Access Log (Avatar)

The purpose of this desk reference is to provide guidance in how to document a client through the process of the access log.

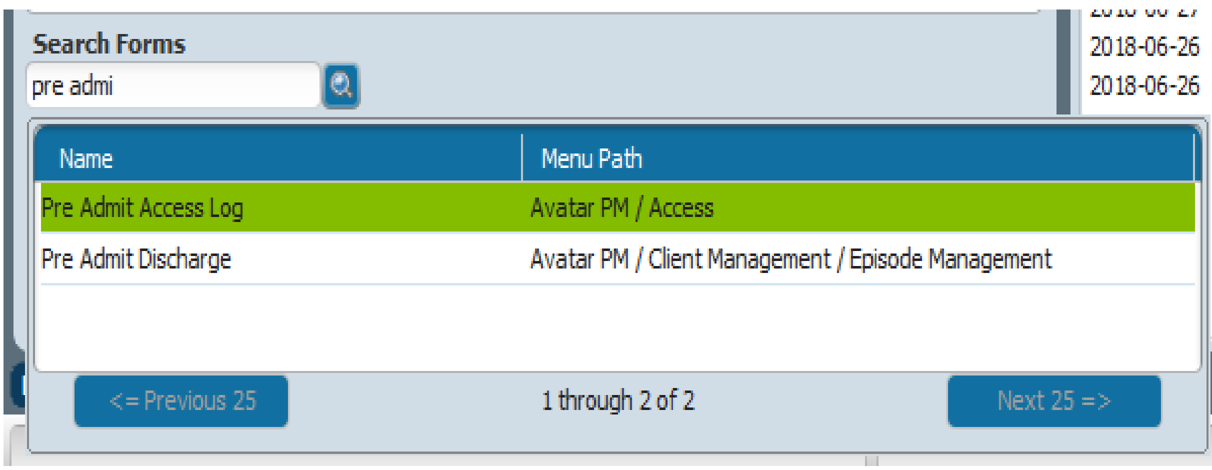
Heads Up!

- If you need to deselect an option, please place cursor in field that needs to be deselected and use the F5 button on your keyboard.

Pre Admit

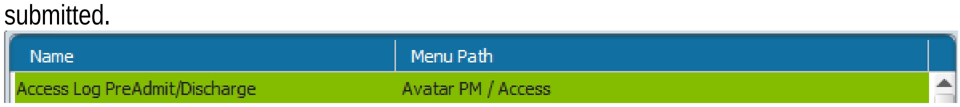
Menu Path

Avatar PM > Access > Pre Admit Access Log or you can enter “Pre Admit Access Log” under Search Forms



Heads Up!

- The Access Log PreAdmit/Discharge form can be used instead of the Pre Admit Access Log and Pre Admit Discharge. This form is a bundle and open the discharge as soon as the admit has been submitted.

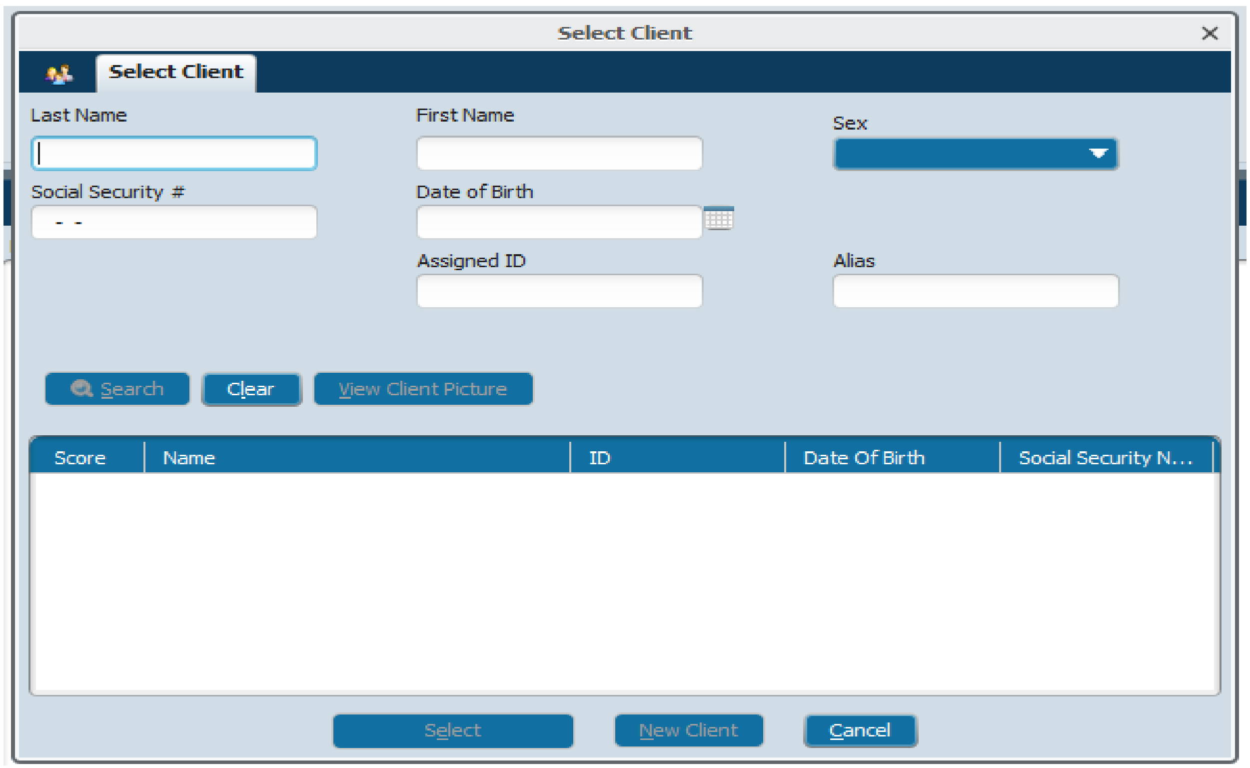


Details

- The Pre Admit Access Log is a required first step to initiate contact details.
- A Medical Record Number (MR#) will need to be generated for new clients or an existing MR# will need to be selected to create an Access Log entry.
- All contacts are required to be entered into the log.

Steps

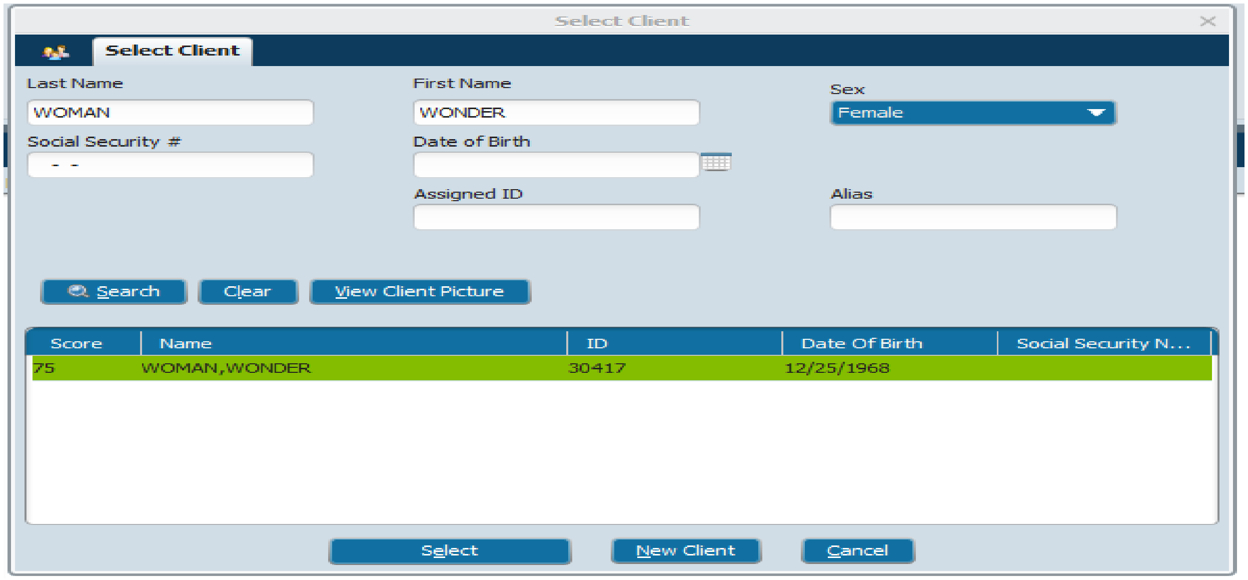
- Open the Pre Admit Access Log form. The below form will open.



- Enter the Last Name, First Name and Sex (as a minimum)

- Click on Search

- The system will provide you with the closet match if the client already exists in the system.

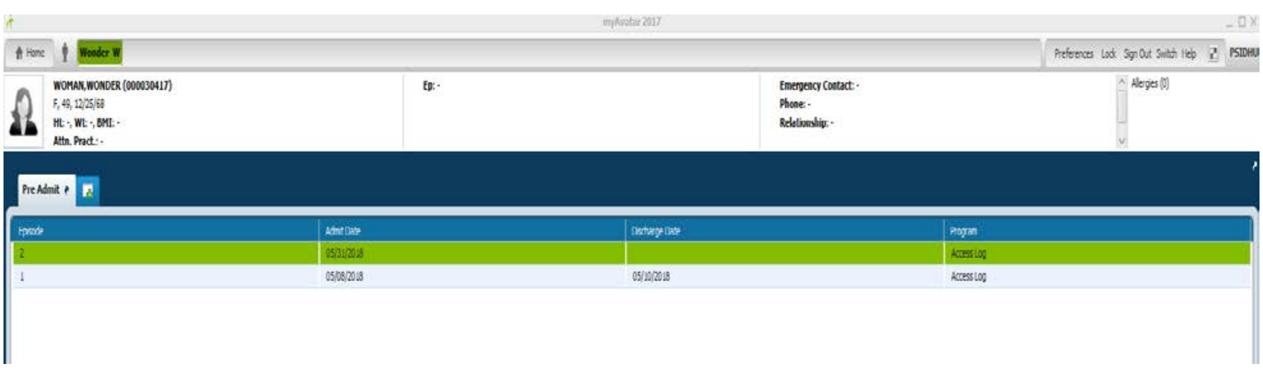


➢ Select the appropriate client

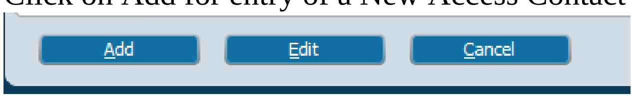
Heads Up!

- All CONTACTS need to be recorded, including wrong numbers. Wrong Numbers should NOT be captured within Avatar. This is required specifically for the ACCESS LINE ONLY.
- If a client is a Jane or John Doe and the name is Unknown, please use MR# 999999 or you can search for Unknown in the Last and First Name option.

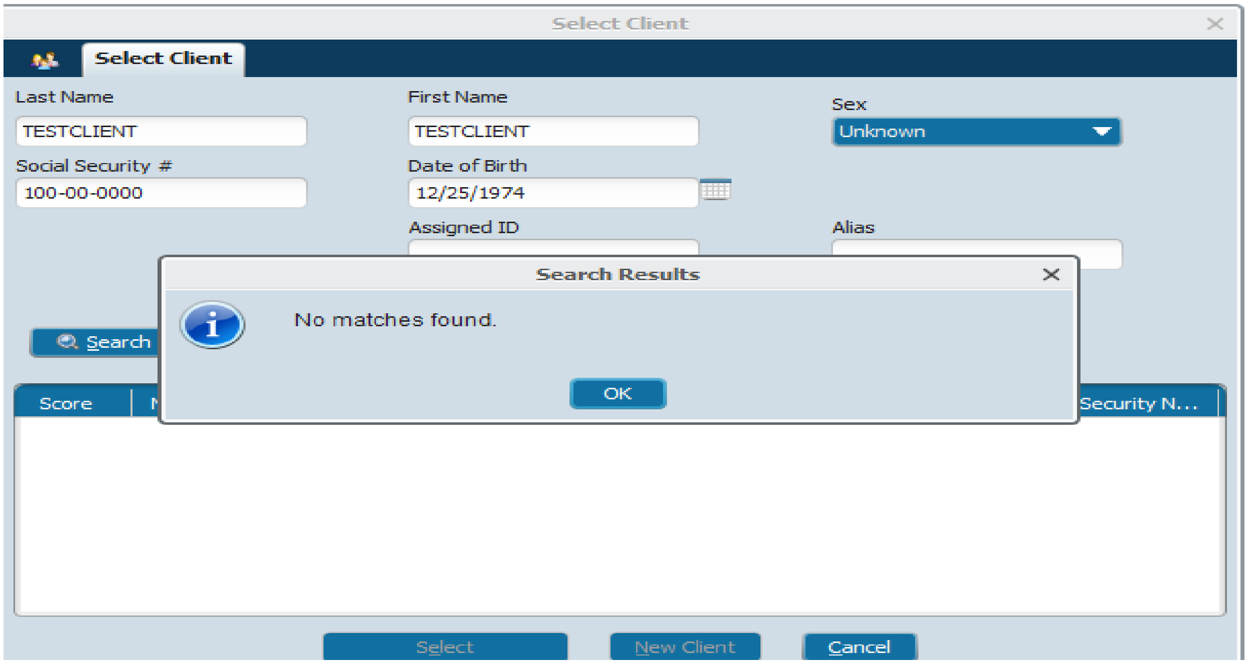
➢ A list of all the client's episodes will appear



➢ Click on Add for entry of a New Access Contact (bottom of form)

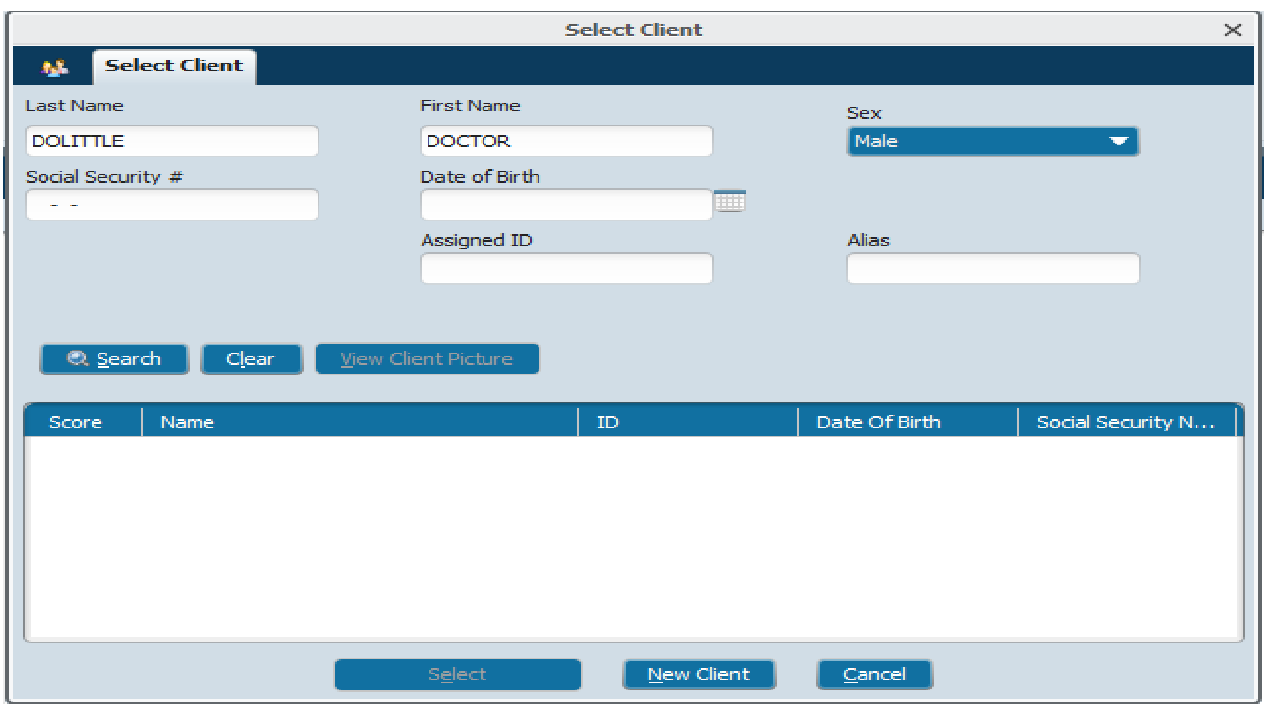


➢ Alternatively, if the client is new to the system, the below dialogue box will appear.

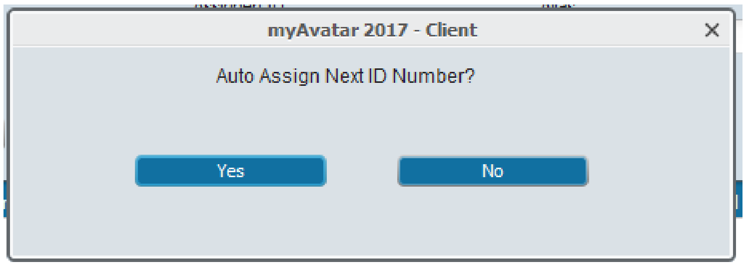


➢ Select OK

➢ Click on New Client



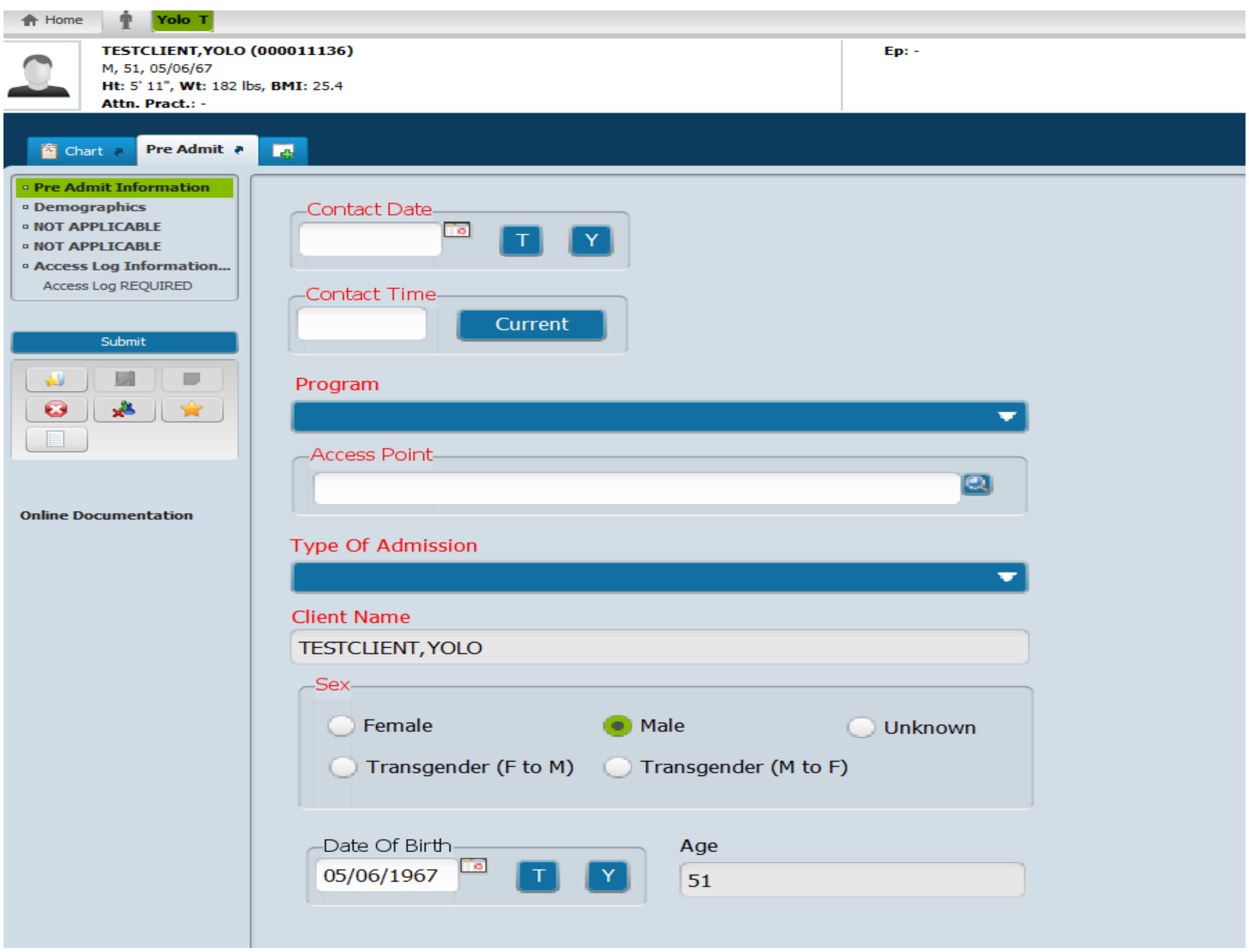
➢ A dialogue box will appear (as below)



- Select Yes to assign the Next ID number.
- The system will open the Pre Admit form for further entry

Heads Up!

- All RED fields are required fields and must be completed or the system will not allow you to move forward.



- In the Contact Date field, enter the date of contact or use 

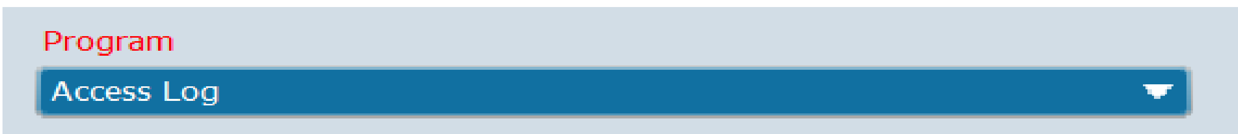
for Today's date or 

for Yesterday's date.

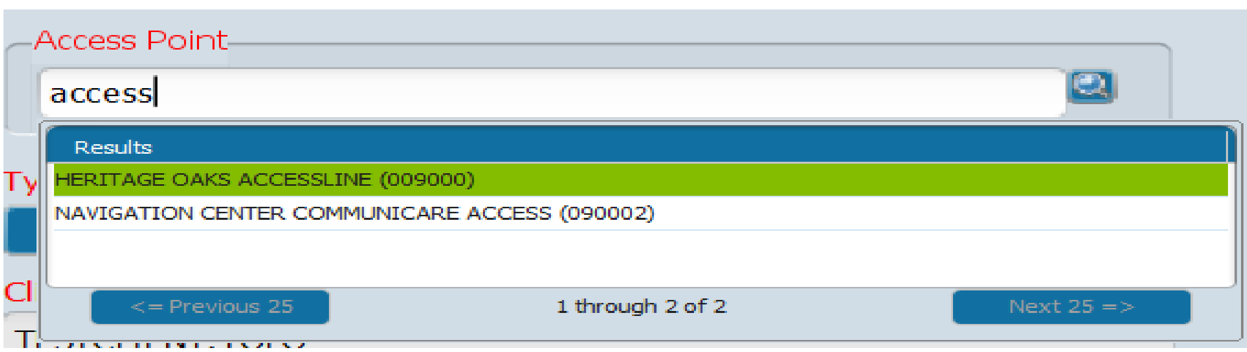
- In the Contact Time field enter the time of contact by clicking on 

or enter the time in Military time E.G. for 3pm enter 1500

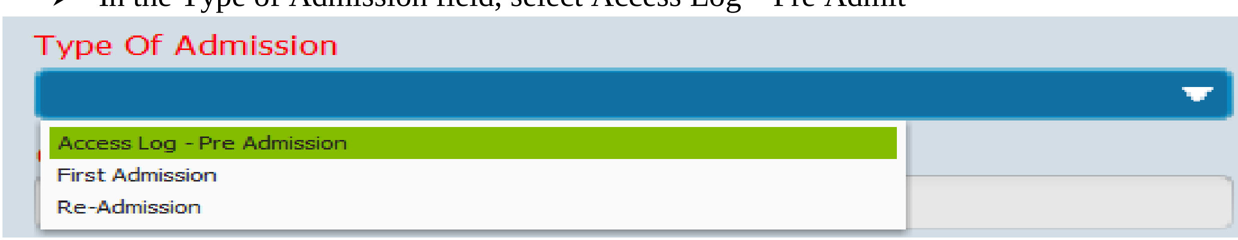
- In the Program field, select Access Log (as below)



- In the Access Point, enter your assigned Access Point # E.G. 9000 or enter Access and select the appropriate Access Point.



- In the Type of Admission field, select Access Log – Pre Admit



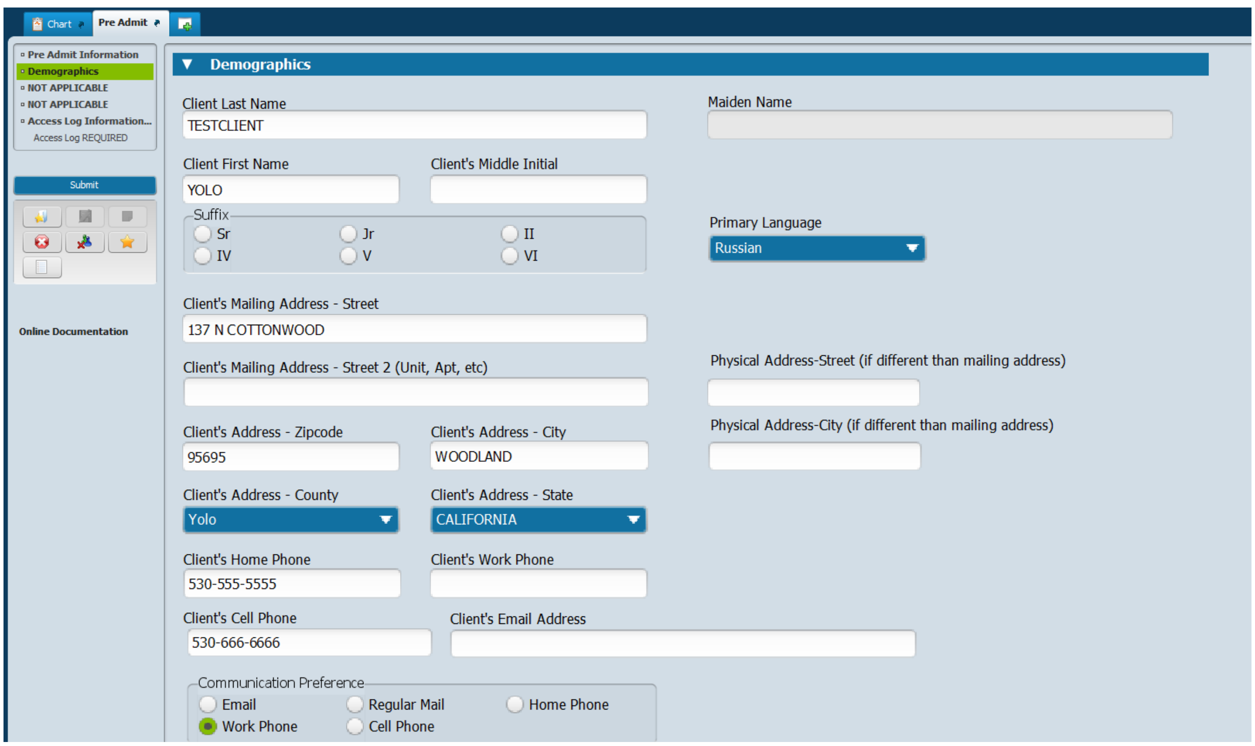
- In the Client Name field, the name that is associated with the MR# or was entered in the search screen will be populated.

- In the Sex field, the sex that is associated with the MR# or was entered in the search screen will be populated. Update this information if required.

- In the Date of Birth (DOB) field, the DOB that is associated with the MR# or was entered in the search screen will be populated.

- In the Age field, the system will auto generate the age of the client, based upon the DOB.

- Once complete select the Demographics tab, from the menu on the left



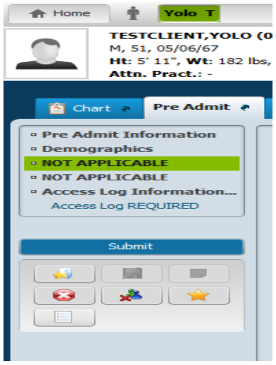
- The information entered in the search screen (for a new client) or existing information (for an existing client) will auto populate. Review the information and complete as much of the information that you can during your contact.

Heads Up!

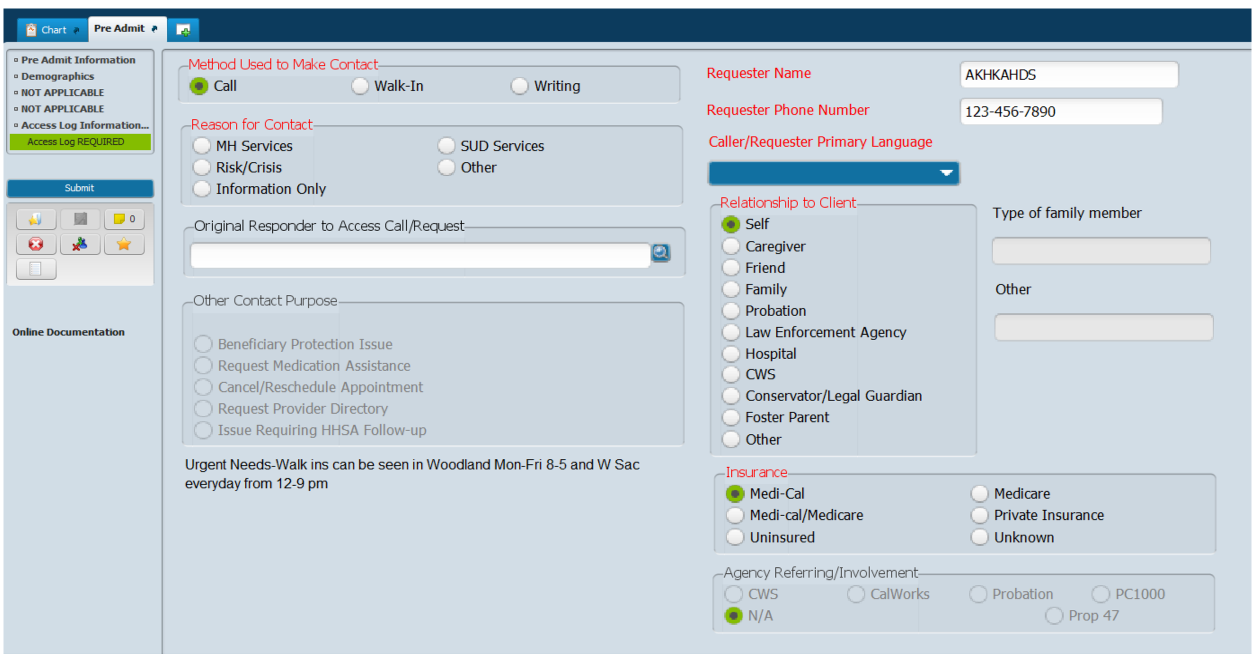
- There are no required fields in the demographic screen. However, it is good practice to document as much information as you can, regarding the client.

- The information collected in the demographics is specific to the Client and not the Requester

➢ The next two tab selections available on the left, are listed as Not Applicable. Ignore these choices.



➢ Select Access Log Information tab, from the menu on the left



➢ In the Method Used to Make Contact, select Call, Walk-in or Writing.

Heads Up!

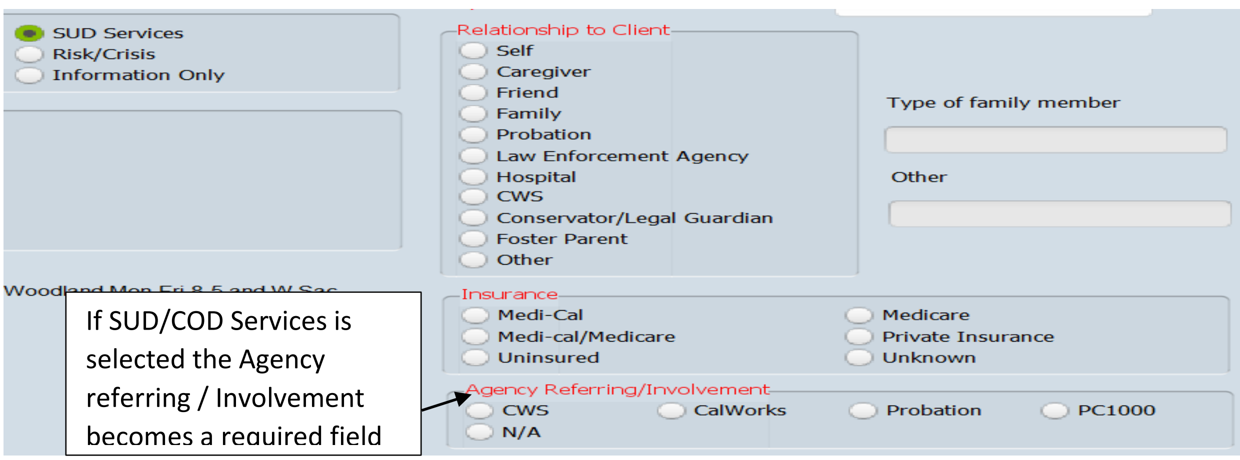
- Call in should be selected for any contact that is made via a phone
- Walk-In should be selected for any contact that is made via a direct contact. (Clients Walk-In's to an Access Point)
- Writing should be selected for any contact made via fax, referrals, emails or texts.

➢ In the Reason for Contact field, identify the purpose of the call.

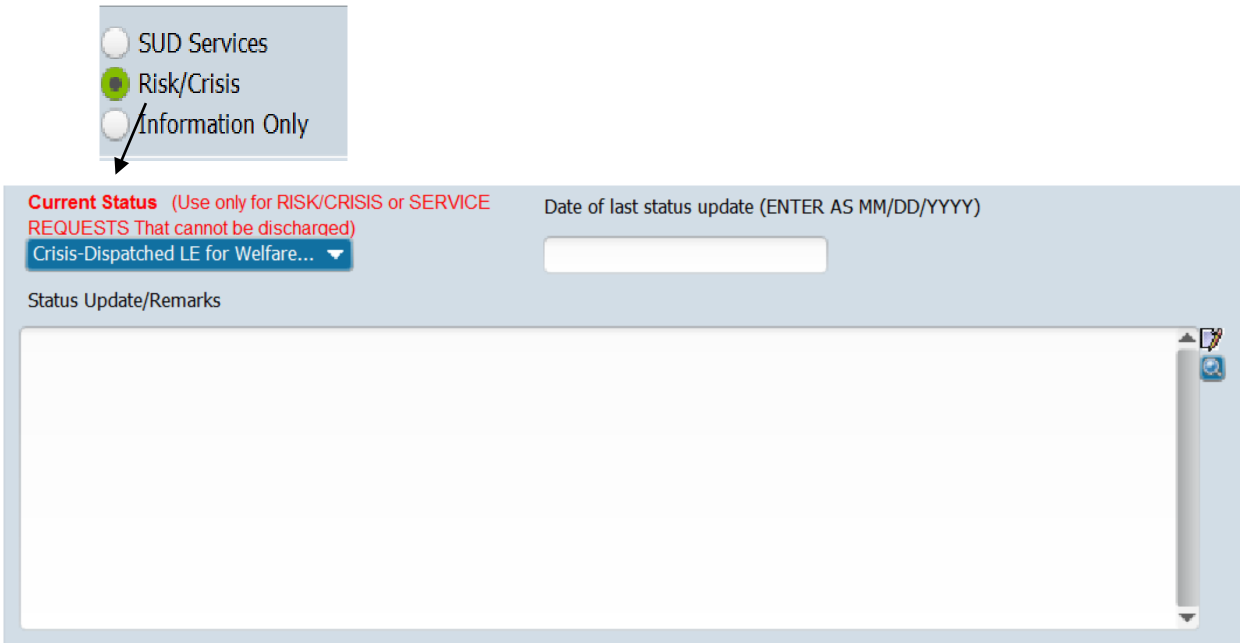
> Heads Up!
>
> - There are 5 choices for the purpose of the contact: Request for Mental Health Services (MH Services), Request for Substance Use Disorder Services (SUD Services), Risk/Crisis contact, Other and Information Only.
>
> - The system only allows you to make one selection; please select the main reason for contact.

➢ In the Original Responder to Call, please select your name, (Last Name,First Name) or you can enter your Practitioner ID# if you know it. The purpose of this field is to capture who recorded the contact, in the event of any follow up questions.

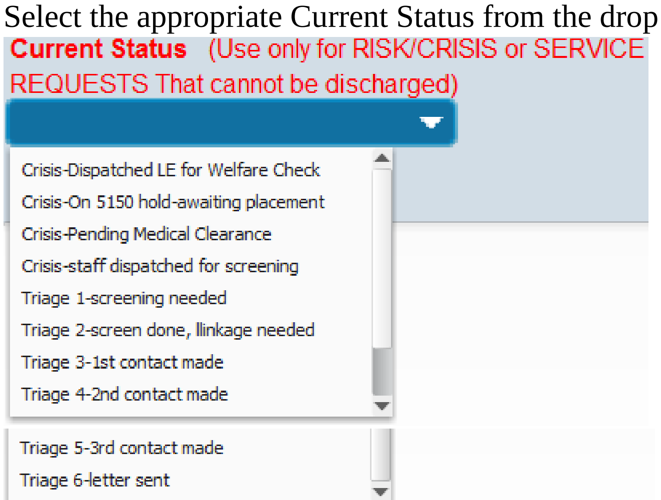
➢ If SUD Services is selected as the Reason of the Contact, then the fields Agency Referring/Involvement will become a required field. This information is self-reported by the client. If the client does not know if they are involved in the listed agency's or the requestor does not have this information available, then select N/A.



➢ If Risk/Crisis is selected, then the field Current Status (Use only for RISK/CRISIS or SERVICE REQUESTS that cannot be discharged) will become a required field.



- Select the appropriate Current Status from the drop down menu



- If Reason for Contact is MH Services or SUD Services, Select the appropriate drop down item.

Heads Up!

- The Status Update/Remarks and Current Status (Use only for RISK/CRISIS or SERVICE REQUESTS that cannot be discharged) can and should be updated and changed at any time during the course of resolving the Access Contact.

- The Date of last status update (ENTER AS MM/DD/YYYY) field should be updated to the last date that an update to this contact was made.

- The Status Update/Remarks field is a free text box, where any information should be entered.

Heads Up!

- When a client is experiencing a Crisis or Risk, the Access Log cannot be discharged until there is a resolution; client has been de-escalated and is out of crisis, Crisis Clinician has been dispatched etc.

- In the event, that the client did not complete screenings or no one was available to triage the client; do not discharge the client. Instead, use the Current Status (Use only for RISK/CRISIS or SERVICE REQUESTS that cannot be discharged) should be completed with the appropriate status.

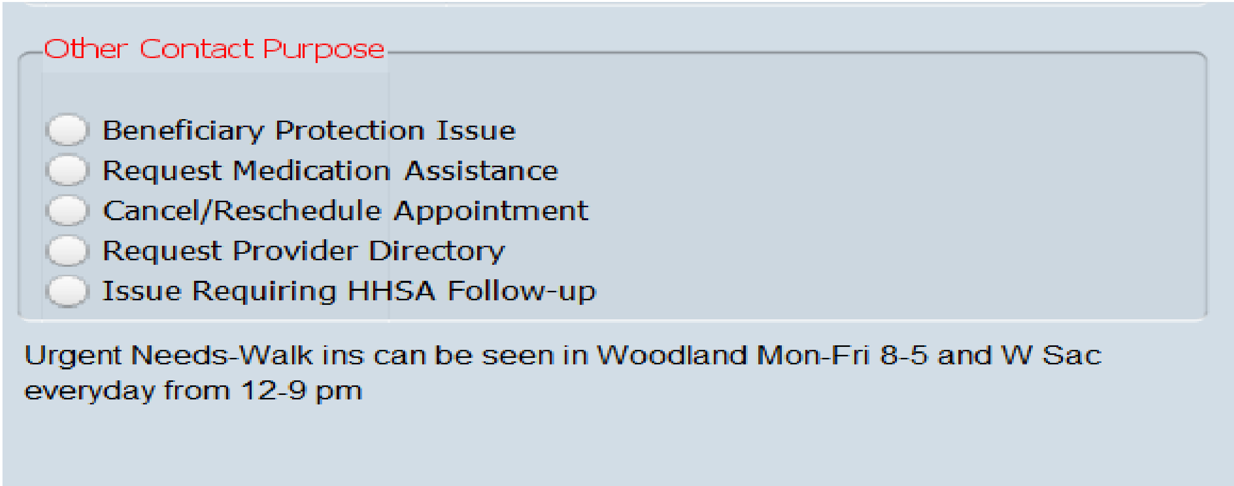
- If a discharge has not been completed, it is indicative that there is a required follow-up that needs to happen. The Access-Requests Pending Discharge Widget should be reviewed as a minimum at every shift change.

- This section should be used to track what is happening with the client and other pertinent information.

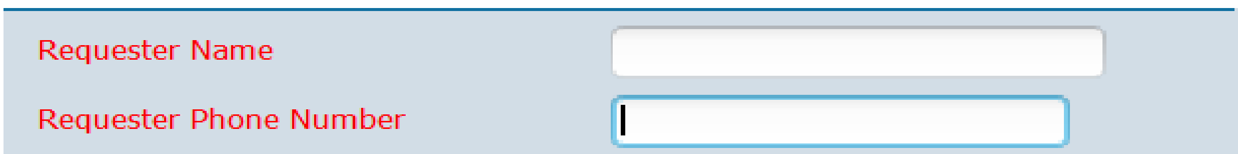
- When writing in the text field, text should meet the following guidelines
  - Date of Status
  - Time of Status
  - Clinician Name
  - Update
  - Documentation should be in CAPS

Example: 04/01/2018 3PM ERIC BANNER - CLIENT IS STILL ON HOLD AND IS WAITING ADMISSION. WILL TRANSFER CASE TO HHSA CLINICIAN.

- If Other is selected, then the field Other Contact Purpose will become a required field.



➢ In the Other Contact Purpose field, select the purpose of the call.



➢ In the Requestor Name, enter the name of the person making contact.

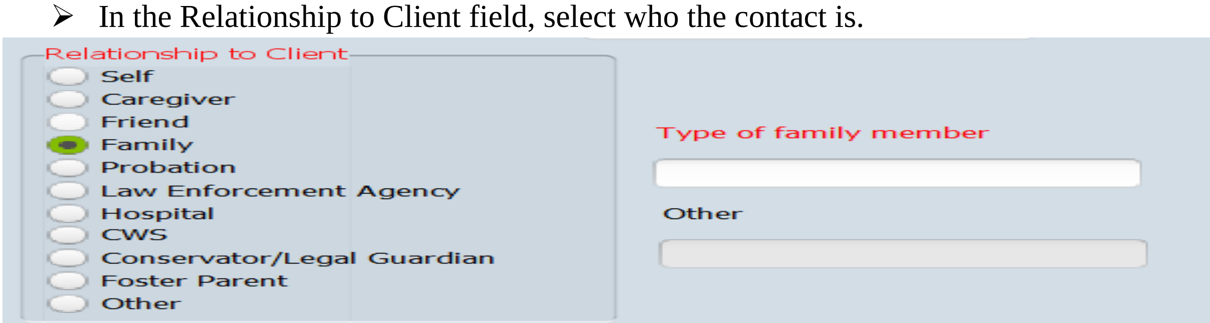
➢ In the Requestor Phone Number, enter the phone number of the person making contact.

Heads Up!

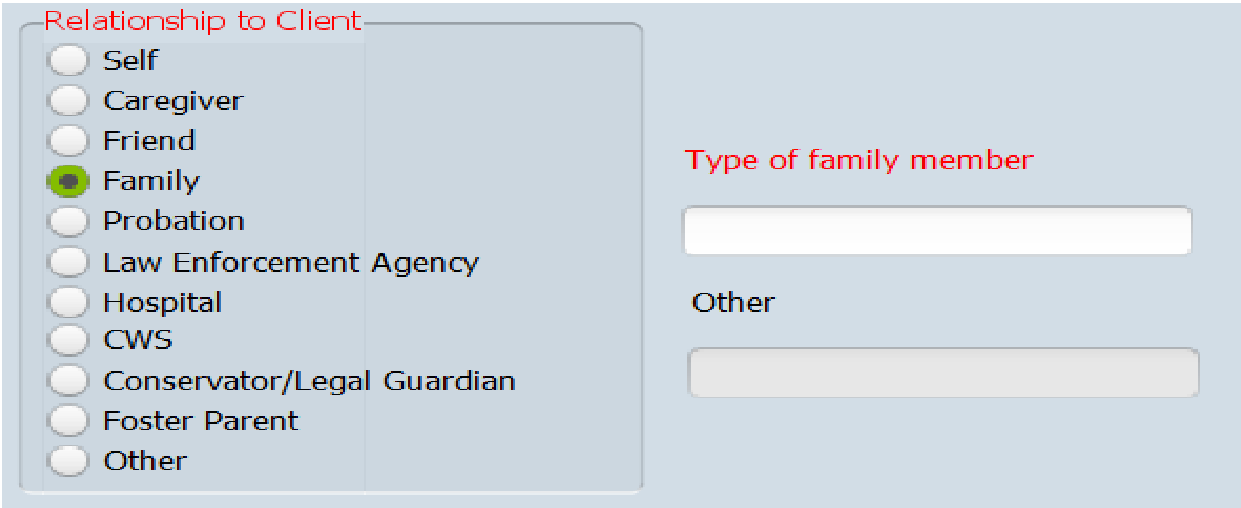
- If the Requestor refuses to provide their name, please enter Refused.
- If the Requestor Phone Number in unavailable or unknown, enter 123-456-7890

➢ In the Caller/Requester Primary Language, select what the caller's/requester's primary language is.

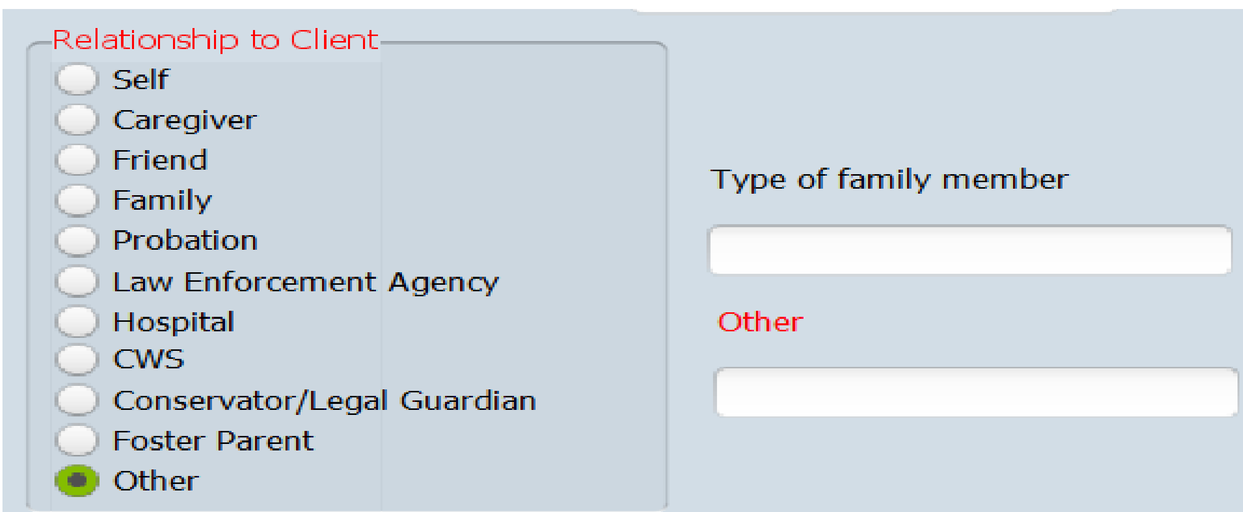
➢ In the Relationship to Client field, select who the contact is.



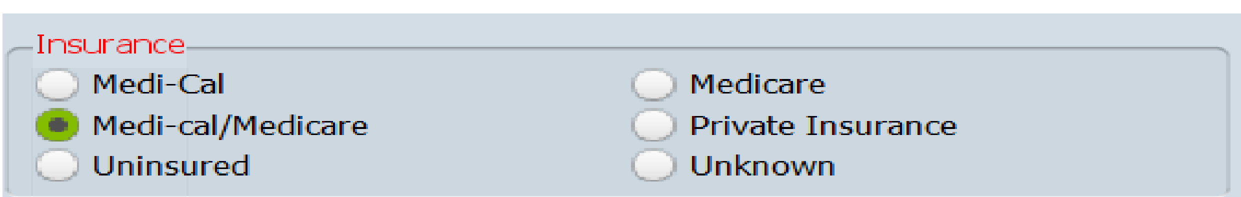
➢ If Family is selected from the Relationship to Client field, then Type of Family Member will become a required field. Type in the family member, E.G. Spouse, Sister, Child etc.



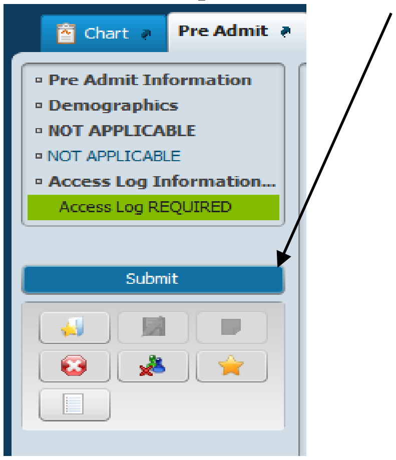
➢ If Other is selected from the Relationship to Client field, then Other field will become a required field. Type in the relationship to the beneficiary.



➢ In the Insurance field, select what type of insurance the contact states. This is a self – reported field and requires verification at a later time in the contact.



➢ When this complete, select Submit.



Heads Up!

- If the client was a new client, when Submit is selected the MR# will register in the system. If this form is exited before a submission a MR# will not exist.
- When Submit is selected, the Pre Admit Discharge will automatically be launched.

Pre Admit Discharge

Menu Path

Avatar PM > Client Management >Episode Management > Pre Admit Discharge or you can enter "Pre Admit Discharge" under Search Forms or it will launch once a Pre Admit Access Log is submitted.

Heads Up!

- The Access Log PreAdmit/Discharge form can be used instead of the Pre Admit Access Log and Pre Admit Discharge. This form is a bundle and open the discharge as soon as the admit has been submitted.

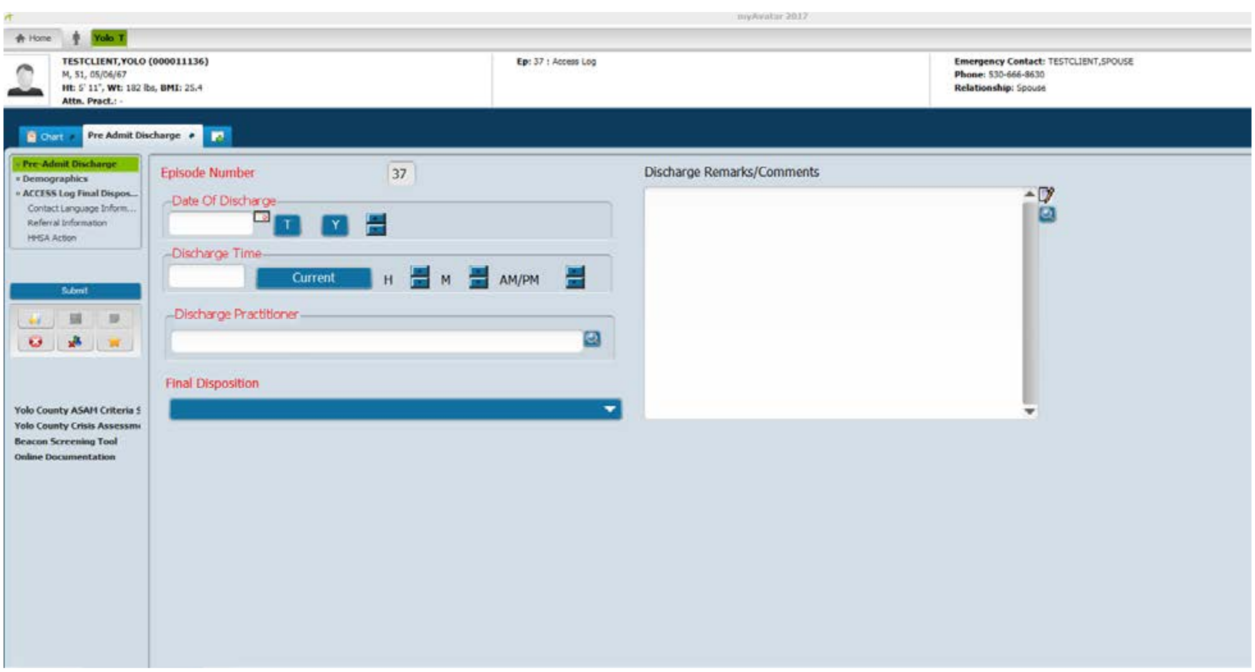
Name	Menu Path
Access Log PreAdmit/Discharge	Avatar PM / Access

Details

- A client must have been pre-admitted through the Pre Admit Access Log.
- This form discharges a pre-admission client from a pre-admission program.

Steps

➤ Open the Pre-Admit Discharge form. (if bundle was not used). The below will open.



- ➢ The Episode Number field shows the episode client’s number

- ➢ In the Date of Discharge field, enter the date of discharge, or use 

for Today’s date or 

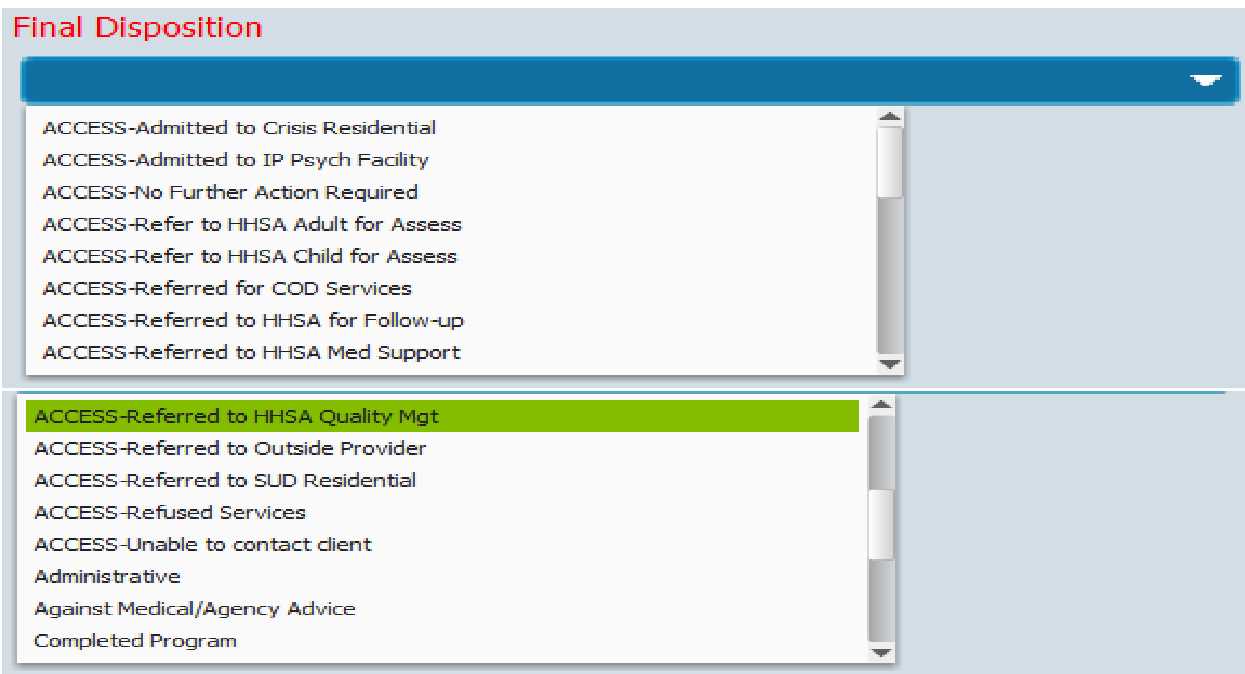
for Yesterday’s date.

- ➢ In the Discharge Time field enter the time of contact by clicking on 

or enter the time in Military time E.G. for 3pm enter 1500

- ➢ In the Discharge Practitioner field, enter the name of practitioner that is discharging the client or if you know the practitioner id #, enter here.

- ➢ In the Final Disposition field, select the appropriate choice.

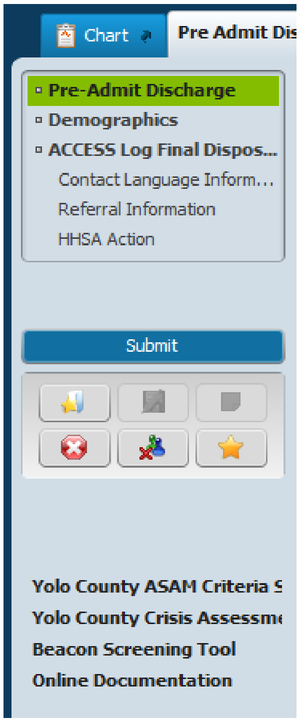


Heads Up!

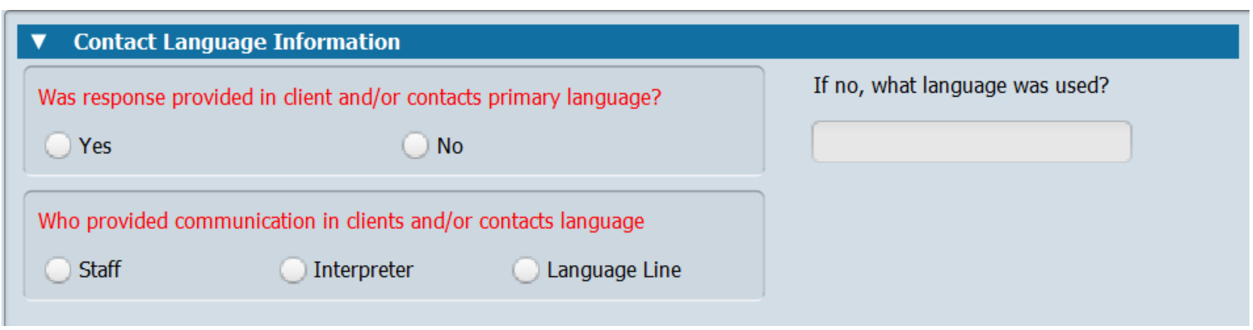
- Selection in this field will determine who will need to follow-up (if any) to the contact. It is very important to select the correct follow up choice so that clients’ needs are responded too.

- For guidance on what to select, please refer to the Access Log Instructional Guide.

➢ The next tab selection available on the left, is the Demographic tab. This is another opportunity to capture any demographic data that has been obtained since the Pre Admit Access Log.

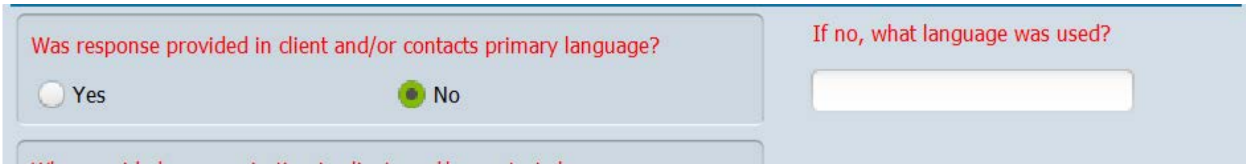


➢ The next tab selection available on the left, is the Access Log Final Disposition. This will open into Contact Language Information.



➢ In the Was Response provided in client and/or contacts primary language field, select Yes or No.

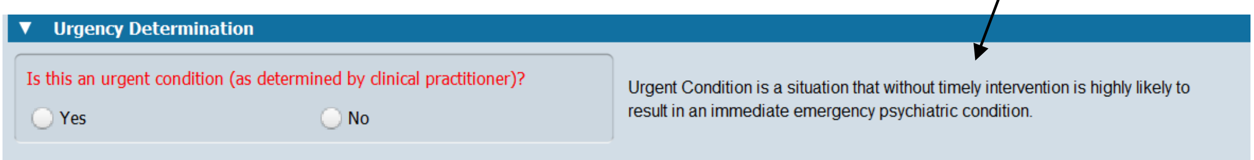
➢ If No is selected, the If no, what language was used? Will become a required field.



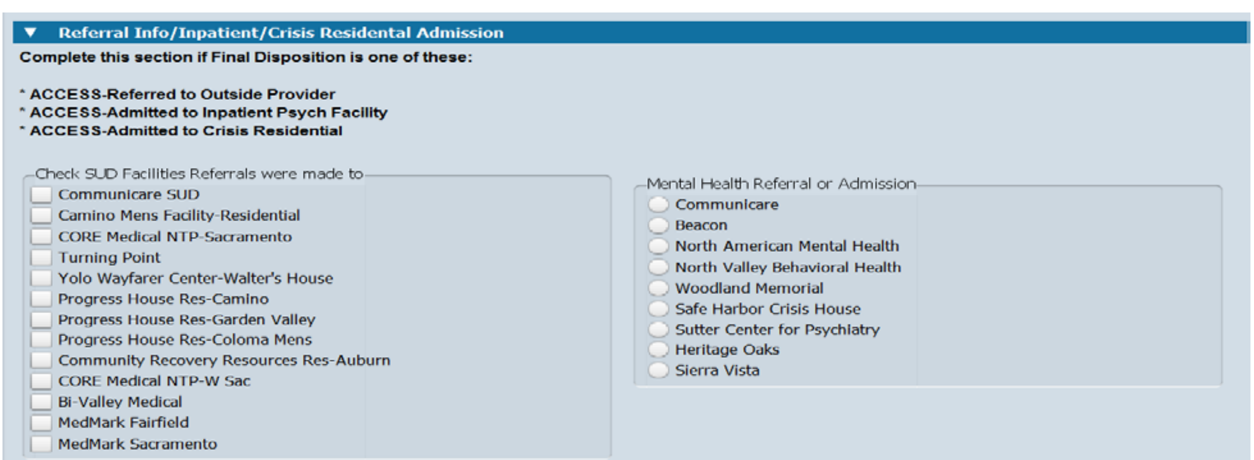
- In the If no, what language was used? Field, enter the name of the language client has provided.

- In the Who provided communication in clients and/or contact language, select either:
  - Staff – if the staff conversed in client's primary language
  - Interpreter – if an interpreter was utilized for translation E.G. Client's relative. This will primarily be used in face to face translation and is any translation that is provided outside of the Language Line or Staff member.
  - Language Line – if the Language Line was utilized for interpretation services.

- The next tab selection with the Access Log Final Disposition is the Urgency Determination. The urgency of a situation is preferably determined by a clinical staff member. The definition of urgent condition is provided, to aid in answering the question correctly.



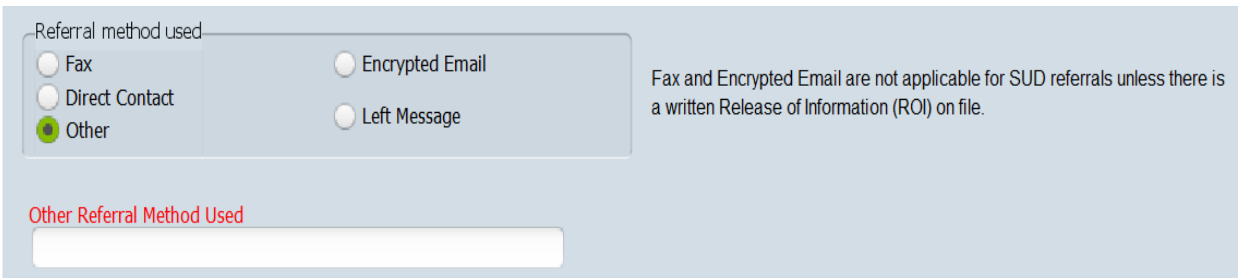
- The next tab selection within Access Log Final Disposition is the Referral Info/Inpatient/Crisis Residential Admission. This is to be used if the final disposition was one of the following: Access-Referred to Outside Provider, Access-Admitted to Inpatient Psych Facility, Access-Admitted to Crisis Residential.



Heads Up!

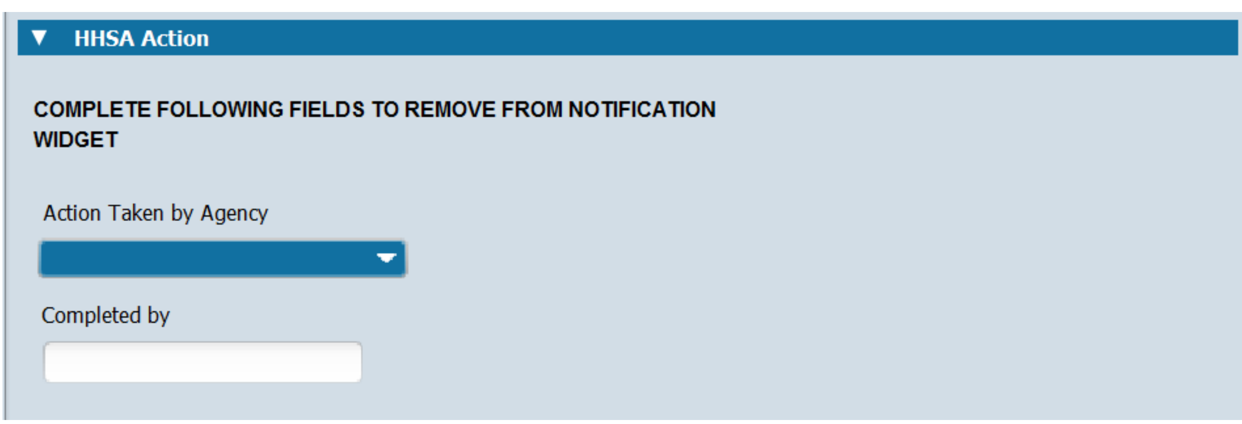
- Both SUD Facilities and MH referrals can be selected
- Please check all referrals that apply within SUD Facilities Referrals, this is a multi-select option.
- For Mental Health Referral or Admission, there can only be one selection

➢ In the Referral Method used, select how the referral was issued.

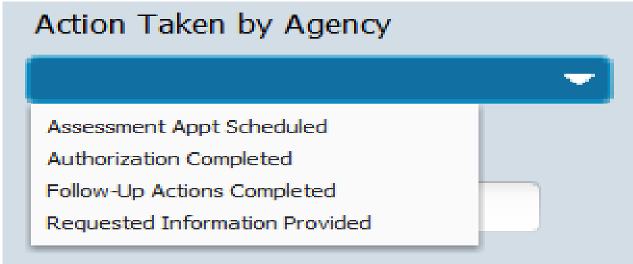


➢ If the referral was not made as a fax, encrypted email, direct contact or left message, then select other and enter method used in the Other Referral Method Used field.

➢ The next tab selection within Access Log Final Disposition is the HHSA Action. This tab is for HHSA ONLY – Non Access Point Staff and provides the ability to remove client information form widgets when follow up's have been completed.

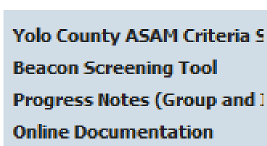


- In the Action Taken by Agency field, select the appropriate completed action.



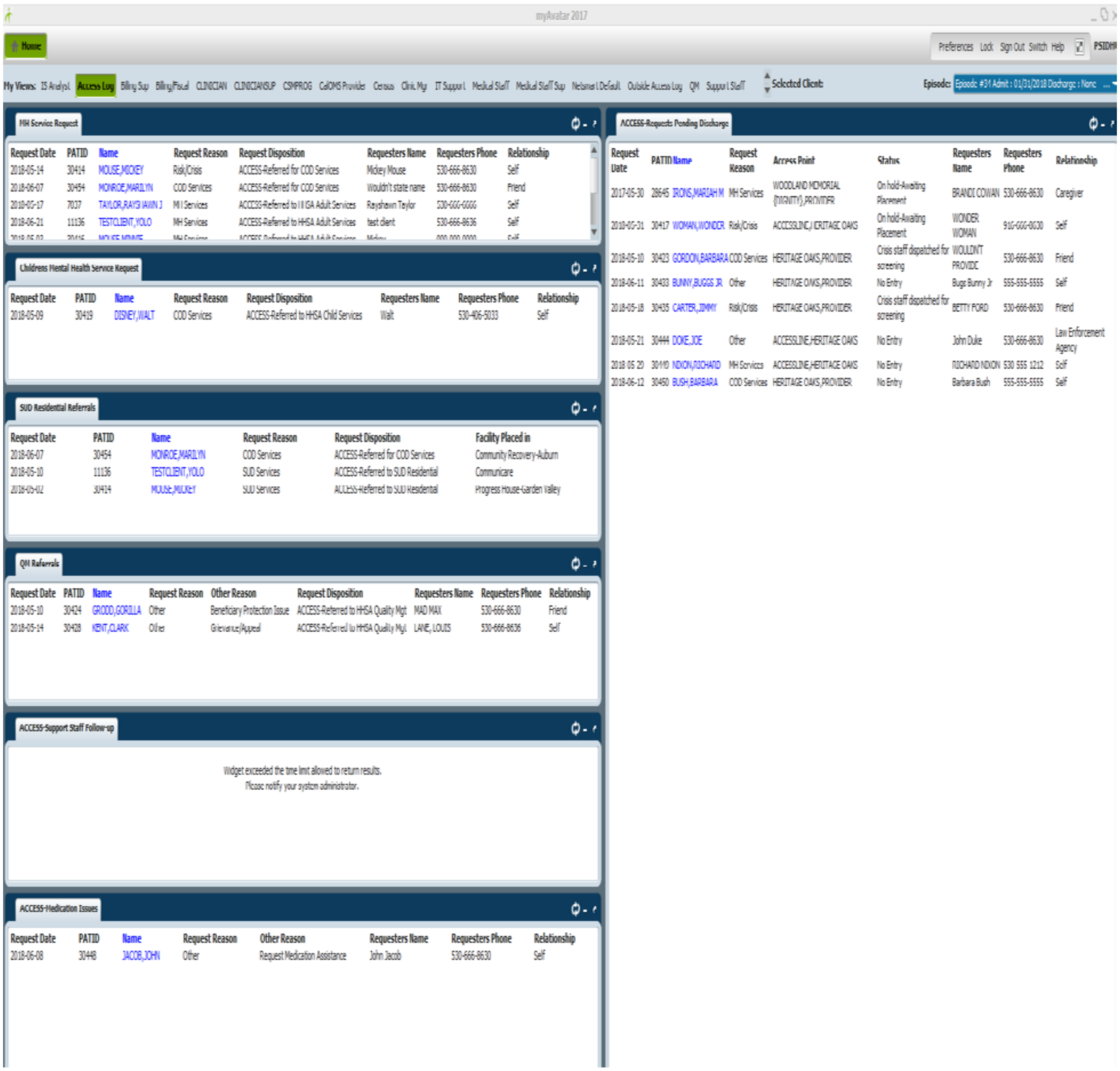
- In the Completed by field, enter the name of the person completing the HHSA Action.

> Heads Up!
>
> - Formatting requirements for the Completed by field are:
>   - All CAPS
>   - First Name, Last Name
> - This is ONLY to be used by the staff that are responsible for maintaining any widgets, with exception to the ACCESS-Requests Pending Discharges. This particular widget is removed when a discharge occurs.

> Heads Up!
>
> - The different screening tools are available for easy access on the left side of the Pre Admit Discharge form for completion.
>
> 
>
>
> - Progress Notes (Group and Individual) is also available for quick access to writing a progress note.

Widgets

- There are multiple widgets available for ease of follow up. Not all widgets are available to user roles; they have been assigned based upon business flow needs.



- A widget is identified by buttons available on the right hand side. The icon refreshes the widget, the icon minimizes the widget and the icon undocks the widget so that it can be placed on another screen or moved around. (To redock click on)

- Clicking on blue text (a hyperlink), will launch the widget into the form the widget is compiling from.

MH Service Request

Request Date	PATID	Name	Request Reason	Request Disposition	Requesters Name	Requesters Phone	Relationship
2018-05-14	30414	MOUSE,MICKEY	Risk/Crisis	ACCESS-Referred for COD Services	Mickey Mouse	530-666-8630	Self
2018-06-07	30454	MONROE,MARILYN	COD Services	ACCESS-Referred for COD Services	Wouldn't state name	530-666-8630	Friend
2018-05-17	7037	TAYLOR,RAYSHAWN J	MH Services	ACCESS-Referred to HHSA Adult Services	Rayshawn Taylor	530-666-6666	Self
2018-06-21	11136	TESTCLIENT,YOLO	MH Services	ACCESS-Referred to HHSA Adult Services	test client	530-666-8636	Self
2018-05-03	30416	MOUSE,MINNIE	MH Services	ACCESS-Referred to HHSA Adult Services	Mickey	000-000-0000	Self

- Lists in the widget can be cleared or updated through the hyperlinks

ACCESS-Requests Pending Discharge

Request Date	PATID	Name	Request Reason	Access Point	Status	Requesters Name	Requesters Phone	Relationship
2017-05-30	28645	IRONS,MARIAH M	MH Services	WOODLAND MEMORIAL {DIGNITY},PROVIDER	On hold-Awaiting Placement	BRANDI COWAN	530-666-8630	Caregiver
2018-05-31	30417	WOMAN,WONDER	Risk/Crisis	ACCESSLINE,HERITAGE OAKS	On hold-Awaiting Placement	WONDER WOMAN	916-666-8630	Self
2018-05-10	30423	GORDON,BARBARA	COD Services	HERITAGE OAKS,PROVIDER	Crisis staff dispatched for screening	WOULDN'T PROVIDE	530-666-8630	Friend
2018-06-11	30433	BUNNY,BUGGS JR	Other	HERITAGE OAKS,PROVIDER	No Entry	Bugs Bunny Jr	555-555-5555	Self
2018-05-18	30435	CARTER,JIMMY	Risk/Crisis	HERITAGE OAKS,PROVIDER	Crisis staff dispatched for screening	BETTY FORD	530-666-8630	Friend
2018-05-21	30444	DOKE,JOE	Other	ACCESSLINE,HERITAGE OAKS	No Entry	John Duke	530-666-8630	Law Enforcement Agency
2018-05-29	30449	NIXON,RICHARD	MH Services	ACCESSLINE,HERITAGE OAKS	No Entry	RICHARD NIXON	530-555-1212	Self
2018-06-12	30450	BUSH,BARBARA	COD Services	HERITAGE OAKS,PROVIDER	No Entry	Barbara Bush	555-555-5555	Self