Avatar NX Corrections in the EHR for SUPT Residential Programs Training Guide

Sacramento County Avatar NX Training and Support

Purpose of this Training Guide:

Users must attend Corrections in the EHR Training before gaining access to the forms and reports shown in this Training Guide. This Training Guide is designed to be an additional tool for users at Residential Programs who have attended Corrections in the EHR Training. The Training Guide may change as Avatar NX trainings are updated. If you have any additional questions please contact Avatar Support at 916-876-5806 or Avatar@Saccounty.net.

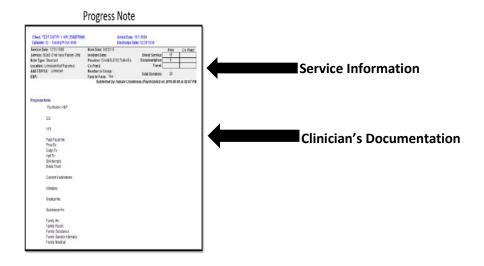
Practice Management Review:

OCDR Process- The OCDR process is done to delete a service that is in Open or Closed status. A service may need to be deleted if it cannot be edited by using the Edit Service Information form, the service is a duplicate, the service was billed in error, or the service is in closed status and cannot be edited. OCDR's are sent to QM for Mental Health programs (OCDR@saccounty.net) or Sacramento County SUPT from SUPT programs (SUPT-OCDR@Saccounty.net).

Claims Correction Spreadsheet (CCS)- The CCS process is done if a service needs to be voided or replaced but it has already been claimed. You would use the CCS to correct a service that was done in error after the service has been claimed. All CCS's are sent to Avatar-Fiscal at Avatar-Fiscal@saccounty.net.

Orphaned Progress Notes:

Most services in Avatar are generated by entering a progress note. When a clinician enters a progress note for a client there are two pieces to the form. The top portion of the Progress Note Entry form generates a service charge and the bottom portion of the form is the clinician's documentation for the service.



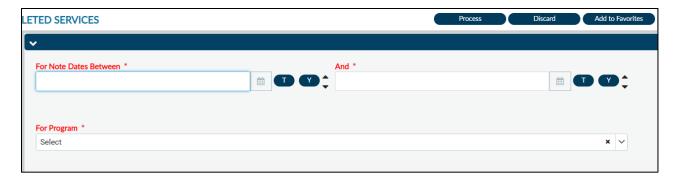
When a service is removed by going through the OCDR or CCS process that creates an Orphaned Progress Note, the progress note has no services attached to it. In order to fix this a new service needs to be created by using the Client Charge Input form and attached to the progress note using the "Attach Individual Notes to Existing Services/Appointments" form.

Tools for locating Orphaned Progress Notes

Progress Notes with Deleted Services Report

When a service has been deleted from Avatar that will leave the note as Independent. Since Residential Programs enter Independent Notes it may be challenging to see which notes were entered as Independent and which notes are Orphaned due to service information being deleted. The "Progress Notes with Deleted Services" report will only show Independent Notes that once had a service attached to it.

- 1. Search for the "Progress Notes with Deleted Services" report in your Forms and Data widget.
- 2. Enter a date range and your program, click "Process".

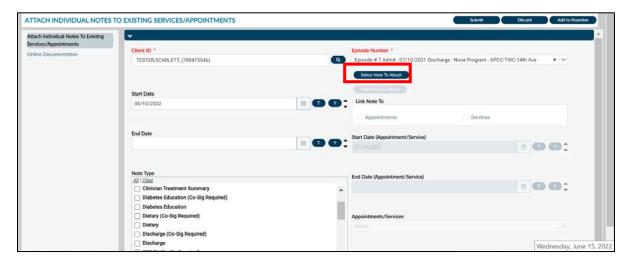


- 3. The report will show any Independent Notes that once had a service attached.
- 4. This can be used as a tool to see which notes are Orphaned and need the service information attached to the note.

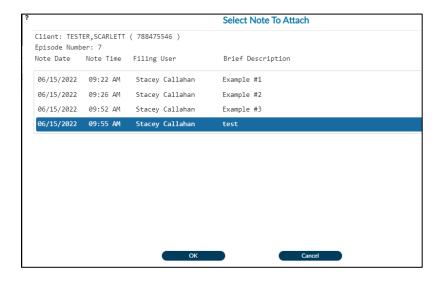


Attaching a Service to an Orphaned Note

- 1. After the incorrect service has been removed by the OCDR or CCS process, open the "Client Charge Input" form and enter a new service with the correct service information for your client.
- 2. Open the "Attach Individual Notes to Existing Services/Appointments" form.
- 3. Enter the Client ID and episode number to enable the other sections of the form.

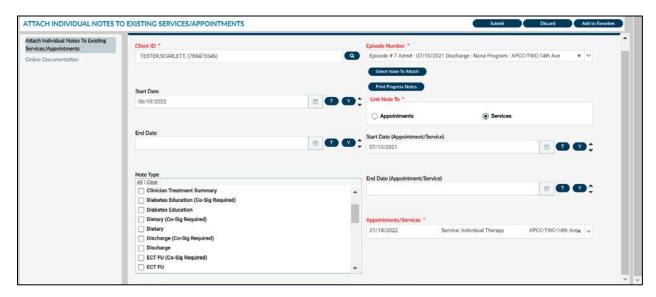


- 4. On the left hand side of the form you will enter your criteria to search for your orphaned progress note. The "Start Date" will default to the Admission date. You can change the "Start Date" and enter an "End Date" to narrow your search. You can put as much or as little criteria as you choose.
- 5. Once you've entered the date range and/or criteria click on the "Select Note to Attach" button. A box will populate that shows any orphaned notes that fit your search criteria. Choose the note that needs to be attached to the service. Click OK.



- 6. There is an option to print the note. You can use this to verify you selected the correct note.
- 7. Choose what you want to link the note to. In most cases you will select "Service".

 Selecting Appointment will link the note to an appointment created in the Scheduling
 Calendar. Only agencies who use the Avatar Scheduling Calendar would use this option.
- 8. The bottom right-hand section is where you will enter in your service information. The Start Date will default to the admission date. You are able to update the criteria to the date of the service.
- 9. Click on the Appointment/Services drop-down to choose the service you want to link to the progress note. This will be the service you entered into the Client Charge Input form. Click Submit to save.



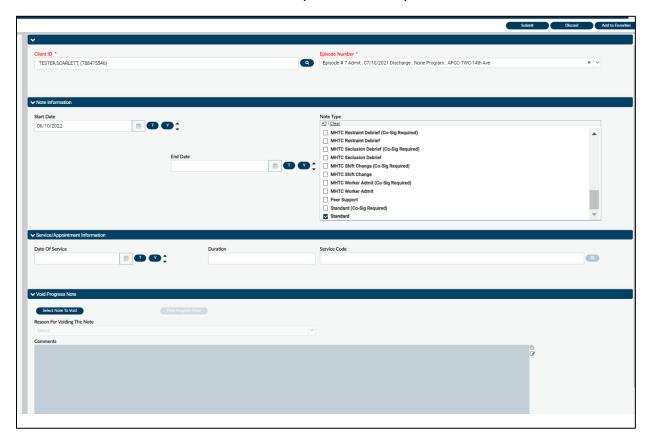
Voiding a Progress Note

There may be times when you do not want to attach a new service to a progress note. If the note was done in error, for the wrong client, or if there are too many documentation errors you may want to void the service and progress note altogether. In this instance you would follow the same OCDR or CCS process, but instead of creating and attaching a new service you will void the progress note.

The permissions to void a progress note will not be given to everyone who attends corrections training. The Authorized Approver at your site will have to specifically request those permissions for your account. Only two representatives at each program will have the ability to void progress notes.

Steps to Voiding a Progress Note:

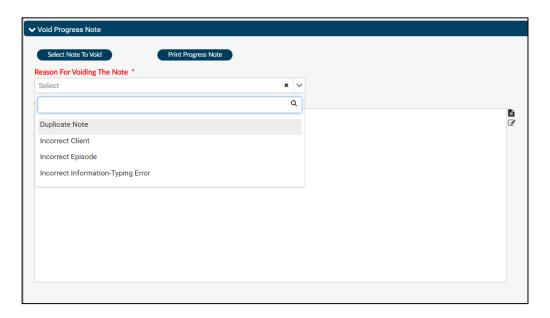
- 1. Open the Void Progress Notes form. Enter the client ID and episode number.
- 2. Enter your Note Information. This criteria will help you locate the orphaned progress note. You can enter as much or as little criteria as you choose.
- 3. If the service information is still attached to the note you can enter the service information. If the service has already been deleted you can leave this section blank.



4. Click the Select Note To Void button. A box will populate that includes all progress notes (orphaned and non-orphaned notes) that fits the criteria you entered above. Choose the note that needs to be voided. You can figure out which note needs to be voided by viewing the details of each note. In the example below, the last note has no service information below it. That would be the note that needs to be voided. Click on your note then click OK.



- 5. Once a note is chosen the bottom Void Progress Note portion of the form will become enabled. You can click the Print Progress Note button to view the note details and print the note for your records.
- 6. Choose your reason for voiding the note from the drop down. Below that enter your comments. Each agency may require different information in the Comments section. Click Submit to save.



7. You can run the "Progress Notes Voided Report" to view any progress notes that have been voided at your agency.



Notes Voided For ZZ_ARPW_Adult_Res_FairOaks Between 7/11/2021 and 7/16/2021

Original Entry By Staff: Stacey Callahan

 Date of Note
 Note Time
 Note Type

 07/16/2021
 01:14 PM
 Standard

Voided By Stacey Callahan Reason for Void Duplicate Note