Name (Last) TESTONE
Birth Name (First) TEST
Birth Name (Middle)
Birth Name (Suffix)
 Sr Jr III
 IV V VI
Mother's First Name testing
Fiscally Responsible County For Client San Mateo
Place of Birth - County Alameda
Place of Birth - State California
Place of Birth - Country United States

Once County is put in State and County auto populate



CSI ADMISSION

10. Ethnicity

11. Primary Language

12. Conservatorship/Court Status

CSI Ethnicity

Not Hispanic or Latino

Unknown / Not Reported

Hispanic or Latino

Primary Language

English

Conservatorship/Court Status

Temporary Conservatorship

Lanterman-Petris-Short

Murphy

Probate

PC 2974

Representative Payee Without Conservatorship

Juvenile Court, Dependent of the Court

Juvenile Court, Ward - Status Offender

Juvenile Court, Ward - Juvenile Offender

Not Applicable

Unknown/Not Reported

Race (Select Up To Five)

American Indian or Alaska Native

Asian Indian

Black or African American

Cambodian

Chinese

Special Population

(AB3632) Individualized education plan (IEP) required service(s)

No special population services

County School

Number of children less than 18 years of age that the client cares for / is responsible for at least 50% of the time

0

Number of dependent adults 18 years of age and above that the client cares for / is responsible for at least 50% of the time

0

13. Race (Select up to 5)

14. Special Population - If client is a child then County School should be selected from the drop down box.

15. Number of children less than 18 client is responsible at least 50% of time

16. Number of dependent adults client is responsible at least 50% of time

CSI ADMISSION


Legal Class (Inpatient ONLY) ▼

Admission Necessity Code (Inpatient ONLY)

Emergency

Planned (Prior Authorization)

Unknown/Not Reported

Year Or Month/Year Of Birth 


05/1962

This section is for inpatient (ONLY)



Light bulbs contain information about a particular field

Birth date carried over from Opening

Year Or Month/Year Of Birth 

CSI Data Ditionary "C-03.0 Date Of Birth" When the complete date of birth is unknown, as much of the date as is known s... Click

Click Submit to save

Submit



CONTRACTOR LOCUS & CALOCUS ENTRY

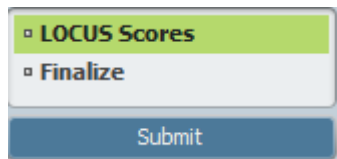


CONTRACTOR LOCUS ENTRY

The Contractor LOCUS & CALOCUS Entry forms or can be accessed from Forms & Data> My Forms or by Search Forms or [Avatar CWS/Contractor Document Entry](#)

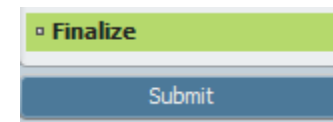
The Contractor LOCUS & CALOCUS Entry forms have 2 sections

1. LOCUS Scores



A screenshot of a web form section. It features a green header bar with the text "LOCUS Scores" and a sub-header bar with the text "Finalize". Below these bars is a blue button labeled "Submit".

2. Finalize



A screenshot of a web form section. It features a green header bar with the text "Finalize" and a blue button labeled "Submit" below it.

CONTRACTOR LOCUS ENTRY

LOCUS Scores Section

LOCUS Scores
 Finalize

Submit

Date Assessed: 07/11/2011

#1 - Risk of Harm
 1-Minimal Risk 2-Low risk 3-Moderate Risk 4-Seribus risk 5-Extreme Risk

#2 - Functional Status
 1-Minimal 2-Mild 3-Moderate 4-Seribus 5-Severe

#3 - Medical, Addictive and Psychiatric Co-Morbidity
 1-None 2-Minor 3-Significant 4-Major 5-Severe

#4a - Recovery Environment - Environmental Stressors
 1-Low Stress 2-Mildly 3-Moderately 4-Highly
 5-Extremely Stressful

#4b - Recovery Environment - Environmental Support
 1-Highly Supportive 2-Supportive 3-Limited 4-Minimal 5-No Support

#5 - Treatment and Recovery History
 1-Fuly 2-Significant 3-Moderate/Equivocal 4-Poor
 5-Negligible

#6 - Engagement
 1-Optimal 2-Positive 3-Limited 4-Minimal 5-Unengaged

1. Risk of Harm
2. Functional Status
3. Medical, Addictive and Psychiatric Co-Morbidity
- 4a. Recovery Environment – Stressors
- 4b. Recovery Environment – Support
5. Treatment and Recovery History
6. Engagement

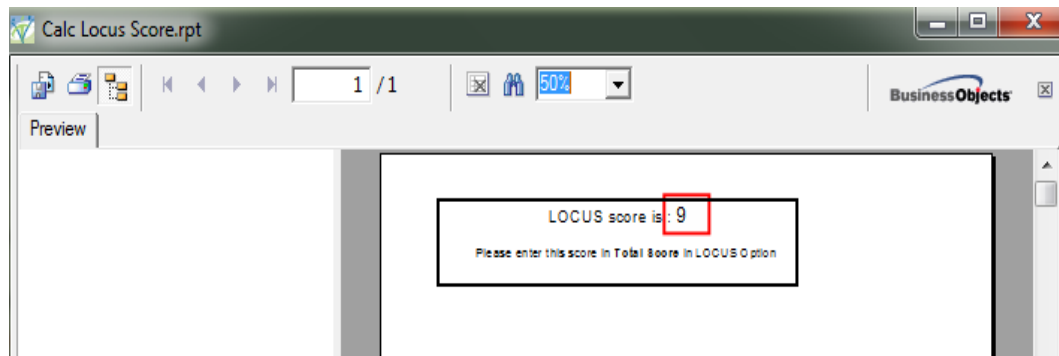


CONTRACTOR LOCUS ENTRY

Click, Calculate LOCUS Score

Calculate LOCUS Score

A crystal report will be generated showing the score



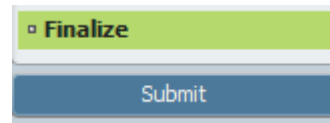
Once the score is shown, close by clicking on **close**

Place the score in the **Total Score** field

Total Score

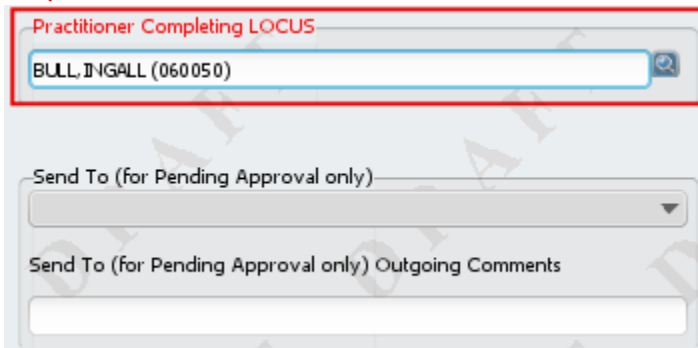
CONTRACTOR LOCUS ENTRY

Go to the Finalize Section



A green button labeled "Finalize" is positioned above a blue button labeled "Submit".

Input Practitioner Name



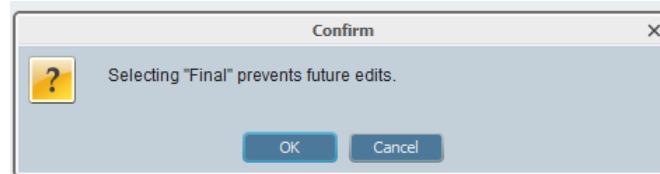
The "Practitioner Completing LOCUS" section contains a text input field with "BULL, INGALL (060050)" entered. Below the input field is a dropdown menu labeled "Send To (for Pending Approval only)" and a text area labeled "Send To (for Pending Approval only) Outgoing Comments".

Select Draft/Pending/Final Status



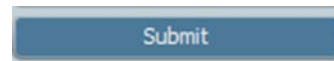
The status selection section has three radio buttons: "Draft", "Pending Approval", and "Final". The "Final" radio button is selected.

Selecting Final prevent edits



A "Confirm" dialog box with a question mark icon and the text "Selecting 'Final' prevents future edits." It has "OK" and "Cancel" buttons.

Click Submit to save



A blue button labeled "Submit".

CONTRACTOR CALOCUS ENTRY (FOR YOUTH)

LOCUS Scores Section

LOCUS Scores
 Finalize

Submit

Date Assessed

Is Youth Emancipated?

Date Assessed: 02/17/2011

Is Youth Emancipated?: No

#1 - Risk of Harm
 1-Low Risk 2-Some Risk 3-Significant Risk 4-Serious Risk 5-Extreme Risk

#2 - Functional Impairment-
 1-Minimal 2-Mild 3-Moderate 4-Serious 5-Severe

#3 - Co-morbidity -
 1-None 2-Minor 3-Significant 4-Major 5-Severe

#4a - Recovery Environment -Environmental Stressors
 1-Minimally Stressful 2-Mildly 3-Moderately 4-Highly 5-Extremely Stressful

#4b - Recovery Environment -Environmental Support
 1-Highly Supportive 2-Supportive 3-Limited 4-Minimally 5-No Support

#5 - Resiliency and Treatment History -
 1-Full 2-Significant 3-Moderate/Equivocal 4-Poor 5-Negligible

#6a - Treatment, Acceptance Engagement -Child/ Adolescent*
 1-Optimal 2-Constructive 3-Obstructive 4-Adversarial 5-Inaccessible

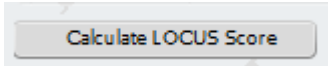
#6b - Treatment, Acceptance Engagement -Parent/Care-taker*
 0-N/A 1-Optimal 2-Constructive 3-Obstructive 4-Adversarial 5-Inaccessible

1. Risk of Harm
2. Functional Impairment
3. Co-morbidity
- 4a. Recovery Environment – Stressors
- 4b. Recovery Environment – Support
5. Resiliency and Treatment History
- 6a. Treatment, Acceptance Engagement – Child/Adolescent*
- 6b. Treatment, Acceptance Engagement – Parent/Care-taker*

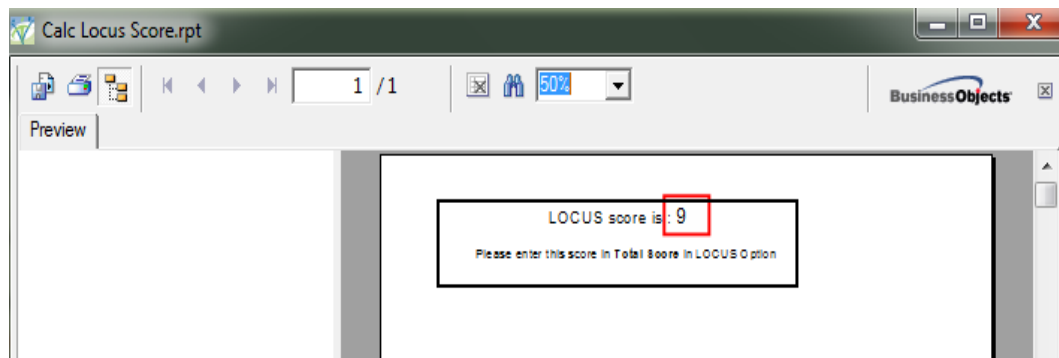


CONTRACTOR CALOCUS ENTRY

Click, Calculate LOCUS Score



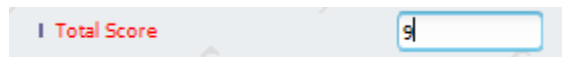
A crystal report will be generated showing the score



Once the score is shown, close by clicking on

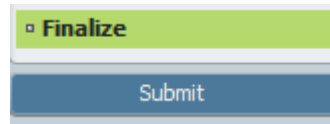


Place the score in the **Total Score** field



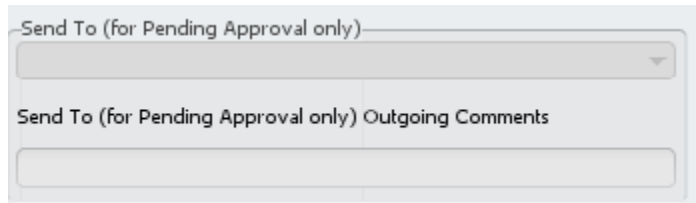
CONTRACTOR CALOCUS ENTRY

Go to the Finalize Section



A UI element with a green header bar containing the text "Finalize" and a blue button below it labeled "Submit".

Send to (for Pending Approval only)



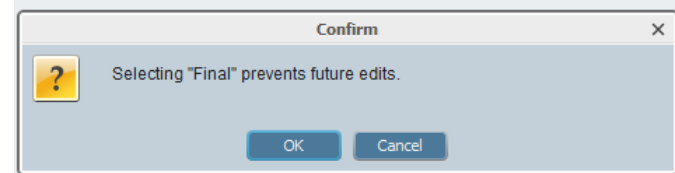
A dropdown menu with the text "Send To (for Pending Approval only)" above it. Below the dropdown is a label "Send To (for Pending Approval only) Outgoing Comments" and an empty text input field.

Select Draft/Pending/Final Status



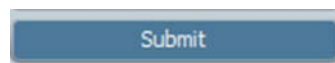
A UI element with the text "Draft/Pending Approval/Final" above three radio buttons. The "Final" radio button is selected, indicated by a green dot.

Selecting Final prevent edits



A "Confirm" dialog box with a question mark icon and the text "Selecting 'Final' prevents future edits." Below the text are "OK" and "Cancel" buttons.

Click Submit to save



A blue button labeled "Submit".

MISC

The question: What termination reason should an Agency use to discharge a client if they go AWOL?

Answer: If a client goes AWOL from a program, and is terminated in Avatar, the termination Program can use **Other** as the reason and explain in the discharge comments section.

Administrative Discharge is used in the AOD Programs not MH.

