

## AVATAR Supervisor Tools 12/30/22 Revision

The following forms allow supervisors to edit services and forms in Avatar

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## Edit Service Information

Located at PM>Services>Outpatient Services

- Uses:**
- Change minutes of direct time, documentation, travel time
  - Change service code
  - Change service program
  - Change episode
  - Change Practitioner



*IMPORTANT: These functions are only allowed if within the same month of the service or by the 15<sup>th</sup> of the following month **OR** if "Status" displays as 'Open' when the function is performed (see below guidance)*

NOTE: Cannot be used to change the service date or services not related to a client (i.e. Y codes), contact [HHSQualityManagement@yolocounty.org](mailto:HHSQualityManagement@yolocounty.org) for requests to change date of service.

Make desired changes to service information and click Submit

Once changed, an item will be sent to the originators To-Do list notifying them of the change

The screenshot shows the 'Edit Service Information' form with several fields highlighted in yellow. A yellow arrow points from the 'Enter Client ID & Episode then click' text to the 'Select Service(s) To Edit' button. Another yellow arrow points from this button to the 'Select Service(s) To Edit' dialog box. A yellow box highlights the 'Status' column in the dialog box, and a yellow box contains a warning message.

**Enter Client ID & Episode then click**

Clicking 'Select Service(s) To Edit' will launch the below box to make a selection from

Service Date	Service Code	Program	Practitioner	Status	Document	Claim Number
<input type="checkbox"/> 11/18/2022	Y90791	HHS-15-400	TEST, PRACTITIONER	Open		
<input type="checkbox"/> 11/30/2022	YT1017	HHS-15-400	INABA, AUDREY	Open		
<input type="checkbox"/> 12/01/2022	Y9910	HHS-15-400	TORMEY, TIMOTHY JOHN	Open		
<input type="checkbox"/> 12/02/2022	YT1017	HHS-15-400	INABA, AUDREY	Open		
<input type="checkbox"/> 12/19/2022	YT1017	HHS-15-405	INABA, AUDREY	Open		
<input type="checkbox"/> 12/28/2022	YT1017	HHS-15-401	INABA, AUDREY	Open		
<input type="checkbox"/> 12/29/2022	YT1017	HHS-15-400	INABA, AUDREY	Open		

If status does not display as "Open," do not proceed, contact Quality Management

## Progress Note Corrections

Located at CWS>Progress Notes

**Uses:** Void progress notes (remove from chart) allowed for **DUPLICATE NOTES ONLY** and **only within the same month of the service or by the 15<sup>th</sup> of the following month.**

**NOTE:** Only Final Progress notes can be voided. To void a note in Draft status, finalize it first and then use this form to void it.

**Client ID:** TESTCLIENT, YOLO, (11136)

**Episode Number:** Episode # 97 Admit : 08/17/2022 Discharge : None Program : 1...

**Start Date:** 08/17/2022

**End Date:**

**Note Type:**

- ADMH Specialist
- AMFT-Co-Signature Needed
- AMFT
- APCC-Co-Signature Needed
- APCC

**Correction Action:**

- Void Progress Note
- Revert Final Note to Draft

**Reason for Correction:**

**Comments:**

**Delete Service:**

- Yes
- No

**Annotations:**

- Enter Client ID and Episode Number at minimum, then click 'Select Note to Correct'
- Clicking 'Select Note to Correct' will launch a separate box, highlight the note to be corrected and click 'OK'

Client: TESTCLIENT, YOLO ( 11136 ) myAvatar 22

Note Date	Note For	Note Brief Description	Date	Time	By
12/07/2022	Existing Ser	ANOTHER TEST	12/07/2022	11:13 AM	AUDREY I
--> Service: Targeted Case Management (T1017)					
--> Service Date: 12/07/2022 Duration: 63					
12/08/2022	New Service	Mental Health History:Medical History:Substan	12/08/2022	11:01 AM	AUDREY I
--> Service: Targeted Case Management NON-BILLABLE (YT1017)					
--> Service Date: 12/09/2022 Duration: 35					
12/19/2022	New Service	Mental Health History:Medical History:Substan	12/19/2022	02:06 PM	AUDREY I
--> Service: Targeted Case Management (T1017)					
--> Service Date: 12/19/2022 Duration: 35					
12/29/2022	New Service	Test	12/29/2022	08:48 AM	AUDREY I
--> Service: Targeted Case Management NON-BILLABLE (YT1017)					
--> Service Date: 12/29/2022 Duration: 35					

**Annotations:**

- Clicking 'Select Note to Correct' will launch a separate box, highlight the note to be corrected and click 'OK'

**Client ID:** TESTCLIENT, YOLO, (11136)

**Episode Number:** Episode # 97 Admit : 08/17/2022 Discharge : None Program : 1...

**Start Date:** 08/17/2022

**End Date:**

**Note Type:**

- ADMH Specialist
- AMFT-Co-Signature Needed
- AMFT
- APCC-Co-Signature Needed
- APCC

**Correction Action:**

- Void Progress Note
- Revert Final Note to Draft

**Reason for Correction:** Duplicate Note

**Comments:** Per staff request

**Delete Service:**

- Yes
- No

**Annotations:**

- Click on 'Void Progress Note' Dropdown "Duplicate Note"
- Enter Comments
- Important: Select YES to 'Delete Service'

## Practitioner Only Service Delete

Located at PM>System Maintenance>System Definition

**Uses:** Delete Y codes not related to a client from AVATAR. Normally these codes are entered via the Post Staff Activity Log

**NOTE:** Y codes entered erroneously require deletion and re-entry to correct

Common service codes include:

Y9901-Training	Y9945-Time Off
Y9902-Meetings	Y9946-Admin Time
Y9907-Break Time	Y9964-Supervision

The screenshot shows the 'Practitioner Only Service Delete' web application interface. The main content area features a search field for the 'Practitioner' with a placeholder text: 'Enter either the staff practitioner ID or last name - select appropriate staff from display'. Below this are two date selection fields: 'Start Date' and 'End Date', each with a calendar icon and buttons for 'Today' and 'Yesterday'. At the bottom of the main area are two buttons: 'Display Practitioner' and 'Delete'. On the left side, there is a sidebar with a 'Submit' button, a set of navigation icons (home, back, forward, search, refresh, star), and a link for 'Online Documentation'.

## Treatment Plan Status Override

Located at CWS>CWS Utilities

**Uses:** Revert a treatment plan to DRAFT from FINAL

Once reverted back to draft, an item will appear on the originators To-Do list notifying them of the draft treatment plan

The screenshot shows the 'Treatment Plan Status Override' web form. On the left is a sidebar with a 'Submit' button and 'Online Documentation' link. The main area contains a 'Select Client' dropdown menu with 'TESTCLIENT,YOLO (11136)' selected. To the right, there is a 'Select Client Plan' section with 'Final' selected, 'Plan Date: 10/05/2010', and 'Type: Initial'. Below this is a 'Print Treatment Plan' button. The 'Select Treatment Plan' dropdown shows '(52000) Client Treatment Plan'. A large text area labeled 'Override Reason' contains the prompt 'Enter appropriate reason for override'.

If a treatment plan is marked as Pending Approval, it can be converted back to draft using the Treatment Plan Status Override form or from the To-Do List

The screenshot shows the 'Approve To Do Item' web form. The sidebar on the left includes a 'Submit' button and 'Online Documentation' link. The main area displays 'To Do Information' with the following details: 'Date Sent : 01/13/2016', 'Time Sent : 04:23 PM', 'Sent By : RITA SAMARTINO', and 'Option : Client Treatment Plan'. Below this, it states 'Client Treatment Plan 'TEST' For Reviewing'. At the bottom, there are radio buttons for 'Approve To Do Item' with 'Yes' and 'No' options, and a 'View Detail' button. A 'Comments' text box is located at the very bottom.

## Treatment Plan Deletion

Located at CWS>CWS Utilities

**Uses:** Delete a treatment plan from a client chart

**NOTE:** Cannot be used to delete treatment plans that are marked as final. A final plan must be converted back to draft before it can be deleted.

Select Client Treatment Plan (Treatment Plan Number 1 is not used)

Select appropriate Episode and appropriate Treatment Plan

Choose Reason For Deletion – Administrative is only selection available

Comments – required

Press submit to delete the Treatment Plan from Avatar

The screenshot shows a web-based form titled "Treatment Plan Deletion". The form is located within a "Chart" window. On the left side, there is a sidebar with a "Submit" button and several icons (a thumbs up, a thumbs down, a star, and a star with a checkmark). Below the icons is a link for "Online Documentation". The main form area contains the following fields:

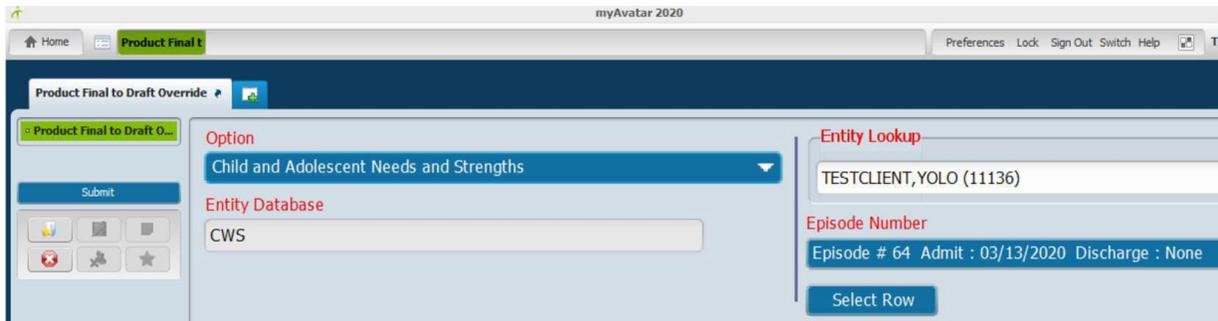
- Type Of Treatment Plan To Delete:** A radio button selection with two options: "Client Treatment Plan" (selected) and "Treatment Plan Number 1".
- Episode #:** A dropdown menu.
- Treatment Plan:** A dropdown menu.
- View Selected Treatment Plan:** A button.
- Reason For Deletion:** A dropdown menu.
- Comments:** A large text area with a vertical scrollbar on the right side.

## Product Final to Draft Override (for CANS)

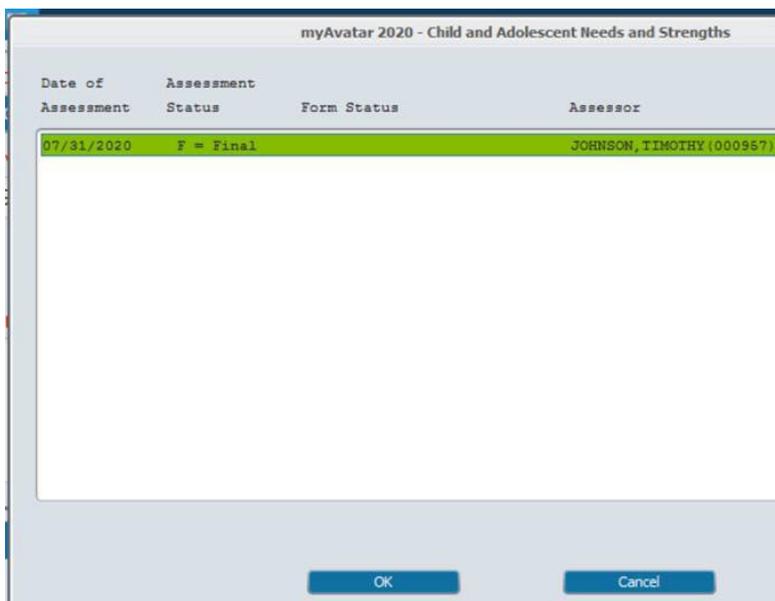
Located at CWS>CWS Utilities

**Uses:** To revert a finalized Child and Adolescent Needs and Strengths (CANS) form back to draft

Drop down 'Option' and select "Childhood Adolescent Needs and Strengths" / Enter Client ID or name in 'Entity Lookup' / Select Episode



Click 'Select Row' button and Click on the CANS you want to revert back to Draft and click 'OK'



Date of Assessment	Assessment Status	Form Status	Assessor
07/31/2020	F = Final		JOHNSON, TIMOTHY (000957)

Enter 'Override Reason'



Click Submit

## Final to Draft Override (for Assessments)

Located at: Avatar CWS>Radplus Utilities>Workflow Management>Final to Draft Override

**Uses:** Reverts Standardized Mental Health Assessment (and other Assessment types) from Final back to Draft

Select the appropriate assessment type in the 'Form' field and the client MR# in the Entity Lookup field. Click 'Select Row' when activated

Final to Draft Override

Workflow Management F

Submit

Form: Standardized Mental Health Assessment

Entity Database: User Defined Client

Entity Lookup: TESTCLIENT.YOLO, (11136)

Select Row

Row Contents

Page No. 1 Avatar CWS2004 Run Date: 09/13/2022

County of Yolo

Health and Human Services Agency

\* Standardized Mental Health Assessment \*

NAME: TESTCLIENT.YOLO ID: 000011136

Print Row Contents

Override Reason

Enter reason override needs to be completed

Choose the appropriate assessment and select OK

myAvatar 2021 - Mental Health Universal Assessment			
Assessment		Staff Completing	
Start Date	Assessment Type	Assessment	Draft/Final
03/13/2020	Initial	HHSA PRACTITIONER	Final
06/17/2022	Reassessment	HHSA PRACTITIONER	Final

OK

Enter the override reason then click Submit

Override Reason

Enter override reason here

## Helpful Reports for Supervisors

### **Yolo Supervisory Reports** – located at CWS>Reports

Displays a series of 10 subreports pertaining to a specific staff member between two dates.

### **Staff Appointment List** – located at CWS>Reports>Supervisory Reports

Displays a staff members scheduled appointments as listed in the Scheduling Calendar between two dates. Grouped by day and provides a total number of minutes scheduled for each day

### **Unbillable Services Progress Note Review** – located at CWS>Reports>Supervisory Reports

Grouped by staff member and displays all unbillable (Y9910/Y9911) progress notes written between 2 dates.

### **Treatment Plans Due Report** – located at CWS>Reports>Supervisory Reports

Grouped by Attending Practitioner and displays clients with an open Mental Health, FSP, or Turning Point Episode without an Avatar treatment plan, an overdue plan, or plan due in the next 30 or 60 days as determined by the plan end date

### **To Do Items by Staff** - located at CWS>Reports>Supervisory Reports

Grouped by staff member and displays all items listed on staff members To-Do list

### **Progress Note Drafts** - located at CWS>Reports>Supervisory Reports

Displays all progress notes in Draft status for specified staff member

### **Attending Practitioner Caseload Report** - located at CWS>Reports>Caseload Reports

Grouped by attending practitioner and displays limited client information. Effective report to determine clients assigned to a specific staff member

### **CANS Report** - located at CWS>Reports>CANS Reports

Displays data entered in an individual Child and Adolescent Needs and Strengths form for one particular client in a readable, summarized, printable format

### **CANS Early Childhood Module Report** - located at CWS>Reports>CANS Reports

Displays data from both the CANS Early Childhood Module form and the CANS Trauma/Adverse Childhood Experience Module form in a readable, summarized printable format