

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.

Progress Note

Client: 7537-DIVTY v HR; 758077800	Admit Date: 10/1/19		
Labnote ID - Turnover: 628	Discharge Date: 12/27/19		
Service Date: 12/27/19	Write Date: 12/27/19	Days	Co-Pract
Service 1000: 6rd New Patient (M)	Session Date:	Direct Session:	0
Note Type: Standard	Provider: CHARLES, T, M, D, A	Documentation:	0
Location: Uncommitted/Assigned	Co-Pract:	Time:	
ADD/DELETE: Unchecked	Number in Group:		
EBP:	Face to Face: Yes	Total Duration:	21
Submitted by Jamaris Chubbins (Psychiatrist) on 2019-12-27 at 02:07 PM			

Progress Note:

Psychiatric NP

CC:

HPI:

Past Psych Hx:

Pres Hx:

Subst Hx:

Med Hx:

Social Hx:

Current Evaluation:

Allergies:

Diagnosis Hx:

Substance Hx:

Family Hx:

Family Psych:

Family Substance:

Family Genetic/Alcohol:

Family Medical:

Service Information

Clinician's Documentation

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.

 Sacramento County DBHS Progress Notes with Deleted Services Showing ZZ_ARPW_Adult_Res_FairOaks Final Notes with Note Dates between 5/16/2021 and 5/18/2021 Where a service has been Deleted and no new service has been attached						
Name	ID	EP	Note Date	Note Type	Practitioner	Deleted Service
TEST,SCARLETT	788469353	7	5/18/2021	Standard	TRAINER,FOUR	5/17/2021

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.

ATTACH INDIVIDUAL NOTES TO EXISTING SERVICES/APPOINTMENTS

Client ID *
TESTER,SCARLETT, (788475546)

Episode Number *
Episode # 7 Admit : 07/10/2021 Discharge : None Program : APOC-TWC-14th Ave

Select Note To Attach

Start Date
06/10/2022

End Date

Note Type
 Clinician Treatment Summary
 Diabetes Education (Co-Sig Required)
 Diabetes Education
 Dietary (Co-Sig Required)
 Dietary
 Discharge (Co-Sig Required)
 Discharge

Link Note To
 Appointments Services

Start Date (Appointment/Service)
07/10/2021

End Date (Appointment/Service)

Appointments/Services
Select

Wednesday, June 15, 2022

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.

Select Note To Attach

Client: TESTER,SCARLETT (788475546)
Episode Number: 7

Note Date	Note Time	Filing User	Brief Description
06/15/2022	09:22 AM	Stacey Callahan	Example #1
06/15/2022	09:26 AM	Stacey Callahan	Example #2
06/15/2022	09:52 AM	Stacey Callahan	Example #3
06/15/2022	09:55 AM	Stacey Callahan	test

OK Cancel

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.

The screenshot shows a web application interface for voiding progress notes. At the top right, there are buttons for 'Submit', 'Discard', and 'Add to Favorites'. The form is organized into several sections:

- Client ID:** TESTER, SCARLETT, (788475546)
- Episode Number:** Episode # 7 Admit : 07/10/2021 Discharge : None Program : APCC-TWC-14th Ave
- Note Information:**
 - Start Date: 06/10/2022
 - End Date: (empty)
 - Note Type: Standard, Peer Support, Standard (Co-Sig Required), MHTC Worker Admit, MHTC Worker Admit (Co-Sig Required), MHTC Shift Change, MHTC Shift Change (Co-Sig Required), MHTC Seclusion Debrief, MHTC Seclusion Debrief (Co-Sig Required), MHTC Restraint Debrief, MHTC Restraint Debrief (Co-Sig Required)
- Service/Appointment Information:**
 - Date Of Service: (empty)
 - Duration: (empty)
 - Service Code: (empty)
- Void Progress Note:**
 - Select Note To Void: (button)
 - Print Progress Note: (button)
 - Reason For Voiding The Note: (dropdown menu)
 - Comments: (text area)

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.

Select Note To Void

Client: TESTER, SCARLETT (788475546)

Note Date	Note For	Note Brief Description	Entry Date	Entry Time	Entry By (Option)
--> Service: Assessment - without medical services (93010)					
--> Service Date: 12/29/2021 Duration: 72					
03/16/2022	New Service	03/16/2022	12:07 PM	Stacey Callahan
--> Service: Assessment - without medical services (93010)					
--> Service Date: 03/16/2022 Duration: 59					
05/25/2022	New Service	PARTICIPANTS:COORDINATION ACTIVITIES: R	05/25/2022	12:50 PM	Stacey Callahan
06/15/2022	Independent	Example #1	06/15/2022	09:22 AM	Stacey Callahan
06/15/2022	Independent	Example #2	06/15/2022	09:26 AM	Stacey Callahan
06/15/2022	Independent	Example #3	06/15/2022	09:52 AM	Stacey Callahan
06/15/2022	Independent	test	06/15/2022	09:55 AM	Stacey Callahan

- 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.
- 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.

Void Progress Note

Reason For Voiding The Note *

Select

- Duplicate Note
- Incorrect Client
- Incorrect Episode
- Incorrect Information-Typing Error

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



Sacramento County DBHS
Progress Notes Voided Report

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	Voided By	Reason for Void
<u>07/18/2021</u>	01:14 PM	Standard	Stacey Callahan	Duplicate Note