Provider Service Request 2.0 Training Guide

Sacramento County Avatar Training and Support

Purpose of this Training Guide:

Users must attend Provider Service Request 2.0 Training before gaining access to the forms and reports shown in this guide. This guide is designed to be an additional tool for Avatar NX users who have attended Provider Service Request 2.0 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.

What is a Service Request:

A Service Request is a request for authorization of services. Service requests can be done for a variety of reasons such as an initial authorization, transfer programs, psych testing, and TBS services. Service requests are sent to the Access Team for mental health services or System of Care (SOC) for substance use services, both are county units that authorize services.

Service Request 2.0 Form:

- Not all fields in this form are marked "Red and Required" however you should fill in all of the information that you have. Your service request may not be authorized if not enough information is given.
- The first page must be completed for all service requests. The additional pages will be filled out if the service request being entered corresponds with any of those request. If so you will fill out the page that corresponds with your service request. For example if you are requesting TBS services, make sure to fill out the TBS Requests page.
- There is no Draft or Final option for this form. Once the form has been submitted you will not be able to come back and make edits. The Avatar team is also not able to unlock the form for you. If any updates need to be added you will have to contact the Access Team or SOC.

Filling out the Form:

1. **Pages/Sections of the Form:** The form will default you to the "Request Details". This is required for all requests. If you do a service request for any of the other options listed to the left, make sure to fill out the corresponding page.
2. **Services Widget:** This widget is used as a tool to determine if your client is considered new or existing. If there are services listed then the client is considered existing, even if the services were not entered at your program. This is only needed for Initial Requests. To hide the widget click on the arrow pointing toward the widget.
3. **Submit/Discard/Add to Favorites:** Click "Submit" to save, "Discard" to close without saving, or "Add to Favorites" to add this form to your My Favorites list.

4. **Request Type:** Indicate whether the request is for Substance Use or Mental Health. You can enter a request for both.
5. **Requested Level of Urgency:** Click on the lightbulb next to the field to see a definition for each urgency level.
6. **Requested Action:** The drop-down will show a list of all possible service requests. Choose the service request that you are creating.
7. **Submitting Entity:** Will default to Service Provider, you will want to keep it as Service Provider.
8. **Submitting Party Name:** Will be who is submitting the service request on behalf of that client (service provider, school, CPS, etc).
9. **Submitting Party Same as Request Contact:** If "Yes" is chosen Access or SOC will contact the submitting party. If "No" is chosen you are able to enter the contact information for the person you want Access or SOC to contact (such as the client or caregiver).
10. **Contact:** If you chose "No" above, then enter the contact and the contacts information.

11. Primary Caregiver: Enter your client's caregiver's name and information if applicable. If the client does not have a caregiver, those fields can be left blank.

12. CIN: Enter the client's CIN number (Medi-Cal ID) if available.

13. Associated Population: Select all that apply for your client.

14. CPS Involvement: If your client is under the age of 18 make sure to make a selection. If the client is over the age of 18 this can be left blank. More than one selection can be made.

15. Current Diagnosis: You can search for the diagnosis by typing in the diagnosis or the diagnosis code. Hit Enter or click on the magnifying glass. Double click on the appropriate diagnosis.

16. Current Medications (Right Click for Template): Anytime you see "Right Click for Template" make sure to use the template in the system. Click on the top icon to the right of the text box and choose Current Medication Template, under System

Templates. The template will populate in the text field, allowing you to fill in the medication information under each header. To make the text box larger click on the pen and notepad symbol under the template icon. ✎

Additional medications can be added by clicking on the template button again.

17. **Staff Verifying Continued Medical Necessity**: Enter the last name or staff ID of the staff who is verifying Continued Medical Necessity. The staff member will appear on the drop-down, double click to choose them. This is used for re-authorizations.
18. **Presenting Problems:** Mark all that apply.
19. **Risk factors:** Mark all that apply.

20. **Comments Regarding Presenting Problems and Risk Factors:** This section also has a template. The template can be accessed by using the same steps as number 11. The template will be named "Comments regarding risk factors". Fill in all sections that apply.
21. **Psychiatric History/Treatment History**: This section also has a template. The template can be accessed by using the same steps as number 11 and 15. The template will be named "Psychiatric History". Fill in all sections that apply.

The following are links to relevant clinical items in this episode completed with in the past year (90 days for Progress Notes)

Progress Note Link *   **22**

Justin Miller - 07/20/2022 - Standard (93010 DUR:100) - NOT66310.001   ✕   ˅

Core Assessment Link

Select

Client Plan Link

Select   ✕   ˅

LOCUS Link

Select

Services Requested *

Explanation to Access or SOC of the services you are requesting.
    23

22. **Progress Note, Client Plan, Core Assessment, and LOCUS Link:** You are able to link any of the above to the service request. If there is none on file it will not populate on the drop down. The only one that is required is a Progress Note. If there is no progress note on file, there is an option to choose N/A.
23. **Services Requested:** This is a free text. Enter why you are requesting services for the client.

Service Request Reports:

SR 2.0 by System Code: This will show you where Access or SOC is at in the process of processing your service request. You can see if it has been assigned and/or dispositioned.

SR 2.0 Disposition by Program: Once a request has been dispositioned you can view what the disposition was as well as Access and SOC's notes on that disposition. If you click on the disposition hyperlink on the report it will bring up the details of that request.

Scanning:

There may be times Access or SOC may need you to scan items into the clients chart.

1. Select your client, if they are not currently on your recent client list you can search for them in the "What can I help you find?" search bar.
2. Click the Document Capture icon on the Control Panel.
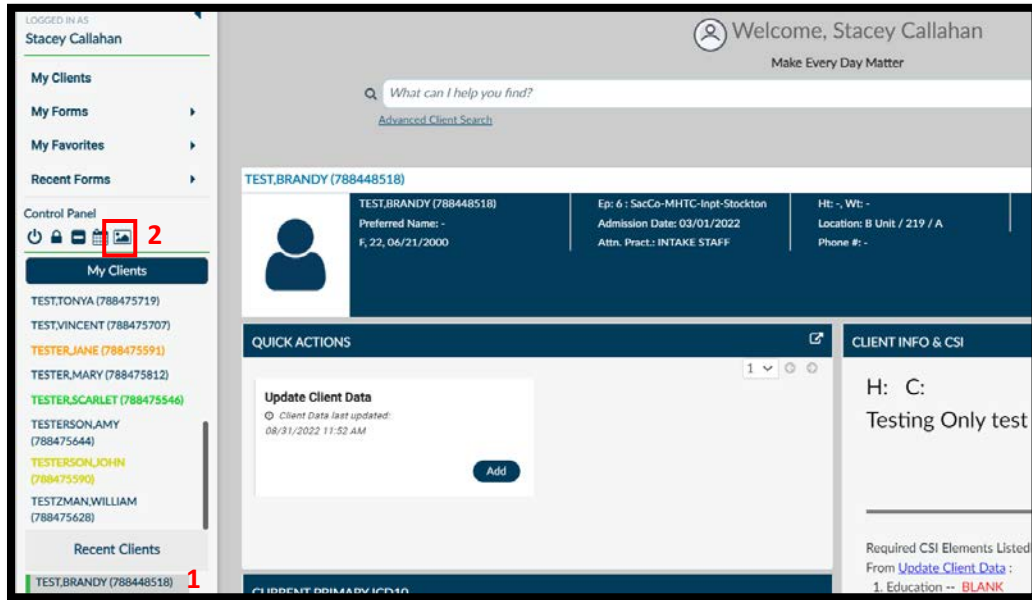
3. A prompt will come up asking if you want to Scan, Import, or Cancel. Scan would only be used if a hard scanner is hooked up to that computer. Import is used if the document was scanned and saved to your computer. Choose the appropriate option.
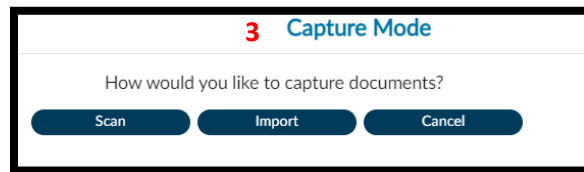
4. Another prompt will ask what episode you want to save the document in. The default is Non-episodic, make sure to change this to your episode. If a document is scanned into Non-episodic everyone will have access to that document. You will only see the episodes within your system code.
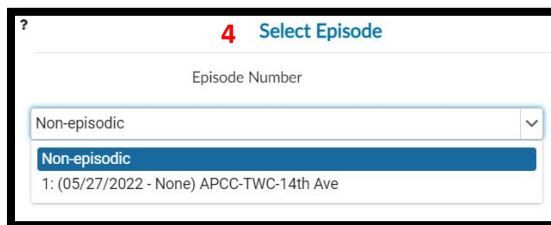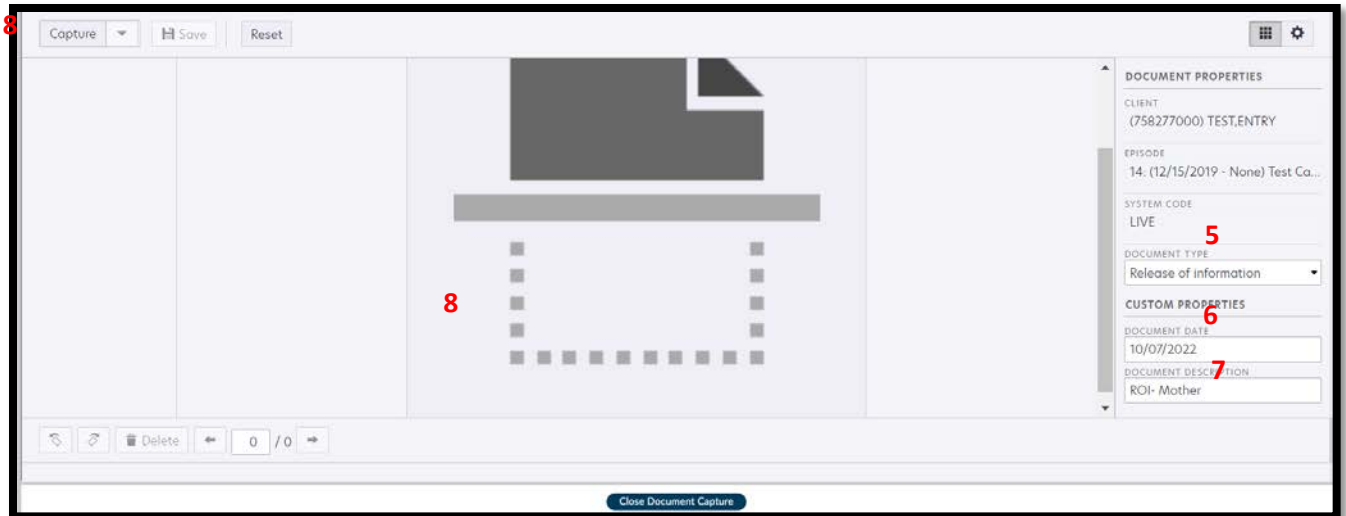
5. The Document Type will list the different folders or categories a document can be saved into. You may not have access to all folders. For example if you work for an outpatient mental health program you would not have access to folders specific to Access, MHTC, or alcohol and drug programs. If you are unsure which category to scan the document into you can reference QM's Sacramento County Scanned Document Management form. The form can be found on their website, https://dhs.saccounty.net/BHS/Pages/Utilization-Review/GI-Provider-Resources-Utilization-Review.aspx.

6. The Document Date will default to today's date. This should be the origination date of the document, not the date you're importing the document.

7. Enter a detailed Document Description. If all documents are named the same you will have difficulty locating your document in the future.

8. There are two methods you are able to use when scanning.

8a. Browse Forms

   a. Click on the center Scan button OR click on the Capture button.
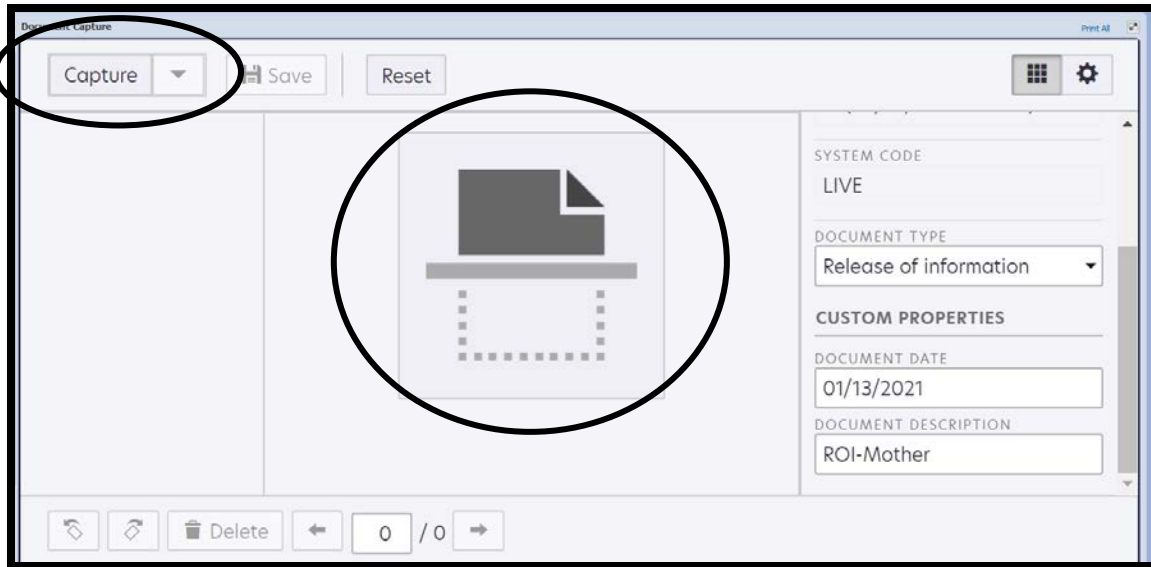
b. A box will populate. Click on the Browse button.
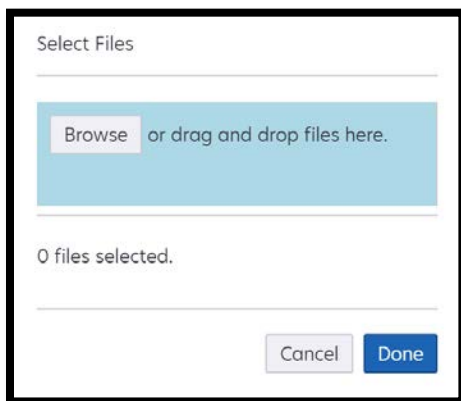
c. You are able to browse through your folders to find the document you are scanning. Once you've found the document double click to select.
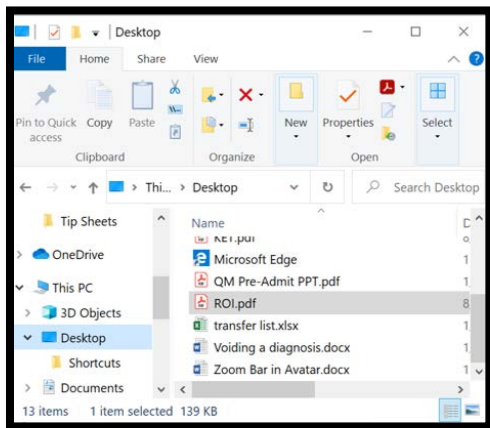
d. Once your document has been selected it will bring you back to the Browse box. You can see a file has been selected. Click on the Done button.
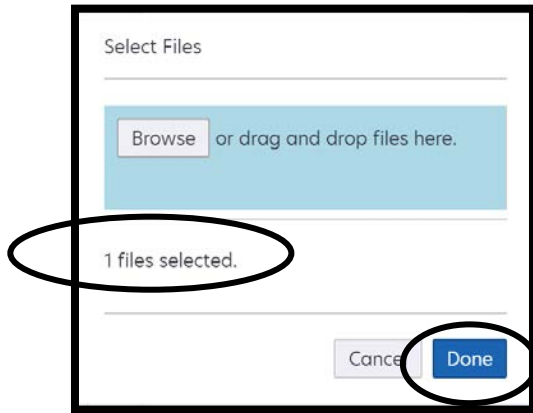
e. You will be brought back to the original page. Here you are able to see a preview of the document. If you are happy with the document you will click Save at the top to save the document into the client's chart. If you do not want to save the document you can click the Delete button at the bottom of the screen.
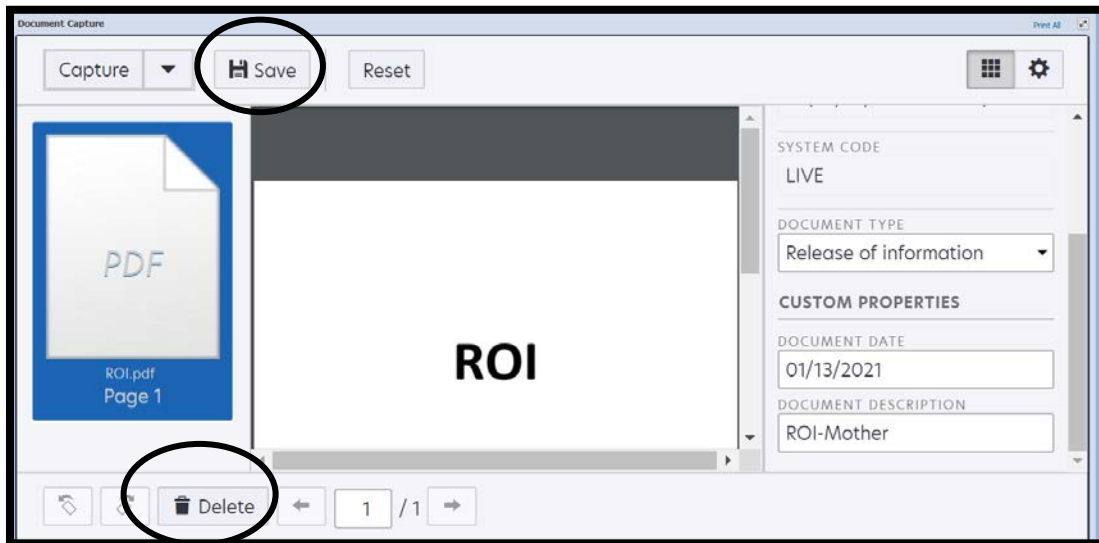
8b. Drag and Drop

a. Click the Capture button OR Scan button.
b. Open your File Explorer in a separate window. Locate the item you want to scan and drag it and drop into the Browse box.
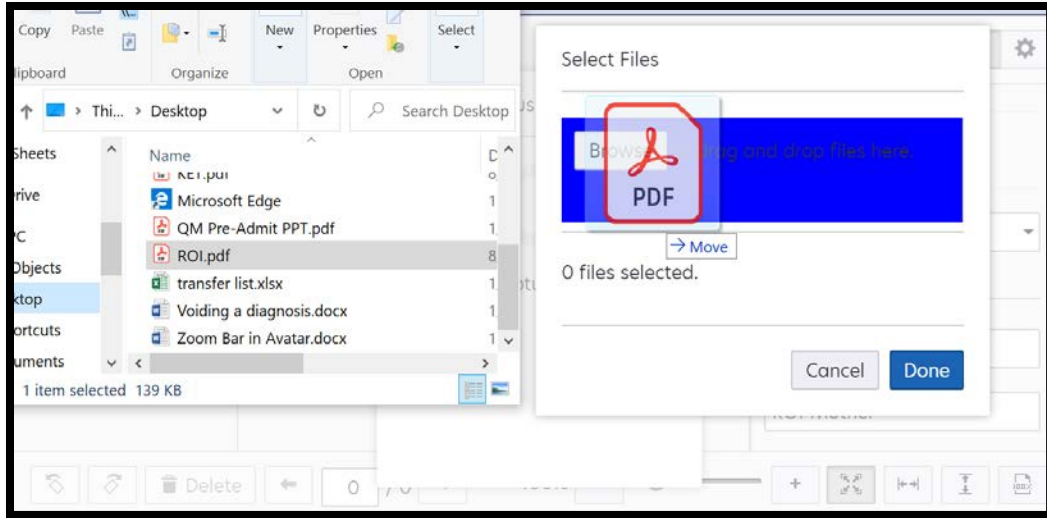
      c.   Continue with steps d&e above.

Viewing Scanned Documents

1. Click on the "Client Chart" console at the top of your Avatar NX screen.
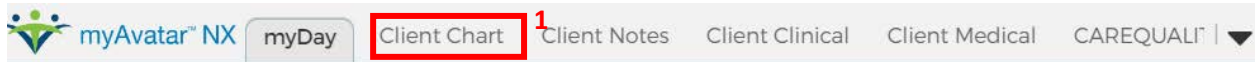
2. Under the "Scanned" category, choose the category you scanned into.
3. In the "Client Documents" widget select the document you want to view.
4. The document will show on the "Console Widget Viewer".
5. You can undock the Console Widget Viewer to see the document larger. If you do this you will need to undock before selecting the item. If you've already selected, just click on it again after undocking.
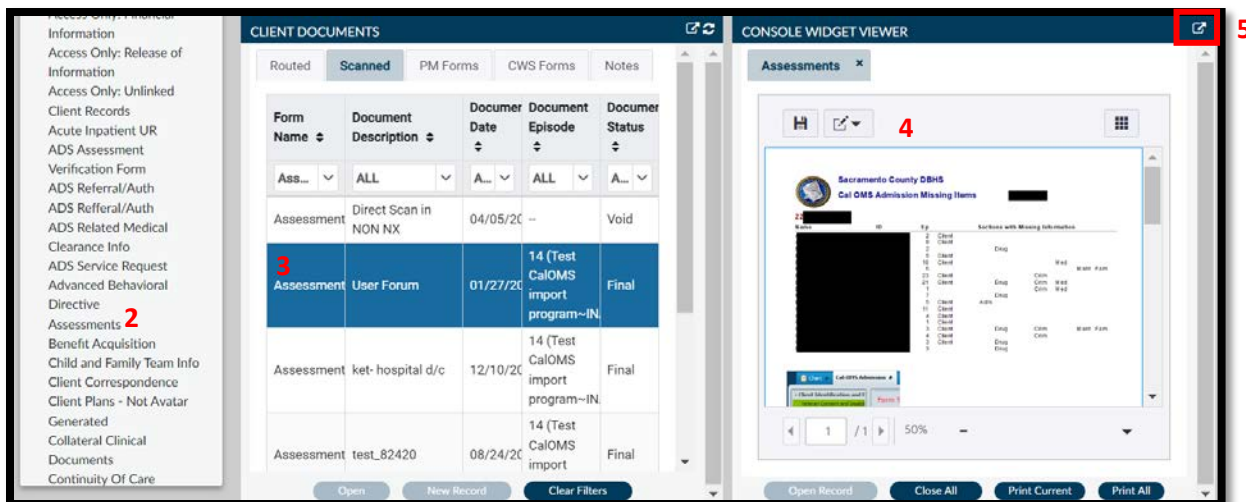
Voiding and Correcting Documents

1. Open the "Clinical Document Viewer" form
2. Select Type- Should be set to Client
3. Select All or Individual Client- Choose Individual
4. Select Client- Enter client Avatar ID or client's name (last name, first name)
5. Episode- Choose the episode that the document was scanned into, you can also choose non-episodic.
6. The above fields are the only fields you will need to enter data into. Click on Process at the bottom of the form.

7. A list of all documents scanned in that client's chart under the episode you chose will appear. Click on the document that needs to be corrected.

8. This will allow you to view the document to confirm you have the correct document. If the document is correct, click on the Void button on the bottom of the form.

9. You have the option to void the document or correct the document. To void the document you will choose the Void option, to make corrections to the document click Void & Copy.
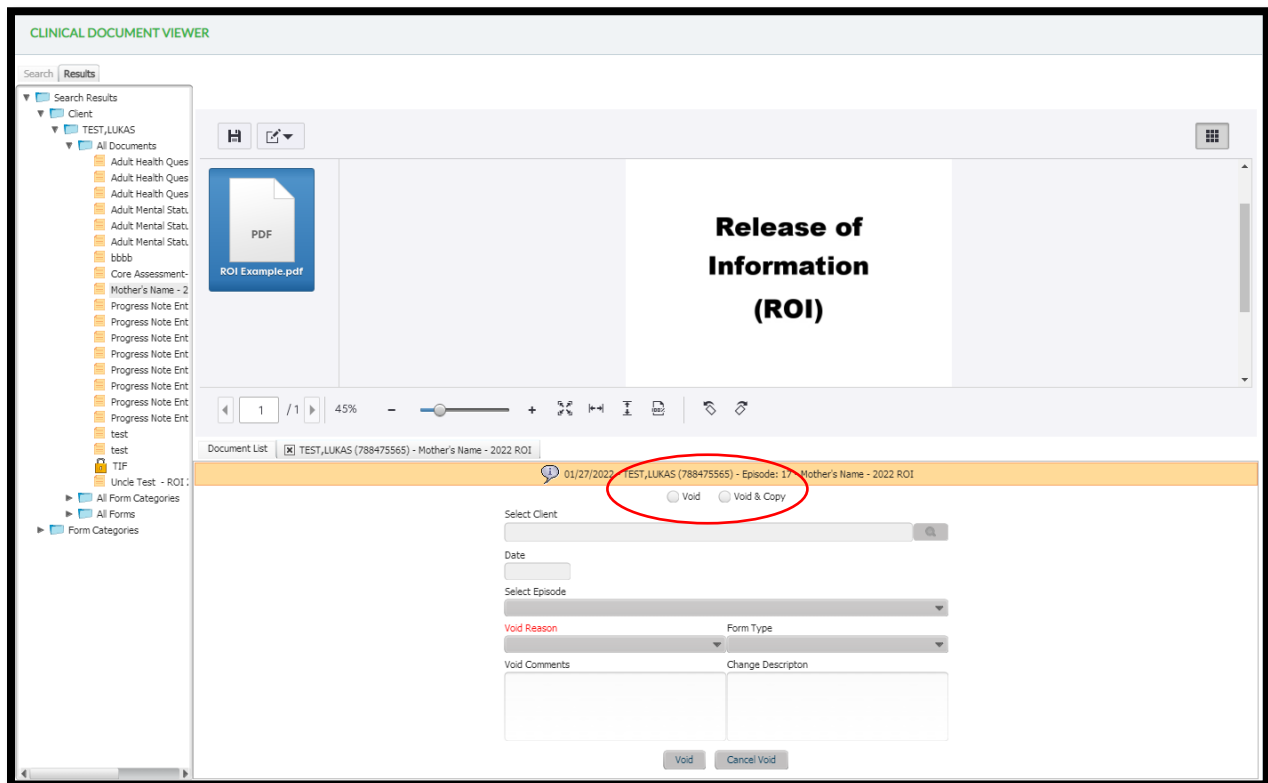
10. If the document needs to be voided choose the Void option, enter your Void Reason, and comments on why the document needs to be voided. Click on Void on the bottom of the form.
11. If the document needs to be corrected choose the Void & Copy option, enter your Void Reason, and comments on why the document needs to be voided. You are able to make the below corrections:
    a. Move the document to another client's chart by entering in the correct client under Select Client.
    b. Change the document date. Enter the correct date in the Date field.
    c. Move the document to a different episode. Select the correct episode in the Select Episode drop-down. This can also be used to move non-episodic documents to their correct episode.
    d. Form Type drop-down will allow you to move a document into a different folder.
12. Multiple corrections can be made at once. Click on the Void button on the bottom once completed.
13. A document can only be voided or corrected once. If a document that has already been corrected needs to be voided you will have to contact the Avatar Team.

14. To leave the form, click on the "Search" button on the top left of the form.
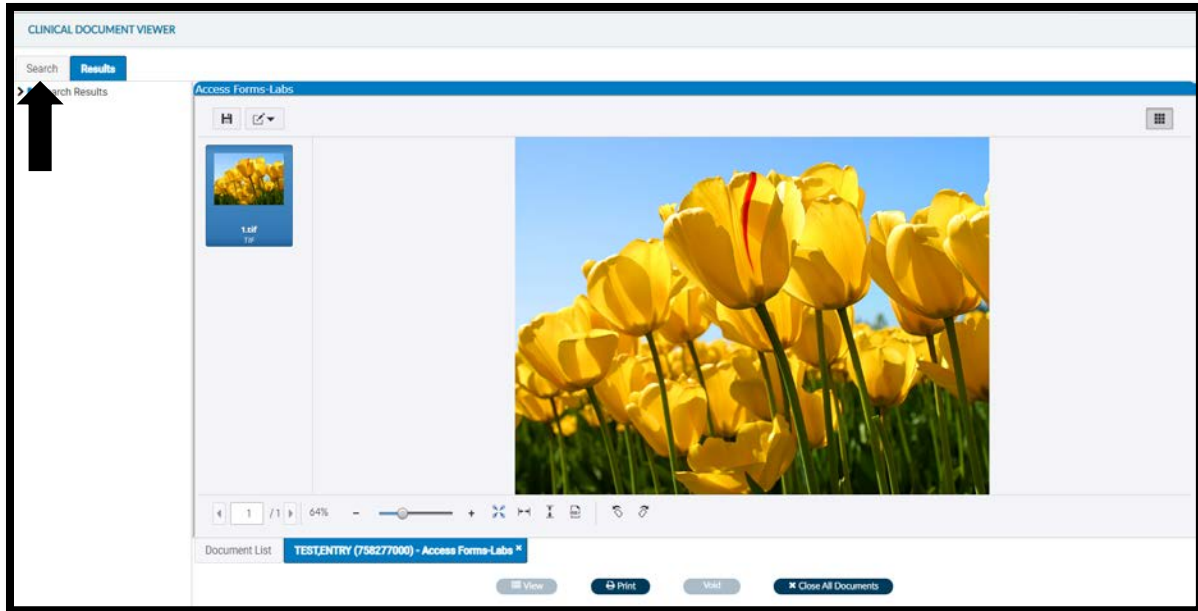
15. This will bring you back to the main screen. From there scroll down and click "Close"