MyAvatar PM Manual
Mirmont Behavioral Health
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Logging In to Avatar

1) Open the Link to Avatar: You can do this a few different ways.
   a. Click on the Avatar icon located on your desktop.
   b. Or, you can enter the web address into your browser directly. [https://MLH.netsmartcloud.com](https://MLH.netsmartcloud.com)
2) Once you have navigated to the website, the Avatar launch page will open. Click **Start Avatar**.

3) To log in:
   a. Enter your **System Code** (all caps). For example, **UAT**.
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b. Enter your **username** (all caps). This will be the first letter of your first name followed by the first seven letters of your last name for a total of 8 characters. For example: Kathy McGuire would be KMCGUIRE.

c. Enter your **Password** (all caps).

d. **If this is your first login**, you will be immediately prompted to change your password. Your password must be 6 characters long. It must contain at least one number.

   **NOTE:** MLHS is looking into a way to have your network password be the password to use for Avatar. Updates will be provided!

e. Once you have entered your Username and Password, Click **Sign In**.

If You Forget Your Password

1) If you are having problems with your Password or forgot your password, notify the Help Desk at 484-596(HELP).

Screen Sign Out

**If you need to step away from your desk, remember to sign out** by clicking on Sign Out located in the upper right-hand corner of your screen. This will prevent unauthorized users from viewing client information in Avatar (HIPAA).

Always save when possible to avoid losing work to any surprises such as power surges. You will lose any unsaved data when you sign out, so make sure you save and close all open forms.
To Change Your Current Password

1) Locate the Forms & Data widget on your home view.

2) Click in the Search Forms field and type Change Current Password. Double click on the form name to open up the form.

3) Once you have opened up the form, in the **Current Password** field, enter your current password.
4) In the New Password field, enter your new password.
5) In the Re-Enter New Password field, enter your new password again.
6) On the left hand side of the screen, **click on the Submit Button.**

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**Quick Tips and Shortcuts**

1) **Lightbulbs** on forms: These symbols are a link to helpful information about filling in a particular question or field.

2) You can use the space bar to check or uncheck a box in a list field.

3) In a *list field*, use the arrow keys to move back and forth between check boxes, buttons or list items in a dropdown field.

4) On Home Console, you can click once on Client to select the client, and then go and search for a form to pull up with that Client (works on most forms).

5) Most forms that have a name search field require you to do the search by entering the last name. You can also use the Client number or practitioner number in name search fields.

6) In *date fields*, you can use **T** for today instead of entering a date. You can also use **Y** for Yesterday. You can also use the “+” or “-” sign to enter a date a certain number of days in the
future or in the past. For example, “T-30” gives you a date 30 days in the past. “T+90” gives you a date 90 days in the future. After you enter the formula, press “enter” or “tab” and Avatar will calculate the date for you.

7) To clear a radio button, checkbox, drop down menu item or list item in a question (you want the question to be totally blank), click any of the buttons in the question, then click <F5>, which will clear the field. If you have done this correctly, none of the buttons in this field will be clicked. If this is a List Item type question, the question will appear blank.

Spell Check and Automatic Correction
Avatar has spell check that you can use in most fields. Misspelled words will have a red, wavy line underneath them.

You can right-click on the misspelled word to pull up a menu of spellings. Left click on the one you want. To add a word to the dictionary, click <Add>.
You can also press <F7> on your keyboard to call up spell check.

You can create a shortcut phrase for longer words and phrases that you use regularly. (This is similar to how autocorrect works in Microsoft Word.) To use this feature, go to Preferences, in the upper right of your home screen.

**Note:** If you set this up, be sure to use codes that are not common in regular language or contained within a word, otherwise when you do your spell check you may add phrases in places you do not want them to be! Note: this will only work on the machine that you have set up the dictionary on.

There may be times when you want to cut and paste text from another document into Avatar. When you do this, you might get a lot of red wavy lines underneath your pasted text. Avatar thinks these are spelling errors.

To get rid of the red lines, first, press F7 to call up spell check. Then, click “Ignore all” multiple times to get rid of the red lines.
When you are done, a popup will appear letting you know that spell check is complete. Click <OK>.

To get rid of many red lines in pasted text, click “Ignore All” several times.

Click “Add” to add a new word to your dictionary. After you do this, the word will no longer show as misspelled.
Avatar Home View and Menu Bar

Home View: Once you launch Avatar, the first screen that will appear is the Home View. You will see rectangles called Widgets arrayed on your desktop. Widgets show various types of information from Avatar. (See the Widgets section below for more information.)
Menu Bar: The Menu Bar, located at the top of the Avatar Home screen, allows you to navigate among Forms, Chart Views, and your Home view. The Menu Bar contains the Home Button that will return you to your Home View. No matter where you are within the system, the Menu Bar displays any Forms or Charts that you have open. You can have multiple forms and charts open at once and they will all be listed here so you can toggle back and forth between them and the home view without using the windows task bar.

The Menu Bar also contains your Preferences and Help menus. The User ID that is logged in is displayed in the upper right hand corner.

NOTE: Be cognizant of the number of forms you have open, you can lock out other users by having forms open which you are actively modifying.

Consoles or Multiple Home Views: Depending on how your access is set up, you may have more than one view. These views are known as Consoles and are displayed in a row next to My Views. To switch between views, just click on the Console name. In the example, the Home Console is selected (highlighted in green).
Widgets

Widgets are the small rectangles on your Home View and in the Chart Overview. Widgets show views of information from Avatar. Some Widgets provide handy views of commonly used information, like the Service History Widget. Other Widgets are interactive, like the My Calendar Widget and the My To Do’s Widget.

One way to think of a Widget is like a window or door in a house. If you look through the window, you can see into the house, although you cannot interact with anyone in the house. Some Widgets work like this. You can view information, but you cannot interact with it. Other Widgets are like a door, where information travels in and out of the house. They allow you to have interaction with the Avatar database.

Widgets are assigned by Role and may vary depending on your access. A role is essentially a job category in Avatar. Examples of roles are PreProcessing Specialist, Nurse, or Dietician. Your Avatar Role determines which Home Console or Consoles you have and which widgets you have on your console(s). Your role also determines what forms you can work with, what you can view, which charts you can view, scheduling and many other functions.

If there is a form that you think you should have access to, but you cannot find it, there may be something that needs to be changed in your setup. If you think that your setup needs to be changed, contact the computer helpdesk at 484-596(HELP).

Widget Features and Changing Your Widget Setup

You can move widgets around on your desktop to a setup that is convenient for you and your workflow.

Enlarge and Shrink Widgets

Make widgets larger or smaller by clicking and dragging on the edges. For example, hover your cursor over the line between the Forms & Data widget and the Client Episodes Diagnosis widget until the cursor turns into a double sided arrow.
Click and drag to the left or right to change the size of the two widgets.

**Turn a Widget into a Toggle Button at the Bottom of Your Home Console**

There are some widgets that you may not need to see most of the time. You can change them into a button at the bottom of your home screen to make space for the widgets you most commonly use. You can click this button to see widget contents. Click it again to close it.

For example, you may not want to look at the contents of the *Did You Know?* Widget all of the time.
To change it into a toggle button, click on the little minus sign in the upper right hand corner of the widget.

At the bottom of your Home console, see how the widget is now a rectangular button.

If you click this button, the Did you Know? Widget opens up again.

If you click the button a second time, the widget turns back into a button.
Widgets that you use infrequently can be placed at the bottom of your Home Console so that they don’t take up valuable real estate on your Home Console.

Dock and Undock Widgets

Sometimes, you might want to pop a widget out of your home console and create a separate window. One reason is to more easily see the data in the widget.

1) Click on the little curved arrow in the upper right-hand corner of the widget.

2) You may have to drag the widget into the center of your screen. Click on the grey bar at the top of the widget and drag.

3) Click on the square in the upper right corner of the widget to enlarge it to full-screen.

4) To pop the widget back into your Home Console, click the curved arrow again.
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Use the Refresh Button to Update Data in a Widget

The Refresh Button: Many widgets (and charts) have a refresh button that you will need to click to update the widget. If you have made changes to any of the data displayed in a widget, you won’t see it until you have clicked the refresh button. You will also find the refresh button in your client charts. If you write a progress note or fill out another type of form in Avatar, you won’t be able to see it in the chart until you click the refresh button. Charts also have this refresh button.

How to Reset Widgets

If you have made changes to the layout of your widgets on your Home Console, or in Charts, and want to return to the default layout, do the following:

1) On your Home Console, on the right side of the menu bar, up at the top of the page, click on the little checkerboard icon as shown below. This takes you to an area where you can reset your widgets to your default layout.

Assessments are used to evaluate the status of a client’s mental health, their level of functioning, daily habits and behaviors. Assessments document a client’s condition, and is an understanding of how client events or behavior relate to precipitating factors, previous behavior, and other events in the client’s life. In the Comprehensive Biopsychosocial Assessment, some questions are required and others are optional, although you are strongly encouraged to answer as many questions as possible, including those that are optional. Questions in red are required to finalize and submit the form.

Click Reload Home View and then Apply to restore the widgets to their default layout.
Forms & Data Widget

This Widget allows you to access forms in Avatar. There are several ways to search for forms using this Widget.

My Forms: Here, you will see a list of forms that have been assigned to you, based on your Role. This is a list of forms that you will likely use most often, but it does not include all forms you can use. See below for information on how to add a form to this list using the Edit feature.

Recent Forms: If you have recently opened a form, it will appear in Recent Forms. Recent forms will reset upon logout.

Browse Forms: Click on Browse Forms to see a list of forms sorted by categories. Search for PM forms in "Avatar PM."

Search Forms: You can also use the Search Forms box to find forms. Once you start typing, the matching forms will display dynamically. Forms may not display based on what you think the naming convention is. Type a part of what you expect the form to be called and filter the results.
PM FORMS

There are various Practice Management (PM) forms that are used to place a client into an appropriate program for treatment. The following is a list of the PM forms that can be used to ensure that all pertinent client information is collected, verified and used by Mirmont Behavioral Health staff in the most effective and appropriate manner.

1) **Pre Admit Form** – Used to Pre Admit a client in Avatar. New clients are assigned a unique client ID# and this number can be used to search for the client within the Avatar system.

2) **Pre Admit Addendum Form** – Used by the Call Intake and Mirmont Admissions staff to obtain enough clinical information to schedule the client to the appropriate program.

3) **Current Legal Status Form** – Used to determine if the client has any legal status information that is needed to assist with the client’s treatment plan.

4) **Admission Referral Information Form** - Used to collect and track all referral information regarding a client’s admission.

5) **Client Contact Information Form** - Used to add emergency and next of kin contact information to the client’s record. The system will allow for multiple contacts per client record.

6) **Financial Eligibility Form** – Used to enter and verify a client’s guarantor coverage (insurance coverage) into the client record.

7) **Managed Care Authorizations Form** – Used to obtain and enter all authorizations for treatment into the client record. This form allows the end user to add authorizations for multiple guarantors and/or for multiple services under a single guarantor.

8) **Scheduling Calendar Form** – Used to schedule client appointments (singular and group).

9) **Consent To Treatment Mental Health Form** – Used for clients who are entering into any one of the Mirmont Behavioral Health, Mental Health Programs. This consent is an online document that requires an Esignature for completion.

10) **Consent to Treatment Substance Use SUD Form** – Used for clients who are entering into any one of the Mirmont Behavioral Health, Substance Use Programs. This consent is an online document that requires an Esignature for completion.

11) **Bed Reservation Form** – Used to reserve a bed for a client who is expected to be admitted to the Mirmont Inpatient facility.

12) **Admission Form** – Used to update a Pre-Admit into an Inpatient Admission. This form also requires that the client is assigned to an appropriate program and bed/unit/wing during the inpatient stay.

13) **Change Program/Admission Form** – Used to change either a program or admission date when needed. This form can be used if a client has been admitted to a program with the MLH Pre Admit program as the default and the client must be assigned to a valid program.
14) **Bed Assignment Form** – Used to assign a client to a bed. It can also be used to change a bed reservation made for the client in question.

15) **Admission (Outpatient) Form** – Used to update a Pre-Admit into an Outpatient Admission.

16) **Update Client Data Form** – Used to perform any demographic and/or Pre-Admit updates needed based on input from the client or other reliable source.

   **NOTE:** If guarantor updates are required (new/different insurance coverage for the client) the **Financial Eligibility** form will need to be invoked to make any necessary changes/additions.

17) **Front Desk Form** – This form will allow the end user to either check-in and/or checkout a client and collect any Time of Service (TOS) payments using the Elavon system.

18) **Self-Pay Payment Arrangement Form** - Used to create a self-pay payment plan for a client.

19) **Individual Payment Posting Form** – Used to post client payments for a specific client visit where services were already rendered.

20) **Quick Cash Posting Form** - Used to post client payments for a specific client visit where services were already rendered.

21) **Coming In Today Widget** - Used to post Time of Service (TOS) payments while checking a client in for his/her appointment.

22) **Program Transfer Form** – Used to transfer a client from one program to another during the same admission period (e.g. a client starts as an inpatient for **Detox** for a limited time and is downgraded to a lesser program such as **Rehab**).

   **NOTE:** A client cannot be transferred from an inpatient admission to an outpatient admission. In this case, a client must be discharged from the inpatient admission first and then added to an outpatient program by being admitted to the outpatient program.

23) **Pre Admit Discharge Form** – Used to discharge any pre admit encounters that have not been updated to an Admission status within the last 30 days.

24) **Client Document Capture Form** – Used to scan insurance cards and official client ID information against the client’s chart.

25) **Delete Last Movement Form** – Used to “undo” or delete the last transaction performed by an end user. For example, if a client was discharged incorrectly, the user would utilize the **Delete Last Movement** form to “void” the discharge.
Pre Admit Form

The following is a step-by-step process for completing the Pre Admit form:

1) Enter Pre Admit in the Search Forms field of the Forms & Data widget.
2) Double-click Pre Admit from the search results.
3) Enter a new client’s relevant information in the Last Name and First Name fields of the Select Client window. You must enter at least 3 pieces of data before the “Search” criteria becomes available.
4) Click the down-arrow in the Sex field to reveal a drop-down menu. Select either Male, Female or Unknown.
5) Single-click the Search button. The system will provide a box with: No Matches Found.
6) Press <OK> and click on the <New Client> button. The system will open the Pre Admit form.

**Note:** All fields that are highlighted in RED are **required** fields and will not allow you to submit a form unless these fields are completed.

7) The **Client Name** field is auto-populated based on the information entered in the Select Client window. Make any necessary changes.

8) Single-click the <T> button in the **Preadmit / Admission Date** field. This will autofill in today’s date.

9) Single-click the <Current> button in the **Preadmit / Admission Time** field. This will autofill the current time.

10) Click the down-arrow in the **Program** field to reveal the drop-down menu. Choose the only selection: **MLH Pre Admit**.

11) Click the down-arrow in the **Type Of Admission** field to reveal the drop-down menu. Single-click the appropriate item. Select: **Pre Admission**.

12) **Enter** the appropriate date in the **Expected Date of Admission** field.

13) Select the radio button corresponding to either **Yes** or **No** in the **Ever A Client In This Hospital?** field.

14) Enter the relevant information in the **Employer** free-text field.

15) Select the relevant choice in the drop down menu in the **Primary Reason for Seeking Treatment**
16) In the **Reason for Seeking Services Comments** section, enter any relevant information that will assist with assigning the patient to the relevant program.

17) Click the down-arrow in the **Current Resident Code** field to reveal the drop-down menu. Single-click on the appropriate item selected.

18) Click the down-arrow in the **Homeless Indicator** field to reveal the drop-down menu. Single-click on the appropriate item selected.

19) Select the radio button corresponding to either **Yes** or **No** in the **Veteran** field.

20) Once all provided information is entered, move to the **Demographics** section by clicking on the hyperlink on the left side of the form.

21) The **Client’s Address – Street** field is a free-text field. Enter the first line of the client’s street address. If the client has an Apartment or other pertinent address information, it can be added on the **Client’s Address – Street 2** field.

22) In the **Client’s Address – Zipcode** field, enter the client’s ZIP code in either 5 or 9 digit format. This step will automatically populate the City and State fields.

23) If the client’s ZIP code is unknown, free-text can be entered in the **Client’s Address – City** field.

24) If the client’s ZIP code is unknown, the county can be selected in the **Client’s Address – County** field by clicking the down-arrow to reveal the drop-down menu. Single-click the correct county.

25) If the client’s ZIP code is unknown, the state can be selected in the **Client’s Address – State** field by
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clicking the down-arrow to reveal the drop-down menu. Single-click the correct state.

26) The **Client’s Home Phone** field is a formatted free-text field. Enter the client’s home phone number.

27) The **Client’s Work Phone** field is a formatted free-text field. Enter the client’s work phone number.

28) The **Client’s Cell Phone** field is a formatted free text field. Enter the client’s cell phone.

29) The **Client’s Email Address** field is a free text field. Enter the client’s email address.

30) In the **Communication Preference** field select the radio button corresponding to the way the client prefers to be contacted.

31) In the **Marital Status** field, select the correct choice from the drop down menu.

32) In the **Primary Language** field, click the down-arrow to reveal a drop-down menu. Single-click the applicable selection.

33) In the **Client Race** field, click the down-arrow to reveal a drop-down menu. Single-click the applicable selection.

34) In the **Ethnic Origin** field, click the down-arrow to reveal a drop-down menu. Single-click the applicable selection.

   **NOTE:** If the client’s **Primary Language** and/or **Race** and/or **Ethnic Origin** is unknown or not obtained, the end user must check the appropriate box(es) in order to Submit the PREADMIT Form.

35) In the **Religion** field, click the down-arrow to reveal a drop-down menu. Single-click the applicable selection.

36) The **Place of Birth** field is a free-text field. Enter the client’s place of birth.

37) In the **Country of Origin** field, click the down-arrow to reveal a drop-down menu. Single-click the applicable selection.

38) In the **Education** field, click the down-arrow to reveal a drop-down menu. Single-click the applicable selection.

39) In the **Employment Status** field, click the down-arrow to reveal a drop-down menu. Single-click the applicable selection.

40) Under the **Alias Section**, add the **Preferred Name** of the client. If the client does not have a **Preferred Name**, enter the patient’s full name in this field.

41) In the **Gender Identity** field, click on the down arrow and choose the appropriate option.

42) In the **Alias 2** field, enter a third alias the client may have, if applicable.

43) In the **Sexual Orientation** field, click on the down arrow and choose the appropriate option.
44) In the **Alias 3** field, enter a fourth alias the client may have, if applicable.

45) In the **Alias 4** field, enter a fifth alias the client may have, if applicable.

46) The **Pregnancy** related section of the **Pre Admit Form** should be completed for female patients if applicable.

47) Under the Pregnancy section, choose either **<Yes>** or **<No>** to the question: Are you pregnant?  
*NOTE:* If **<Yes>** is chosen to the **Are you pregnant?** Question, the remainder of the pregnancy related questions should be answered.

48) In the **Clinical Summary Section(s)** enter any relevant clinical information that will assist in placing the client into the appropriate program. All sections are free-text.

49) In the **Comments Section**, enter any Pre-Admit comments that can aid in the overall care of the client.
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Pre Admit Addendum Form
The following is a step-by-step process for completing the Pre Admit Addendum form:

1) Highlight the correct client in the Recent Clients section.
2) Enter Pre Admit Addendum in the Search Forms field of the Forms & Data widget.
3) Double-click Pre Admit Addendum from the search results. The system will open the Pre Admit Addendum form.
4) In the Addendum Date field, enter T for today.
5) Under the Who Referred You section, click on the appropriate response.
NOTE: Choosing Agency/Organization automatically provides the user with a hyperlink on the left side of the screen to access the Admissions Referral Information Form to complete all relevant fields. Choosing <OK> to the Window below, will automatically place the user into the Admissions Referral Information Form.

6) Choosing <Other> automatically requires the user to complete the Specify Other field.
7) Click on the Suicide Thoughts/Plan/Attempts hyperlink.

8) Under the Have you had suicidal thoughts within 72 hours? Question, enter the correct answer <Yes> or <No>. If you answer <Yes>, the If Yes, Describe section must be completed. It is a free text section.

9) Under the Have you ever had suicidal thoughts? Question, enter the correct answer <Yes> or <No>. If you answer <Yes>, the If Yes, Describe section must be completed. It is a free text section.

10) Under the If yes, do you have a plan? Question, enter the correct answer <Yes> or <No>.

11) Under the Have you ever attempted? Question, enter the correct answer <Yes> or <No>.

12) Under the Do you have access to firearms? Question, enter the correct answer <Yes> or <No>. If you answer <Yes>, the Firearms Comments section must be completed. It is a free text field.

13) Under the Have you ever cut, burned or injured yourself for reasons other than to end your life? Question, enter the correct answer <Yes> or <No>. If you answer <Yes>, the next four questions become required fields for completion:
   a. Method?
   b. How often?
   c. Most Recently?
   d. Did you receive medical attention?
14) Under the History of Violence/Trauma section, complete the question: “Have you had thoughts of harming others?” by answering <Yes> or <No>. If <Yes> is selected, the If Yes, Explain section is a required section for completion.

15) Under the In general or someone specific section, choose either <General> or <Someone Specific>. If <Someone Specific> is selected, enter the person(s) name under the Identify section.

16) Under the Explain section, complete any relevant information regarding this client’s circumstances.

17) Under the Any history of an event that you would consider emotionally/psychologically/physically traumatic? Section, choose either <Yes> or <No>. If <Yes> is chosen, the If Yes, Explain section is required for completion.
18) Click on the **Substance Use** hyperlink to complete this section.

19) Under the **Substance Use** section, click on the **<Add New Item>** selector. The system will add a green bar to the **Substance Use** section and allow for the user to choose the correct option.

**NOTES:**

a. This is a multiple iteration table. Each time you add an item, the system will create a new row. This process allows the user to add multiple items within this table.

b. If additional substances need to be selected, follow the above mentioned step to add each item to the **Substance Use** section.

c. If **<Other>** is selected under the **Substance Use** section, the **Specify Substance** field is required for completion.

d. Each substance added, requires the completion of the following required fields:
   1. Amount
   2. Frequency
   3. Route of Administration
   4. Date of Last Use
20) Click on the **Previous Treatment** hyperlink to begin completion of this section.

![Previous Treatment Section]

21) Under the **Previous Treatment** section, click on the **<Add New Item>** selector. The system will add a green bar to the Previous Treatment section and allow for the user to choose the correct option.

![Additional Previous Treatment Section]

**NOTES:**

a. If additional treatment facilities need to be selected, follow the above mentioned steps to add each facility to the **Previous Treatment** section.

b. For each facility added to this section, the following fields must be completed for each added facility:
   1. Level of Care
   2. Dates
   3. Type (of care received)
   4. Completed (Yes/No)
22) Under the Level of Care section, choose the correct Level of Care.
23) Next to the Date field, add all relevant dates for the facility selected.
24) Under the Type section, make the correct selection for the facility entered.
25) Under the Completed question, Choose either <Yes> or <No>. If the answer is <No>, the If No, Specify Reasoning is a required section to be completed.
26) Click on the Withdrawal Symptoms hyperlink to complete this section.

![Withdrawal Symptoms](image)

27) Under the Are you experiencing any of the following withdrawal symptoms? Section, choose the response(s) applicable to the client.

**NOTE:** If <Other> is chosen, the If Other, Specify field is a required field to complete.

![Additional Referral Information](image)

28) Click on the Additional Referral Information hyperlink to complete this section.
29) Under the If referred from another facility – Clinical Documentation requested? Section, select <Yes> or <No>.

**Note:** If <Yes> is selected, the By Whom field becomes a required field to complete.
30) Under the Determination section, make the appropriate selection for the client. If <Other> is chosen, the Specify Other field becomes a required field for completion.
31) Under the Admission Referral Comments section, complete this free-text section as needed.
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32) For the Draft/Final section, the following will occur:
   a. **Admissions at Mirmont**: Always choose <Draft> as the response. Change from <Draft> to <Final> once the client arrives for the Intake Evaluation appointment and any necessary changes are made to the Pre Admit Addendum form.
   b. **Call Intake Area**: Always choose <Final> as the response since this section will be completed for Outpatient Pre Admit visits only.

**Note**: If <Draft> is chosen when submitting this form, the system will create a “to do” task for someone within Admissions to follow-up to review and “Finalize” this form.
Current Legal Status Form

1) Highlight the client you are working with and enter **Current Legal Status** in the **Search Forms** field of the **Forms & Data** widget.

2) Double-click **Current Legal Status** from the search results.

3) The system will begin to open the Current Legal Status Form by first displaying all episodes for the selected client.

4) Choose the correct client episode and click **<OK>**.
5) Under the **Assessment Date**, click <T> for today’s date.

6) Under the **Assessing Practitioner** section, choose the appropriate practitioner for the site where the client will be treated.

7) Under the **Effective Date of Legal Status**, either click <T> for Today, <Y> for Yesterday or enter the appropriate date of the client’s Legal Status.

8) Under the **Effective Time of Legal Status**, either click on the <Current> tab or manually enter the appropriate time for this client’s legal status.

9) Under the **Legal Status** section, click on the relevant box that describes the client’s type of Legal Status.

   **NOTE:** If <Other> is selected, the system will you to complete the If Other, Specify field.

10) Under the **Expiration Date of Legal Status**, enter the correct expiration date, if known.

   **NOTE:** If a future date is entered, the system will prompt the user to confirm that a future date is correct. If a future date is correct, click <OK> otherwise click <Cancel> to enter a correct expiration date.

11) Under the **County/State of Legal Issue**, click on the drop down menu and make the appropriate selection.

12) Under the **Is there a warrant out for your arrest?** Section, choose either <Yes> or <No>.

13) Under the **Can you Leave your County or State?** Section, choose either <Yes> or <No>.

14) Under the **Current Legal Charges** section, enter any relevant free-text information for this client’s record

15) Under the **Legal Charges Pending** section, choose either <Yes> or <No>.

16) Under the **Probation/Parole Officer Name** section, enter the name of the probation/parole officer’s name if relevant.

17) Next to the **Phone#** field, enter the phone number of the probation/parole officer if possible.
18) Under the **Legal Charges Specific** section, enter any relevant free text information regarding this client’s legal status.

19) Under the **Judicial Review of Release** section, choose either **<Yes>** or **<No>**.

20) Under the **Court Date** field, either click **<T>** for Today, **<Y>** for Yesterday or enter the appropriate date of the client’s Court Date.

   **NOTE:** If a future date is entered, the system will prompt the user to confirm that a future date is correct. If a future date is correct, click **<OK>** otherwise click **<Cancel>** to enter a correct expiration date.

21) Under the **Type of Court** section, click on the drop down menu and make the appropriate selection.

22) Under the **Current Legal Status Comments** section, enter any relevant free text information regarding this client’s legal status.

23) Under the **Draft/Final** section choose either **<Draft>** or **<Final>** based on departmental policy.
Admission Referral Information Form

The following is a step-by-step process for completing the Admission Referral Information form:

1) **Enter Admission Referral Information** in the Search Forms field of the Forms & Data widget.
2) Double-click **Admission Referral Information** from the search results.
3) Enter the client’s relevant information in the Last Name field of the Select Client window.
4) In the Results section, the system will provide the user with a list of clients who potentially match the search criteria. Highlight the correct client. Click on the <Select> tab.

5) The system will display the episode(s) to choose from. Highlight the Pre-Admit episode that requires the Admission Referral Information and click <OK>.
6) The system will automatically open the Admission Referral Information form to be completed.
7) Under the Primary Referral Source Code field, either enter the Name of the Referral or enter a few letters of the Name of the referral. The system will provide a list of Referrals to choose from.

**NOTE:**
If the Admission Referral is stored in the system with comprehensive information, most, if not all, fields will be completed by the system.
Minimally, the following fields are auto populated based on the Admission Referral Information entry stored in the Admission Referral Information table:
- Primary Referral Source Category
- Primary Referral Source Specialty

8) Under the Primary Referral Source Phone field, enter the telephone number if known.
9) Under the Primary Referral Source – Agency field, enter the name of the Agency that referred the client.
10) Under the Primary Referral Source Street Address field, enter the address if known.
11) Under the **Primary Referral Source Street Address** field, enter the address if known.

12) Under the **Primary Referral Source Zip** field, enter the zip code for the Referral entity.

**NOTE:** If the zip code is known and entered into the system, the following fields will be auto-populated with correct information:
- Primary Referral Source – City
- Primary Referral Source - County
- Primary Referral Source - State

13) Under the **Primary Referral Source – Contact** field, enter a contact name if known.
Client Contact Information Form

1) Enter **Client Contact Information** in the Search Forms field of the Forms & Data widget.
2) Double-click **Client Contact Information** from the search results.
3) Enter the client’s relevant information in the Last Name field of the Select Client window.
4) In the Results section, the system will provide the user with a list of clients who potentially match the search criteria.
5) Highlight the correct client.
6) Click on the **<Select>** tab.
7) The system will automatically open the **Client Contact Information** form to be completed.
8) The Client information will appear and should be reviewed to ensure that the correct client has been chosen.

9) **<Click>** on the Contact Information hyperlink.
10) Under the **Household Contact Information** section, click on the **<Add New Item>** tab.

11) Under the **Name** field, enter the primary contact information for the client.

12) Under the **Preferred Language** section, enter the preferred language of the Contact person.

13) Choose either **<Yes>** or **<No>** for the following fields:
   a. Interpreter Needed?
   b. Does Contact live with Client?
   c. Is the Individual a Dependent?

14) Enter all **Work/Home/Cell** phone information for the Client Contact.

15) Under the **Address Information** section, enter the Client Contact address information.
16) Under the **Comments/Special Instructions** section, enter any relevant comments/instructions regarding the client’s episode.

**NOTE:** This form allows users to enter multiple client contacts if needed and allows users to edit existing client contact information if needed.
Financial Eligibility Form

1) Enter **Financial Eligibility** in the Search Forms field of the Forms & Data widget.
2) Double-click **Financial Eligibility** from the search results.
3) Enter the client’s relevant information in the **Last Name** field of the Select Client window.
4) In the Results section, the system will provide the user with a list of clients who potentially match the search criteria.
   - Highlight the correct client.
   - Click on the `<Select>` tab.
5) Highlight the correct episode where financial eligibility information needs to be entered and click `<OK>`.
6) Click on the **Guarantor Selection** hyperlink.
7) Notice that every client’s file will already be loaded with the Self-Pay Guarantor.

8) If the client is a self-pay client (no insurance coverage) you can press <Submit> to complete this process.

9) If the client has primary insurance other than self-pay, add the primary coverage and then prioritize the guarantor coverage as the primary coverage and the self-pay guarantor as the secondary coverage.
10) Click on the <Add New Item> tab to add a guarantor other than <Self>. Choose the correct guarantor. Aetna Behavioral Health was chosen for this client. The system will automatically populate the following fields:

- Guarantor Name
- Address line 1 and 2 if applicable
- Zip code
- City, State
- Guarantor phone number

11) Under the Guarantor Plan section, system will automatically make the correct selection.

12) Under the Customize Guarantor Plan section the choices are <Yes> or <No>.

**NOTE:** Only select <Yes> if Real-Time eligibility has been run and the eligibility response has provided the information needed to complete the Customize Plan section.

13) Ignore the Inhibit Billing by Mail section.

14) Under the Is this a Managed Care Contract section, choose either <Yes> or <No>.

15) Under the Effective Date of Contract and Expiration Date of Contract section, complete this
section ONLY if the accurate dates are known.

16) Ignore the Insurance Code/Medicaid Tape section.

17) Under the Eligibility Verified section, ALWAYS choose <Yes>.

18) Under the Coverage Effective Date and Coverage Expiration Date section, complete with accurate information. The Coverage Effective Date field is required.

19) Under the Subscriber section, click on the drop down menu to complete the Client’s Relationship to Subscriber field.

NOTE: If <Self> is selected, the following fields are auto populated with the client’s information stored in the Pre-Admit/Admissions Form:

- Subscriber Name
- Subscriber Address
- Subscriber City, State
- Subscriber Zip Code
- Subscriber Address – County
- Subscriber Home Number
- Subscriber Work Number
- Subscriber Date of Birth
- Subscriber Sex

20) Under the Subscriber Military Status field, click on the drop down menu to make the appropriate selection.

21) Under the Subscriber Branch/Service field, click on the drop down menu to make the appropriate selection.
22) Under the **Subscriber’s Employer** section, complete the following fields if known:

- Subscriber Employee ID#
- Subscriber Employer Name
- Subscriber Employer ID Number
- Subscriber Employer Address - Street
- Subscriber Employer Address - Zip
- Subscriber Employer Address - City
- Subscriber Employer Address - State
- Subscriber Employer Address – County
- Subscriber group Name

**Note:** The Subscriber’s Employment Status is auto populated from the Pre-Admit/Admissions Form if completed during the Pre Admit/Admit process.

23) Under the **Subscriber’s Employer** section, complete the following fields:

- Subscriber Group Number - if known
- Subscriber Policy Number

**NOTE:** The **Subscriber Policy #** is required for eligibility checking and for claim form billing. This field MUST be completed.

24) **Always** leave the following fields Blank:

- Subscriber Medicare #
- Subscriber Medicaid #

If the client has coverage with Medicaid, **ALWAYS** enter the Medicaid Recipient Number in the Subscriber policy # field.
25) Under the **Subscriber’s Benefit** section, complete the following fields:

- Subscriber Assignment of Benefits – **ALWAYS** answer *<Yes>*
- Coordination of Benefits - **ALWAYS** answer *<Yes>*

26) Under the **Subscriber’s Benefit** section, **ONLY** answer the **Date of Accident** field if the client’s treatment is due to an accident-related incident.

27) Under the **Subscriber’s Benefit** section, **ONLY** answer the Date Benefits Terminated field and the Date Benefits Denied field if valid for this episode of care.

**NOTE:** If a date is entered for the Date Benefits Denied field, under the Denial Code field, click on the drop down menu and select the appropriate denial code.

28) Under the **Subscriber’s Covered Days/Maximum Covered Dollars** section, please note that these field are already auto-populated with data. **DO NOT touch these fields or make any changes!**

**NOTE:** Leave the following fields **BLANK:**

- Number of Days for Interim Billing
- Lifetime Reserve Days

29) **NOTE:** The only remaining section to complete is the **Subscriber Release of Info** section. The appropriate response should always be:

*<Informed Consent to Release Medical Info>*

30) Click on the **Customize Plan** hyperlink.

**NOTE:**
Any fields on this screen should be completed ONLY when insurance coverage has been verified and the eligibility response provides specific information to complete any fields on this screen. The Covered Charge Categories section must be completed. Select the appropriate categories based on the eligibility response received.
31) Click on the **Financial Eligibility** hyperlink.
NOTE: Prior to Submitting the Financial Eligibility form, the user must click on the Financial Eligibility hyperlink and pull in the Guarantor(s) submitted for eligibility checking in the appropriate billing order (if more than one Guarantor has been added). Make sure that the Self-pay guarantor is slotted in the correct priority order.

Coverage Comments should be entered at this time from the link used to verify the client’s coverage (Passport or Experian). This section will be used to enter co-pay information, co-insurance information or any other pertinent information needed to ensure that the client’s coverage information is stored in Avatar.
Managed Care Authorizations Form

1) Enter Managed Care Authorization in the Search Forms field of the Forms & Data widget.

2) Double-click Managed Care Authorization from the search results.

3) Enter the client’s relevant information in the Last Name field of the Select Client window.

4) In the Results section, the system will provide the user with a list of clients who potentially match the search criteria.
   - Highlight the correct client.
   - Click on the <Select> tab.

5) Highlight the correct episode that will be updated and click <OK>.

6) On the left hand side of the screen double click on the Managed Care Authorization Data hyperlink.

![Managed Care Authorization Form Image]
7) Under the **Managed Care Authorization History** section, click on the `<Add New Item>` button.

8) Under the **Guarantor Number** section, click on the relevant guarantor where an authorization will be obtained.

9) The client must already have a guarantor(s) assigned to the episode where the authorization will be obtained.

10) Add the authorization number under the **Authorization Number** field for the client’s episode.

11) Under the **Authorization Start Date** field, enter the appropriate start date.

12) Under the **Authorization End Date** field, enter the appropriate end date.
13) Under the **Service Code(s)** section, choose all relevant service codes that are covered by this authorization.

14) Next to the **Type of Authorization** field, click on the drop down menu and make the appropriate selection.

15) Under the **U/R staff Person** section, enter your name in this field.

16) Under the **Next Authorization Review Date** section, enter the next date where this episode needs review for authorization.

**NOTE:** It is important to complete this field when possible. The system will automatically provide a report to allow the appropriate end users know when further authorizations are needed in advance of the next scheduled visit.
**Scheduling Calendar Form**

**Individual Appointment**

1) Under the **Recent Clients** section, click on the client that needs an appointment.

2) Enter **Scheduling Calendar** in the Search Forms field of the Forms & Data widget.

3) Double-click **Scheduling Calendar** from the search results. The system will automatically take the user to the **Scheduling Calendar** Form. See Below:

4) The Scheduling Calendar can be individually designed based on the user’s needs.

**Example:**

The user can change the view to display:

- Day
- Week
- Month
5) Under the **Site/Team** section, select the practitioner that will treat this patient. The system will adjust the calendar to reflect only that practitioner’s schedule for the timeframe requested (Daily/Weekly/Monthly). See Below:

![Calendar Image]

**Note:** The schedule for this practitioner has days that are “grayed out” to signify that this practitioner is not available on those days.
`NOTE: The example below is a screen shot for the site = Mirmont Outpatient Treatment Center Broomall. And the Provider selected = Dr. Izzo."
6) When a particular appointment “type” must be made, e.g. psychiatric evaluation, for a specific provider, you must look for an open slot for that appointment “type” under the specific provider’s schedule. You can see the “open slot appointment type” since there is no client already assigned to this slot.

7) Right click on that slot and select <Details/Edit>. The system will open the appointment screen.
8) The following fields will automatically be completed by the system:

- Appointment Site
- Appointment Date
- Appointment Start Time
- Appointment End Time
- Appointment Duration (based on start and end times)
- Service Code – **This must be updated with the correct service code**
- Appointment Status
- Recurrence Schedule – Defaults as “Once”
- Practitioner
- Program
- Location
9) The following fields must be edited/completed:
   - Service Code – edit the existing code to reflect the correct billable service code. (Notice the NEW Service Code entered)
   - Enter the client’s name in the Client field.
   - Choose the correct Episode in the Episode Number field.

10) Click <Submit> to file the appointment.
11) The new appointment screen will display the slot with your client's name! See below:
**PHP Group Appointments**

1) In order to schedule PHP group appointments, you must first open the *Group Member Assignment* form.

2) Under the **Recent Clients** section, click on the client that needs the PHP appointments.

3) Enter *Group Member Assignment* in the Search Forms field of the Forms & Data widget. See below:

   ![Image of the Groups & Data widget]

4) Double-click *Group Member Assignment* from the search results. The system will automatically take the user to the client’s list of episodes.
5) Select the correct episode if more than one exists. Otherwise choose the episode displayed.
6) The Group Member Assignment screen will display.
7) Under the Group Assignment Start Date field, enter the date when the client is willing to start in the program.
8) Enter MH PHP in the Select Group field. The following screen will be displayed:

9) Each site that offers a PHP group program, has a set of 5 daily sessions comprising the **Daily Group Session**.
NOTE: The list for each site:

**Broomall/Exton**
- MH PHP Community (90)
- MH PHP Check In (A or B) (80) or (111)
- MH PHP Open/Skill (A or B) (91)
- MH PHP Topic/Skill (83)
- MH PHP Wrap-up (84)

**NOTE:** Entering the number next to the appointment “type” is easier than performing a look-up in Avatar.

**WEWC**
- No PHP Group Scheduling

**Media**
- SUD PHP Check-In (92)
- SUD PHP Holistic (93)
- SUD PHP Process (94)
- SUD PHP Lecture (95)
- SUD PHP Wrap-up (110)

**NOTE:** Entering the number next to the appointment “type” is easier than performing a look-up in Avatar.

10) For example, if your client has agreed to start the SUD PHP program in Media, you will enter `<SUD PHP Check In>` under the Select Group field.
11) You will double click on the **SUD PHP Check In** session and this session will drop into the **Selected Group(s)** slot. See Below:

12) Add the remaining 4 sessions for the **SUD PHP Daily Group Session**. The **Selected Group(s)** slot will look as follows:
13) Do not enter a date in the Group Assignment End Date field.

14) Click <Submit> to file your client’s group appointments.

15) The following message will appear:

16) Answer <Yes> to the question above. The following screen will be displayed:
17) Once you have viewed the client’s group session appointments, you can click on the HOME tab at the upper left corner of the screen to go back to your HOME page.
IOP Group Appointments

1) In order to schedule IOP Group appointments, you must first select the site and then find the provider who will run the group that is recommended for your client. See example below: The site is OP Broomall and the provider is Krystal DeFeo. Notice the appointment slots already created for the IOP Groups in Broomall.
2) Right Click on the date that your client will start the IOP Group sessions.

![Scheduling Calendar](https://via.placeholder.com/150)

3) Select *<Details/Edit>*. The following screen will display:

![Scheduling Calendar - Appointment Details](https://via.placeholder.com/150)

4) Select *<The Series>*. The system will open the scheduling calendar to begin making the appointment.
5) On the left hand side of the screen, click on **<Group Members>**.

6) The following screen will be displayed:

7) Choose **<Add>** to assign your client to the group.

8) Enter your client’s **Name** or **ID number**. The system will, either drop in the episode if the client has just one episode, or if there is more than one episode for your client, you will choose the correct episode from the list that appears. **See above.**
9) Click on **<Update Members>** at the bottom left portion of the screen.

10) The following screen will be displayed with your client’s **Name** added to the Group.

11) Click **<Submit>** to add the client to the group appointment.
12) To validate that the appointments were made, you can click on the <Find Existing Appointments> hyperlink on the bottom left hand side of your screen. See below:

13) The Search Appointments screen will need to be completed with the Practitioner’s Name, Client’s Name, Start Date and check off the Search Days of Week section if desired. Click <Find Appointment>. See Below:

14) The following screen will display the next 10 IOP appointments for the client. Notice that every displayed appointment is for the next 10 “Monday” IOP Group Therapy appointments:
15) All scheduled IOP Group Therapy appointments do not contain an End Date. To verify that appointments for client: Me, Happy keep going out on the calendar, you can perform the steps above by clicking on the Find Existing Appointments hyperlink again and enter the same data with a new start date = 06/11/18. The following screen will be displayed:
16) To ensure that your client is scheduled for the **3 days per week IOP Group Therapy** sessions, you must go into the **Scheduling Calendar** and perform the same steps (Right Click on the appointment date and choose `<Details/Edit>` for the **Wednesday IOP Group Therapy** sessions and for the **Friday IOP Group Therapy** sessions. See Below:
Wednesday Sessions:

17) Please see the following screen after right clicking on the calendar for dates = 040418 for Practitioner, Krystal Defeo and clicking on the Group Members hyperlink to add the client to the IOP Group Therapy.
18) Click on the **Update Members** tab and the client is added to the **Current Group Appointment Members** box.

Friday Sessions:

19) Complete the same steps as you did for the Wednesday **IOP Group Therapy** appointments.

20) Click on the **Find Existing Appointments** hyperlink to verify that the Monday, Wednesday, and Friday **IOP Group Therapy** appointments have been scheduled. Remember, this function will only show the next **10 appointments** scheduled for your client. See outcome below:
The client is now scheduled for all **IOP Group Therapy** sessions 3 times per week with no **End Date**.
Cancelling Appointments

In order to cancel appointments in Avatar, take the following steps:

1) Look for an appointment “type” slot that is the same as the appointment that you need to cancel.

2) Right click on that slot and paste it onto the Day/Time where you need to cancel the client’s appointment. This will provide a NEW open slot for the practitioner to see another client.

3) Right click on the appointment that you wish to cancel. You will see the client’s name in that appointment slot.

4) Choose <Status Update>. See screen below:
5) Click on the drop down menu and choose <Cancelled> to cancel the appointment.

6) Under the Confirmed slot, click the Yes box.

7) Under the Missed Visit slot, click on the Yes box.

8) On the Missed Visit Service Code drop down menu, choose <cancelled>. See below:
9) Notice the field completed for appointment status.

10) Notice the field completed for Missed Visit Service Code.

11) Enter any relevant comments on why the appointment was cancelled.

12) Click <Submit> to file your actions.
Main Line Health Behavioral Health

Consent to Treatment Mental Health Form

1) Choose the correct client under the Recent Clients section.
2) Enter Consent To Treatment Mental Health in the Search Forms field of the Forms & Data widget.
3) Double-click Consent To Treatment Mental Health from the search results.
4) The system will automatically open the Consent To Treatment Mental Health form for the end user.

5) Under the Consent Date field, enter Today’s date.
6) Next, choose the correct program that the client will be a participant.
7) Under each box for the Consent to Treatment form, you will double right click and a box will appear. Double right click within the name of the box as shown below (Client Rights and Responsibilities).

**NOTE:** There are 15 boxes (sections) that must be completed.
8) Under the **Advanced Directive** section, complete this section based on the client’s responses.

**NOTE:** If <Yes> is selected, the system will require you to answer the following questions:
- I Have a Living Will. If yes, was a copy provided?
- I Have a Health Care Power of Attorney. If yes, was a copy provided?
9) Under the **Voicemail Messages** section, make the correct selections based on the client’s responses.

**NOTE:** If the client answers **<Yes>** to the question: *May we leave a message on your voicemail or answering machine?* The client must provide a telephone number and type of phone.
10) The remaining section contains required fields that must be completed with a <Yes> as acknowledgement from the client.

11) Once this form has been completed, request the client to sign the Consent Form. You MUST sign the Consent as the Witness and must have completed the Printed Name of Witness field. **NOTE:** Please remember to inform the client that he/she can review the laminated version of the Consent form prior to signing.

12) The Signature Date should always = Today’s Date and the Signature Time should always = Current Time.

13) Under the “I have been offered a copy of this document and I have” section, check either <Accepted> if the client requests a printed copy or <Declined> if the client does not wish a copy of the Consent document.

14) Always click <Final> once this document has been completed before clicking on the <Submit> tab.
15) If the client requests a copy of the **signed** Consent form, the following steps need to take place:
   a. Click on the `<HOME>` tab in the upper left corner of the screen.
   b. Under the **Recent Clients** section, double click on your client’s name.
   c. The system will take you to the **Chart View**. See Below:

   ![Chart View](image1)

   d. Click on the “**White Folder**” icon to the left of the **OVERVIEW** word. The screen below will be displayed:

   ![Chart View](image2)

   e. Click on the green cross to open up and create a Group for the forms you will need to use every day. The following screen will display:
f. Enter: Admissions as the “group”. The following screen will display:

g. Click on the folder with the green cross to add forms to this “Admissions” group.
h. The following screen will display. Add the Consent Forms to the Admissions Group.

i. Next to the Search Forms: section, enter: Consent To Treatment.

j. Double click on the Consent to Treatment Mental Health form. The system will add this form to your Admissions Group.

k. Next to the Search Forms: section, enter: Consent To Treatment.

l. Double click on the Consent to Treatment Substance Use SUD form. The system will add this form to your Admissions Group.

m. Click the <Submit> tab.
Both Consent to Treatment forms are now added to your Admissions Group. See screen below:

**NOTE:** The creation of a *Group* on the *My Chart View* is a one-time set-up. You can, over time, add new forms to the Admissions group you created as needed.
16) Click on the **Consent to Treatment Mental Health** link and the system will display the **Consent to Treatment Mental Health** form that was completed and signed by the client. See Below:

17) On the right side of this form, click on the `<Print>` option to print the Consent form for the client.

18) Provide the client with a signed copy of the **Consent to Treatment Mental Health** form.
Consent to Treatment Substance Use SUD

1) Choose the correct client under the Recent Clients section.

2) Enter Consent To Treatment Substance Use SUD in the Search Forms field of the Forms & Data widget.

3) Double-click Consent To Treatment Substance Use SUD from the search results.

4) The system will automatically open the Consent To Treatment Substance Use SUD form for the end user.

NOTES:

- Refer to the Consent to Treatment Mental Health Form section and follow all of the same steps to complete the Consent form.

- There are 17 boxes (sections) for the Consent to Treatment Substance Use SUD form that must be completed.

- If your client wishes to obtain a copy of the signed Consent to Treatment Substance Use SUD form, follow the same steps for printing the consent form as listed in the Consent to Treatment Mental Health Form section.
Bed Reservation Form

1) Enter **Bed Reservation** in the Search Forms field of the Forms & Data widget.
2) Double-click **Bed Reservation** from the search results.
3) Enter the client’s relevant information in the **Last Name** field of the Select Client window.
4) In the **Results** section, the system will provide the user with a list of clients who potentially match the search criteria.
5) Highlight the correct client. Click on the **<Select>** tab.
6) Highlight the correct pre-admit episode where a bed needs to be reserved and click **<OK>**.
7) Under the **Priority** field, click on the drop down menu and choose the appropriate selection.
8) Under the **Unit (tentative)** field, click on the drop down menu and choose the appropriate selection.
9) Under the **Room (tentative)** field, click on the drop down menu and choose the appropriate selection.
10) Under the **Bed (tentative)** field, click on the drop down menu and choose the appropriate selection.
11) Under the **Cancel Reservation** section, the system default is set at **<No>**. The user has the option to come back to edit the **Bed Reservation** form and change this field to **<Yes>** if the client cancels his/her appointment.
Main Line Health Behavioral Health
Admissions Form (Inpatient)

1) Enter Admissions in the Search Forms field of the Forms & Data widget.
2) Double-click Admissions from the search results.
3) Enter the client’s relevant information in the Last Name field of the Select Client window.
4) In the Results section, the system will provide the user with a list of clients who potentially match the search criteria.
   - Highlight the correct client.
   - Click on the Select tab.
5) Highlight the correct episode that will be admitted into the inpatient program and click <Edit>.
   NOTE: All clients should have a Pre-Admit Episode that should be upgraded to an <Admit> status.
6) After validating that the chosen client record is accurate, select the correct Program the client will be admitted to next to the Program field.
   NOTE: The user MUST update the Program field from MLH Pre Admit to the correct Inpatient Program before filing the Admissions form. Once submitted, this form is NOT editable!

NOTE: You MUST review the Pre-Admit/Admission Date field to ensure that the actual Date of Admission is correct! Upon the client’s arrival, you should use Today’s date as the Date of Admission.
7) The Treatment Setting field will automatically be populated with the correct information based on
the program that was selected for the client.

8) Next to the **Type of Admission** field: make the appropriate selection.

9) Next to the **Source of Admission** field, make the appropriate selection.

10) Under the **Admitting Practitioner** section, enter the **Last Name** of the Admitting Practitioner. The system will provide a list of practitioners who meet the search criteria. This is a **required** field.

   **Note:** The Admitting Practitioner can be the Admissions Counselor who performed the Intake Process.

11) Under the **Attending Practitioner** section, enter the **Last Name** of the Attending Practitioner. The system will provide a list of practitioners who meet the search criteria. This is a **required** field.

12) The **Team Assignment** field will automatically be completed by the Program that was selected for this client.

13) Next to the **Practitioner Type** field, click on the drop down menu to see a list of options. Make the appropriate selection as needed.

14) The RRG field will auto populate once the **Admission program** has been selected.

15) Leave Chart Facility Number field BLANK!

16) Under the **Perform Discharge Alert** section, choose either **<Yes>** or **<No>** as appropriate.

   **NOTE:** If **<Yes>** is selected, the **Type of Alert** field is required and a selection can be made by clicking on the drop down menu.

17) Next to the **Reason for Contact** field, click on the drop down menu to make the appropriate selection.

18) Next to the **Primary Reason for Seeking Treatment** field, click on the drop down menu to make the appropriate selection.

19) Next to the **Custody** field, click on the drop down menu to make the appropriate selection.

   **NOTE:** If a selection is made other than **<None/NA>** the system prompts the user to complete the **Custody Effective Date** field with a valid date.

20) Under the **Permission to Contact after Discharge** section, choose either **<Yes>** or **<No>**.

21) Next to the **Allow Visitations?** section, make the correct choice from the drop down menu.

22) Under the **Accompanying Person Relationship** section, make a selection from the drop down menu.

23) Next to the **Accompanying Person Name** field, enter the person’s name: Last Name, First Name.

24) Next to the **Accompanying Person Address** field, enter the person’s address.
25) Under the Received Copy of Client Rights section, choose either <Yes> or <No>.
26) Under the Advanced Directive section, choose either <Yes> or <No>. 
NOTE: If <Yes> is chosen, the Advanced Directive Note section must be completed. It is a free text section.

27) Under the Automatic Room and Board Advanced Days section: Leave Blank

28) Under the Is this a Transition in Care? Section, choose <Yes> or <No> as appropriate. 
NOTE: If <Yes> is selected, the following two fields will become available to complete:
- Previous Hospital Admission Date
- Previous Hospital Discharge Date
29) Under the **Reason for Referral** section, enter any appropriate free text information.

30) Under the **Policy Number for 270/271 Real Time Processing** and the **Coverage Level for 270/271 Real Time Processing** sections, please leave **BLANK**.

31) If any client demographic information must be verified and/or updated, click on the **Demographics** hyperlink to verify and/or update information.
32) Click on the **Other Client Data** hyperlink.

33) Next to the **Current Residence Code** field, click on the drop down menu and choose the appropriate option. If this field was completed in the Pre Admit form, it will automatically populate this field on this form.

34) Next to the **Homeless Indicator** field, click on the drop down menu and choose the appropriate option. If this field was completed in the Pre Admit form, it will automatically populate this field on this form.

35) Next to the **Client's Living Arrangements** field, click on the drop down menu and choose the appropriate option.

36) Next to the **Number Living in Household** field, enter the appropriate number for the client.

37) Under the **Prescreened** section, choose either **<Yes>** or **<No>**.

   **NOTE:** If **<Yes>** is chosen, the system requires an entry under the **Prescreened by Whom** section.

37) Under the **School Record Requested** section, choose either **<Yes>** or **<No>**.

38) The **Immunization Records Requested** section, choose either **<Yes>** or **<No>**.

39) Under the **Informed of Smoking Policy** section, choose either **<Yes>** or **<No>**.

40) Under the **Veteran** section, choose either **<Yes>** or **<No>**.

   **NOTE:** If **<Yes>** is chosen the system requires that the following fields be completed:

   - Military Service From (date)
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Military Service To (date)

41) In the Pre-Admit Form there is a field: Veteran where the user can select either <Yes> or <No>. If this field is completed in the Pre-Admit form, it will automatically populate the Veteran field in the Admissions and Admissions (Outpatient) forms.

42) Next to the Military Branch of Service section, click on the drop down menu and make the appropriate selection.

43) Under the Handicap section, complete the fields:
   - Handicap - 1
   - Handicap - 2
   - Handicap – 3

44) Click on the Inpatient/Partial/Day Treatment hyperlink.

45) Next to the Unit field, click on the drop down menu and choose the appropriate unit for this admission.

46) Next to the Room field, click on the drop down menu and choose the appropriate unit for this admission.

47) Click on the Select Bed tab to obtain a view of all available beds for the client.

48) Next to the Bed field, click on the drop down menu and choose the appropriate unit for this admission.

49) Under the Admissions Charge Code field, leave BLANK. The system will automatically assign the Room and Bed Charge at Midnight depending on the program the client has been assigned to during the Admissions process.
**Bed Assignment**

1) Enter **Bed Assignment** in the Search Forms field of the Forms & Data widget.
2) Double-click **Bed Assignment** from the search results.
3) Enter the client’s relevant information in the **Last Name** field of the Select Client window.
4) In the Results section, the system will provide the user with a list of clients who potentially match the search criteria.
   - Highlight the correct client.
   - Click on the **<Select>** tab.
5) Highlight the correct admission episode and click **<OK>**.
   - Since the Admissions process requires the user to assign a Bed while admitting the client, the Primary use of the Bed Assignment form is to review and edit any changes (re-assign the Unit, Bed, and/or Room for the client.
6) Under the **Date of Bed Assignment** and **Time of Bed Assignment**, the system has auto populated these fields with the current date and time.
7) The **Unit**, **Room**, and **Bed** are displayed with the information entered during the Admissions process.
8) This client’s admission’s information is displayed as follows:

   ![Bed Assignment Form](image)

Using the Bed Assignment form, the user can edit the unit, room, and/or Bed at this time
9) Under the **Room and Board Billing Code** section, the system will have automatically populated this field with valid information based on the program the client was admitted to during the Admissions process.
   **NOTE:** DO NOT CHANGE
10) Under the Admission Charge Code section, these fields will remain **BLANK**!
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Admission (Outpatient)

1) Enter Admissions in the Search Forms field of the Forms & Data widget.
2) Double-click Admissions (Outpatient) from the search results.
3) Enter the client’s relevant information in the Last Name field of the Select Client window.
4) In the Results section, the system will provide the user with a list of clients who potentially match the search criteria.
   - Highlight the correct client.
   - Click on the <Select> tab.
5) Highlight the correct episode that will be admitted into an outpatient program and click <Edit>.
   NOTE:
   - All clients should have a Pre-Admit Episode that should be upgraded to an <Admit> status.
   - The exception will be when a client will be directly admitted to a specific program and does not require a Pre-Admit. Example: Client treated at one site and referred internally to another site.
6) After validating that the chosen client record is accurate, select the correct Program the client will be admitted to next to the Program field.
   NOTE: It is imperative that you correctly assign the client to the appropriate Program. Once the Admissions (Outpatient) form is completed, you CANNOT change the Program through any edit functions.

NOTE: You MUST review the Pre-Admit/Admission Date field to ensure that the actual Date of
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Admission is correct! Upon the client’s arrival, you should use Today’s date as the Date of Admission.

7) The Treatment Setting and the Treatment Service fields will automatically be populated with the correct information based on the program that was selected for the client.

8) Next to the Type of Admission field: make the appropriate selection.

9) Next to the Source of Admission field, make the appropriate selection.

10) Under the Admitting Practitioner section, enter the Last Name of the Admitting Practitioner. The system will provide a list of practitioners who meet the search criteria.

11) Under the Attending Practitioner section, enter the Last Name of the Attending Practitioner. The system will provide a list of practitioners who meet the search criteria.

12) Next to the Team Assignment field, click on the drop down menu to see a list of options. Make the appropriate selection as needed.

13) Next to the Practitioner Type field, click on the drop down menu to see a list of options. Make the appropriate selection as needed.

14) The RRG field will auto populate once the Admission program has been selected.

15) Leave Chart Facility Number field BLANK.

16) Under the Perform Discharge Alert section, choose either <Yes> or <No> as appropriate.

- If <Yes> is selected, the Type of Alert field is required and a selection can be made by clicking on the drop down menu.

17) Next to the Reason for Contact field, click on the drop down menu to make the appropriate selection.

18) Next to the Primary Reason for Seeking Treatment field, click on the drop down menu to make the appropriate selection.

19) Next to the Custody field, click on the drop down menu to make the appropriate selection.

   NOTE: If a selection is made other than <None/NA> the system prompts the user to complete the Custody Effective Date field with a valid date.

20) Next to the Allow Visitations? section, make a selection from the drop down menu.

21) Under the Accompanying Person Relationship section, make a selection from the drop down menu.

22) Next to the Accompanying Person Name field, enter the person’s name: Last Name, First Name.

23) Next to the Accompanying Person Address field, enter the person’s address.

24) Under the Received Copy of Client Rights section, choose either <Yes> or <No>.
25) Under the **Advanced Directive** section, choose either <Yes> or <No>.

**NOTE:** If <Yes> is chosen, the **Advanced Directive Note** section must be completed. It is a free text section.

26) Under the **Is this a Transition in Care?** Section, choose <Yes> or <No> as appropriate.

**NOTE:** If <Yes> is selected, the following two fields will be available to complete:

- Previous Hospital Admission Date
- Previous Hospital Discharge Date

27) Under the **Policy Number for 270/271 Real Time Processing** and the **Coverage Level for 270/271 Real Time Processing** sections, please leave BLANK.

28) Under the **Reason for Referral** section, enter any appropriate free text information.

29) If any client demographic information must be verified and/or updated, click on the **Demographics** hyperlink to verify and/or update information.
30) Click on the **Other Client Data** hyperlink.

31) Next to the **Current Residence Code** field, click on the drop down menu and choose the appropriate option. If this field was completed in the Pre Admit form, it will automatically populate this field on this form.

32) Next to the **Homeless Indicator** field, click on the drop down menu and choose the appropriate option. If this field was completed in the Pre Admit form, it will automatically populate this field on this form.

33) Next to the **Client’s Living Arrangements** field, click on the drop down menu and choose the appropriate option.

34) Next to the **Number Living in Household** field, enter the appropriate number for the client.

35) Under the **Prescreened** section, choose either **<Yes>** or **<No>**.

   **NOTE:** if **<Yes>** is chosen, the system requires an entry under the **Prescreened by Whom** section.

36) Under the **School Record Requested** section, choose either **<Yes>** or **<No>**.

37) Under the **Immunization Records Requested** section, choose either **<Yes>** or **<No>**.

38) Under the **Informed of Smoking Policy** section, choose either **<Yes>** or **<No>**.
39) Under the Veteran section, choose either <Yes> or <No>.

   NOTE: If <Yes> is chosen the system requires that the following fields be completed:
   • Military Service From (date)
   • Military Service To (date)

40) In the Pre-Admit Form there is a field: Veteran where the user can select either <Yes> or <No>. If this field is completed in the Pre-Admit form, it will automatically populate the Veteran field in the Admissions and Admissions (Outpatient) forms.

41) Next to the Military Branch of Service section, click on the drop down menu and make the appropriate selection.

42) Under the Handicap section, complete the following Fields as needed by clicking on the drop down menu and choosing the appropriate selection from the list:
   • Handicap - 1
   • Handicap - 2
   • Handicap - 3

43) Click on the Comments hyperlink if any appropriate comments need to be made regarding this Admission.
Update Client Data Form

1) Enter **Update Client Data** in the Search Forms field of the Forms & Data widget.
2) Double-click **Update Client Data** from the search results.
3) Enter the client’s relevant information in the **Last Name** field of the Select Client window.
4) The system will automatically take you to the **Update Client Data** form.

5) Review the data on the client’s record and make any changes as needed. Remember that fields noted in **RED** are **required** fields.
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Front Desk Form
1) Choose the correct client under the Recent Clients section.
2) Enter Front Desk in the Search Forms field of the Forms & Data widget.
3) Double-click Front Desk from the search results.
4) The system will automatically open the Front Desk form for the end user.
5) Based on the operational workflow that is expected for the client in question, click on the appropriated hyperlink:
   - Check In – used to collect a Time of Service (TOS) payment during the check-in process
   - Checkout – used to collect a TOS payment during the checkout process
6) Using the check-in process, click on the Check In hyperlink.
7) Under the Site box, choose the correct site where the client has a scheduled appointment.
8) Then, click on the **Client Checking In** field and wait for the system to display your client’s name.

9) Click on the tab: **Select Scheduled Services**, and the system will display all scheduled services for the client.

10) Choose the correct service for today to check in the client.

11) Press <OK>.

12) View **Client Demographic Information** tab allows you to view the address information for the client.
13) Under the **Notify Practitioner of Arrival** section, choose **<Yes>** to allow for the system to send a notification to the practitioner who is scheduled to see the client.

14) Under the **Expected Self Pay Amount** field, the system should populate this field with any co-pay/co-insurance amount as well as any self-pay balances from previous episodes.

15) Under the **Self Pay Amount Received at Check In** field, enter the amount that the client is paying today.

16) Under the **Payment Code** field, choose the correct payment code based on method of payment:
   a. Cash Payment on Site
   b. Check Payment on Site
   c. Credit Card Payment on Site

17) At the bottom of this form, click on the **<Elavon>** tab. The system will automatically take you to Elavon to process the payment.

**NOTE:** The user MUST first go to **Elavon** to process any TOS payments BEFORE filing the payment into Avatar.
17) The system will display the Elavon Payment Navigator screen:

![Elavon Payment Navigator Screen]

18) The required fields are noted with an asterisk (*) and some of these fields are automatically populated by the data stored in Avatar (e.g. Payment Type, Patient Last Name, Patient Account Number and Patient Date of Birth).

**NOTE:** Click on the Payment Type Drop Down menu to choose the correct Payment Type.
19) The section below portrays the Payment section where you will choose the correct payment type prior to processing the payment.

![Payment Form](image)

20) Notice that the Amount field in the Elavon Payment section is automatically populated with the amount entered in Avatar.

21) You must choose the correct payment type: Card/Check/Cash. The system always defaults to <Card>.

22) If <Cash> is chosen as the payment type, you only need to click on the <Submit> button to process the payment.

23) Once you click on the <Submit> tab, Elavon will automatically provide a receipt for you to print and provide to the client.

24) After the receipt is printed and given to the client, click on the <Close> tab and the transaction in Elavon will be completed.

25) If <Check> is chosen, note that the system will invoke the section below that must be completed:
26) The **Routing Number** field is required along with the fields **Check Number**, and **Check State**. Once the required information is entered, click on the **<Submit>** tab.

27) Follow the same steps when posting cash to produce a receipt and close the Elavon transaction.
28) If **<Card>** is chosen, you will leave the default of **<Card>**, verify that the amount you entered for payment is correct, and then click on the **<Swipe or Tap or Insert>** button. The following screen will be displayed:

![Payment Screen](https://example.com/payment-screen.png)

**Note:** If a client wishes to pay with his/her FSA (Flexible Spending Account) card, you must always choose **<Credit>** on the credit card swipe machine.

29) The credit card swap will pull in the amount you entered in the system and ask if that amount is okay. Click on the **<Yes>** button on the credit card swipe and swipe the credit card for the transaction to take place.

30) The client will sign the credit card receipt using the credit card swipe machine.

31) Once you click on the **<Submit>** tab, Elavon will automatically provide a receipt for you to print, and to provide to the client.
32) Once you provide the client with the receipt, click on the <Close> tab to close out of the Elavon system and click on your Avatar icon to allow for the submission of the payment into Avatar.
33) Once you are back in Avatar, the last field that must be completed is the **Elavon Receipt Number** field. This is a **Required** field. You will **ALWAYS** enter the **date of the transaction** as the Receipt Number! (e.g. DDMMYY).

![Image of Avatar interface](image)

**NOTE:** The Receipt Number in this example is the date the transaction took place!

34) For the final step, click on the `<File Check In>` tab.

**NOTE:** If you wish to confirm that the payment was applied to Avatar, you can choose the **Client Ledger** form and confirm with this form that the payment posted to the client’s account.
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Self Pay Payment Arrangement Form

1) Choose the correct client under the Recent Clients section.
2) Enter Self Pay in the Search Forms field of the Forms & Data widget.
3) Double-click Self Pay Payment Arrangement from the search results.
4) The system will automatically open the Self Pay Payment Arrangement form for the end user.

5) Under the Guarantor field, select <Self Pay> as the Guarantor.
6) Under the Effective Date of Payment Arrangement Date field, chose the appropriate date agree upon between you and the client.
7) Under the Expiration Date of Payment Arrangement Date field, chose the agreed upon date made between you and the client.

NOTES:
- Follow the MLHS P&P regarding the length of time allowed to pay a self-pay balance.
- Based on MLHS guidelines, in the Expiration Date of Payment Arrangement Date field, you can enter <T + the number of days allocated for the self-pay arrangement>. This field accepts a date based on 30 day increments.
• For example, if you wish to allow the client 180 days to pay the self-pay balance, you would enter $T+179$ in the **Expiration Date of Payment Arrangement Date** field.

8) Under the **Episode Number** field, choose the correct episode for this self-pay arrangement.
9) Under the **Minimum Payment Amount** field, enter the amount that will cover the total balance based on the 30 day payment plan made.

**NOTE:** The above example is for a client with a self-pay balance = $600.00 where the client will pay $100.00 per month for 6 months (180 days) as noted above.

10) The `<Print>` tab can be used to print out a report of the self-pay arrangement made for the client.
Individual Cash Posting Form

1) Choose the correct client under the **Recent Clients** section.
2) Enter **Individual Cash Posting** in the Search Forms field of the Forms & Data widget.
3) Double-click **Individual Cash Posting** from the search results.
4) The system will automatically open the **Individual Cash Posting** form for the end user.

5) Enter the client’s Name under the **Client** box.
6) Under the **Post by Claim or Episode** box, select **Episode**.
7) Under the **Episode** field select the episode where the client wishes to make a payment.
8) The **Start Date** and **Stop Date** fields are automatically populated based on information from the episode selected.
9) Click on the **<Select Item(s) to Post Against>** box.
10) The following screen will be displayed:

![Image of screen with payment posting details]

11) Select the correct **Date of Service** where you wish to post the payment from the client by clicking on the correct row and clicking the `<OK>` button. See Highlighted Row Below:
12) The system may display the following message:

![Image of a computer screen showing a message]

13) Click <OK>. The system will bring you back to the main Individual Cash Posting screen.

14) Under the Posting Date and Date of Receipt sections, enter <T> for Today (the date you are posting the payment).

15) Under the Dollar Amount to be Posted section, enter the amount the client is willing to pay.

16) Under the Posting Code field, enter the first couple of letters for the type of payment you are posting to the client’s account. The selection you make will be highlighted. See Below:
17) The following screen will be completed with data you entered:

18) Under the **Action for Remaining Balance if Applicable** section, choose <None>.

19) Click on the **Elavon** button at the bottom of the screen.

**NOTE:**
You will follow the same steps in Elavon as listed under the **Front Desk** form section.
20) Prior to hitting the <Submit> button, you must click on the Update Temporary File button. The following message will be displayed:

21) Click <OK>. All other fields on this form should remain BLANK.

22) Click <Submit>. The following message will display:

23) Click <Yes> if you wish to file the client’s payment.
Quick Cash Posting Form

1) Choose the correct client under the Recent Clients section.
2) Enter Quick Cash Posting in the Search Forms field of the Forms & Data widget.
3) Double-click Quick Cash Posting from the search results.
4) The system will automatically open the Quick Cash Posting form for the end user.

5) Under the Client section, enter the client’s Name.
6) You can click on <View Ledger> to see a client’s ledger that will display any guarantor liability. See example below:
7) Under the **Episode** section, click on the drop down menu and select the correct episode where the payment will be posted.

8) Under the **Guarantor** section, click on the drop down menu and select `<Self Pay>`.

9) The **Guarantor Balance for Service** field will display any monies already posted to the Self Pay guarantor.

10) Under the **Dollar Amount to be Posted** field, enter the amount that the client wishes to pay.

11) Under the **Posting Date** and **Date of Receipt** fields, enter `<T>` for Today.

12) Under the **Posting Code** field, enter the first few letters of the type of payment that will be made by the client. Choose the appropriate payment code from the list that is displayed. See below:
13) Click on the <Elavon> button at the bottom of the screen.

NOTE:
You will follow the same steps in Elavon as listed under the Front Desk form section.

14) Once you have posted the payment in Elavon and printed the receipt for the client, you can click on the <Close> button and return to Avatar.

15) Enter Today’s date as shown: 032818 into the Elavon Receipt field and hit the <Submit> button. The following message will display:
16) Click <Yes> if you wish to file the client’s payment.

17) The following message will display asking you if you wish to return to the form: **Quick Cash Posting**.

18) Click <No> to continue on with your additional tasks at hand.
Coming In Today Widget Form

The **Coming In Today** Widget allows the front desk user to easily see the appointments that are scheduled for the day in question. There are two sort parameters that can be used to nicely display the appointments:

**Site**: Allows the user to select the site where he/she is working that day.

**Sort**: There are three options under this drop down menu:
- First Name
- Last Name
- Appointment Creation Date/Time

1) To check a client in using the **Coming In Today** widget, you will Right click on the client you wish to check-in. See Below:
2) In this example, the client is: Me, Help. The following screen will display:
3) Click on the **Select payment type** drop down menu. Make the appropriate selection.

4) Enter the correct amount the client wishes to pay.

5) Click on the `<Elavon>` button and follow the same steps as listed in the **Front Desk Form** section of the manual.

6) Once the payment has process in Elavon, you will click on the `<Close>` button in Elavon and come back to Avatar.
7) You will enter the Date of Service next to the <Elavon> button.

8) Click on the <Paid> button to ensure that your payment is posted in Elavon.

See Screen Below:

9) Proceed with the next steps to process your client.
Program Transfer

1) Choose the correct client under the Recent Clients section.
2) Enter Program Transfer in the Search Forms field of the Forms & Data widget.
3) Double-click Program Transfer from the search results.
4) The system will automatically open the Program Transfer form for the end user.
5) Highlight the correct episode that will be “program transferred” and click <OK>.
6) Under the Program Transfer section, note the following fields that are automatically completed with existing information for the admitted client:
   • Program Transferred From
   • Current Treatment Setting

7) Under the Program field, click on the drop down menu and select the appropriate program that the client will be transferred to.
8) Under the Treatment Setting field, the system auto populated the field with <Inpatient/Residential> and the Treatment Service field with <Dual Detox>.
9) Under the Date of Transfer field, enter <T> for Today.
10) Under the Time of Transfer field, click on the <Current> tab or manually enter the time of the program transfer.
11) Enter the **new unit, room and bed** for the client under the:
   - Unit
   - Room, and
   - Bed fields

   **NOTE:** The Time of Bed Assignment field will automatically be filled with the same time as entered for the time of transfer.

12) Under the **Room and Board Billing Code** field, the system will automatically assign the Billing Code based on the program used to transfer the client.

13) Under the Admission Charge Code, field: **Leave Blank**.

14) Under the Daily Charge Code, field: **Leave Blank**.

15) **Do not complete** the following fields:
   - Partial Hospitalization Days – selection box – **Leave Blank**.
   - Partial Hospitalization Hours – **Leave Blank**.
   - Partial Hospital Billing Code – **Leave Blank**.
   - Partial Hospital Billing Code 2 – **Leave Blank**.
Pre Admit Discharge

1) Enter Pre Admit Discharge in the Search Forms field of the Forms & Data widget.
2) Double-click Pre Admit Discharge from the search results.
3) Enter the client’s relevant information in the Last Name field of the Select Client window.
4) In the Results section, the system will provide the user with a list of clients who potentially match the search criteria.
   • Highlight the correct client.
   • Click on the <Select> tab.
5) Highlight the correct episode that will be discharged and click <OK>.
6) Under the Date of Discharge section, click on <T> for Today.
7) Under the Discharge Time section, click on the <Current> tab.

**NOTE:** The Length of Stay field is automatically entered by the system.

8) Under the Type of Discharge section, choose the appropriate option from the drop down menu.
9) Under the Discharge Practitioner section, enter the name of the discharge practitioner. Or, enter a partial name and the system will provide a list of clinicians to select the appropriate staff member.

**NOTE:** This is not a required field.
10) Under the **Accompanied By** section, enter free-text information.

11) Under the **Discharge Presenting Problems – Primary** section, click on the down arrow to choose the appropriate choice from the drop down menu.

12) Under the **Discharge Presenting Problems – Secondary** section, click on the down arrow to choose the appropriate choice from the drop down menu.

13) Under the **Discharge Presenting Problems – Tertiary** section, click on the down arrow to choose the appropriate choice from the drop down menu.

14) Next to the **Current Residence Code** field, click on the down arrow to make the appropriate selection.

15) Next to the **Homeless Indicator** field, click on the down arrow to make the appropriate selection.

16) The **Date of Death** field is available for data entry **ONLY** if the **Type of Discharge** selection = **Death**.

17) The **Reason for Death** field can only be completed if the **Type of Discharge** selection = **Death**. If the **Reason for Death** field is to be completed, click on the down arrow to make the appropriate selection.

18) Under the **Discharge Remarks/Comments** section, provide any relevant information needed for
the chart. This section is free text.

**NOTES:**

- The system allows the user to update any client demographics at this time before submitting the Pre-Admit Discharge form.

- Alias information can be edited during the Pre-Admit Discharge process.
Client Document Capture Form

1) Choose the correct client under the **Recent Clients** section.
2) Enter **Client Document Capture** in the Search Forms field of the Forms & Data widget.
3) Double-click **Client Document Capture** from the search results.
4) The system will automatically open the **Client Document Capture** form for the end user.

5) Under the **Client ID** field, enter the Last Name of the client you are checking in for an appointment.
6) Choose the correct client from the list of displayed clients.
7) Under the **Episode Number** field, leave this field **Blank**.
8) Click on the <Launch POS Capture> tab and the system will provide the following information:

10) Click on the <Scan> option.

11) Under the Document Type section, click on the drop down menu to make the correct selection (e.g. insurance card).
12) Under the **Document Description** section, enter the name of the insurance card (e.g. Aetna or Cigna etc.). This task will allow for an easier way to choose and view a scanned insurance card when needed.

13) Notice the selection of insurance card under the Document Type and the name of the insurance.

14) On the left side of the screen, click on the `<Capture>` tab.
15) Prior to scanning the document, you will see the following message:

![Select Scanner](image)

16) Notice that the `<Any Device with PixTWAIN>` message is highlighted. Click on `<Done>`.

17) Avatar software will scan the document (insurance card) and display it on the screen for you to view and accept.

18) If you do not like the way the card or document has been scanned, click on the `<Delete>` option to delete both sides of the scanned document or card.
19) Once you view the scanned document and it meets your approval, click on the `<Save>` tab (next to the `<Capture>` tab on the top left portion of the screen). See Below:

![Image of the interface with the save and capture buttons highlighted.]

19) The following screen will be displayed:

![Image of the interface with the capture button highlighted.]
20) The insurance card scanned has now been saved and added to Avatar under your client’s Name.

21) To scan a client’s ID photo, you will follow the same steps to scan the insurance card.

22) Under the Document Type you will enter: <Photo ID> and under the Document Description field, you will enter <driver’s license> or the name of the document you are scanning.

23) Prior to scanning the photo ID, you must click on the <Settings> icon located in the upper right hand corner of the screen.

24) Click on the drop down menu for Color format and choose <24 bit color >.

   **Note:** You must scan the photo ID in color for it to appear clearly within the chart. Only choose <24 bit color> for photo IDs since scanning in color takes longer for the system to process scanning in color. Insurance cards and clinical documents should always be scanned in Black and White which is the default option.

25) Click the <Close> button and you will be go back to your HOME page.

26) If you wish to look at the insurance card in Avatar, double click on your client’s name under the Recent Clients section. See below:
27) The **Chart View** screen will be displayed:

28) Notice on the left hand side and under **Documents**, you can see a list of documents for this client.

29) If you click on **<Insurance Card>**, the following screen will be displayed:
30) Click on the episode where your client’s insurance card was scanned. The following screen will be displayed:

31) Avatar will display the document description of what was scanned, the client’s name, etc.

32) You can click on <View> and the bottom <View> button will become available for you to view the scanned document.

33) This process will bring up the scanned document for you to view. See below:

34) There are options to use to Zoom in on the document, print the document, etc.
Delete Last Movement Form

1) Choose the correct client under the **Recent Clients** section.
2) Enter **Delete Last Movement** in the Search Forms field of the Forms & Data widget.
3) Double-click **Delete Last Movement** from the search results.
4) The system will first display the following:

5) Click **<OK>**.
6) The system will automatically open the **Delete Last Movement** form for the end user.
7) Under the **Episode Number** field, click on the correct episode number.
8) The system will display the last “movement” made by the user to review before submitting this form. Please review the last movement to ensure that you still wish to delete the movement!

9) If you still wish to delete the last movement, click the <Submit> tab.

10) The system displays the warning below:

11) If you are sure about deleting the last movement displayed in the window, click <Yes>. Otherwise, click <No>.

12) The system will delete your last movement. In the example above, the client had been admitted to the Broomall OP Counseling program. Looking at the Admissions (Outpatient) form, the client is no longer in any admitted program. See Below:
Comprehensive Biopsychosocial Assessment Form

Assessments are used to evaluate the status of a client’s mental health, their level of functioning, daily habits and behaviors. Assessments document a client’s condition, and is an understanding of how client events or behavior relate to precipitating factors, previous behavior, and other events in the client’s life. In the Comprehensive Biopsychosocial Assessment, some questions are required and others are optional, although you are strongly encouraged to answer as many questions as possible, including those that are optional. Questions in red are required to finalize and submit the form.

How to Open the Biopsychosocial Assessment
Open up a new Biopsychosocial Assessment form for your client. Open the chart and then click once on your client (in the My Clients Widget) to highlight in green, then double-click on the link to the form (found in My Forms).
If more than one program is listed, make sure you select the correct program and episode.

The **Comprehensive Biopsychosocial Assessment** form will open. This form is multidisciplinary and will be completed and submitted by Admissions, Nursing and Therapists.

**IMPORTANT:** This form is episodic, that is, it is attached to an episode. Make sure you select your episode carefully. If you write the assessment under the wrong episode, it cannot be moved and you will have to write it all over again.
Concepts of the Biopsychosocial Assessment Form

Sections: The Biopsychosocial Assessment form is organized into sections that address related types of information. For example, there are separate sections for Mental Health History, Legal History and Trauma. As you complete the form, you can click on the sections to complete the information needed. It is recommended that you move through the form, one section at a time, in order, because of certain question logic in the assessment. You may return to a section to add information at any time.

Icons: The Comprehensive Biopsychosocial Assessment has a Backup Form button that will save the form while it is open. The button is on the left, just underneath the Submit button. EVEN THOUGH THE BIOPSYCHOSOCIAL HAS THIS BACKUP BUTTON, YOU SHOULD STILL CLICK “SUBMIT” TO SAVE AND CLOSE WHEN YOU EXIT THE FORM. When closing your assessment, DO NOT click the red circle with a white X.

Hyperlinks: Based on your log-in, additional forms are located in the left hand corner of the Biopsychosocial form. These hyperlinks promote ease of documentation for vital signs, allergies, diagnosis and ACE.
**Required Questions:** In the Comprehensive Biopsychosocial Assessment form, some questions are required and others are optional, although you are strongly encouraged to answer as many questions as possible, including those, that are optional. Questions in red are required to finalize and submit the form.

The header of every Multi-iteration Table is red. The table is not required documentation until you select <Add New Item>.

**Text Editor:**

If the text box requires a lengthy answer you want to spell check, you can pop out the text editor to see more of the field by clicking the associated icon. Click <Save> to close the pop out and save your edits. If you do not click <Save>, your edits will not be saved.
Main Line Health Behavioral Health

Search Function:

Click the tiny magnifying glass to search for a word or phrase in your text

Lightbulbs:

Throughout this and other documents, you will see a small light bulb symbol. If you hover over the symbol, you will see instructions on how to answer the question.

Question Logic: Some questions are required depending on the answers to other questions. For example, in the Medical History tab, depending on the answer to the first question in the tab, subsequent questions are either required or disabled. In the example below, because the clinician clicked <No> to the first question about neurological problems, all the other questions are not required and in fact are “grayed out” or disabled. No further information can be entered into these questions. In contrast to Cardiovascular Conditions where the clinician clicked <Yes> enabling additional information to be entered.

Multi-iteration Table: Allows multiple entries to be documented in a list format for documentation of items like histories, behaviors and treatments. The header in every Multi-iteration Table is red. The table is not required documentation until you select <Add New Item>. Once you select the <Add New Item> tables needs to be satisfied to meet the requirement. To document an entry in an iteration table select <Add New Item> first, then document in the appropriate fields. To delete or edit an item in the table, select the line item and notice it will highlight the line green. Click <Delete Selected Item> or <Edit Selected Item> to modify your documentation.
Main Line Health Behavioral Health

### Family Medical History

<table>
<thead>
<tr>
<th>Family Member</th>
<th>Condition</th>
<th>Comments</th>
</tr>
</thead>
<tbody>
<tr>
<td>Mother</td>
<td>Heart Problems &amp; Other</td>
<td>Mother Comments</td>
</tr>
<tr>
<td>Father</td>
<td>Diabetes &amp; Other</td>
<td>Father Comments</td>
</tr>
<tr>
<td>Sibling</td>
<td>Hepatitis &amp; Other</td>
<td>Sibling Comments</td>
</tr>
</tbody>
</table>

### Condition

- Cancer
- Diabetes
- Heart Problems
- Hypertension
- Stroke
- Diabetes
- Hepatitis
- Epilepsy
- Tuberous
- Mental Health Disease
- Substance Use Disorder
- Other

```javascript
Comments
```
### Biopsychosocial Sections of Form

The **Biopsychosocial Assessment** form is a multi-contributor form. The table below displays the sections completed by each role. Note some sections may be shared between roles.

<table>
<thead>
<tr>
<th>Admissions</th>
<th>Nursing</th>
<th>Therapist</th>
</tr>
</thead>
<tbody>
<tr>
<td>Presenting Concerns</td>
<td>Medical History</td>
<td>Trauma</td>
</tr>
<tr>
<td>Mental Health Hx</td>
<td>Family History</td>
<td>Relational Trauma</td>
</tr>
<tr>
<td>Mental Health Tx</td>
<td>Eating Disorder</td>
<td>Grief Loss</td>
</tr>
<tr>
<td>Addictive Behavior</td>
<td>Nursing Assessment</td>
<td>Psychosocial</td>
</tr>
<tr>
<td>Substance Use Details</td>
<td>Employment/Military</td>
<td></td>
</tr>
<tr>
<td>Substance Use Tx</td>
<td>Legal</td>
<td></td>
</tr>
<tr>
<td>Substance Use Cont</td>
<td>Financials</td>
<td></td>
</tr>
<tr>
<td>Risk Hx</td>
<td>Living/Social</td>
<td></td>
</tr>
<tr>
<td>Living Social</td>
<td>Woman’s Health - Living</td>
<td></td>
</tr>
<tr>
<td></td>
<td>Woman’s Health - Loss</td>
<td></td>
</tr>
<tr>
<td></td>
<td>Goals/Strengths</td>
<td></td>
</tr>
<tr>
<td></td>
<td>Narrative/Summary</td>
<td></td>
</tr>
<tr>
<td></td>
<td>Gambling</td>
<td></td>
</tr>
<tr>
<td></td>
<td>Other Addictive Behaviors</td>
<td></td>
</tr>
<tr>
<td></td>
<td>Support Group</td>
<td></td>
</tr>
</tbody>
</table>

Admission will initiate the **Comprehensive Biopsychosocial Assessment** form. Admissions will document:

**Presenting Concerns Section**

Enter the Assessment Date. Click **<Today>** or **<Yesterday>**, or for a different date, type it in or use the calendar. Enter in the Assessing Practitioner. The red sections are required. Complete additional fields as deemed necessary and relevant.
Mental Health History Section
This section contains question logic. If you document <Yes> to the Mental Health History it enables you to document the patient’s mental health history. If you document <No> the Mental Health History is disabled. The Mental Health History section contains questions with radio buttons and checkboxes. Here are some helpful hints for working with these types of fields.

1. Use the arrow keys to move around in a checkbox field.
2. In list fields that contain multiple check boxes, you can use Ctrl + A to select all. To unselect all use Ctrl + D.
3. You can use the space bar to check or uncheck a box.
4. Use the <F5> button to clear a question entirely, so that none of the radio buttons are checked.
Main Line Health Behavioral Health

Mental Health Treatment Section
The Mental Health Treatment Section has a Multi-iteration Table which allows multiple entries to be documented in a list format. Remember: The header in every Multi-iteration Table is red. The table is not required documentation until you select <Add New Item>. It also contains questions logically based on prior treatment reported.
Addictive Behaviors Section
The Addictive Behaviors Section contains <Yes> and <No> questions related to the client's history of addiction.

Substance Use Details Section and Substance Use Treatment Section
The Substance List Tab contains a multi-iteration table. Information about each substance the client uses/abuses has its own line in the list. To add a substance to the list, you must first create a new line.

Click Add New Item: Begin by adding a new row to the multi-iteration table by clicking <Add New Item> to start a new row. (For each new substance, you will begin by adding a new row.)

Fill out the rest of the row, entering information into the blanks below the table. Note that you will need to answer the questions for each substance in order, for the list to work properly.
TO EDIT A ROW: In order to edit a row, you need to first, select it. Double-click on the row that you want, or click once on the row, and then click <Edit Selected Item>. If you do not select the row, you will not be able to edit the information in it.

TO DELETE A ROW: In order to delete a row, you need to first select it. Double-click on the row that you want to delete, or click once on the row, and then click <Edit Selected Item>. Then click <Delete Selected Item>.

Make sure that you don’t accidentally added an extra line in the table. It’s easy to do by clicking on the button labeled, <Add New Item> too many times. If you accidentally add an extra row, you might overlook it because it is blank. Unfortunately, Avatar sees any blank lines that you leave in this table as unanswered required questions. You will not be able to submit your Comprehensive Biopsychosocial Assessment, either in Draft or Final, if you leave blank lines in this table.

Gambling
This section contains question logic if you answer <Yes> to the Have you gambled in the last 12 months? Question.

Other Addictive Behaviors
Other Addictive Behaviors contain a Multi-iteration Table which allows multiple entries to be documented in a list format as well as question logic related to additional addictive behaviors the client possesses.

Support Group
This section contains question logic based on your documentation of types of support the client has.

Risk History
The Risk Assessment is completed when questions about current danger to self/suicidality, danger to others/homicidally, are answered <Yes>. The section contains question logic based on your documentation. Make sure you ask clients about access to weapons such as firearms when discussing a plan to harm themselves or others.

Living Social
Assessment information is used in treatment plans to meet a client’s needs.

Finalizing and Submitting the Comprehensive Biopsychosocial Assessment
Admissions, Nursing and Therapist will finalize the Comprehensive Biopsychosocial Assessment form upon completion.
Finalizing and Submitting the Comprehensive Biopsychosocial Assessment

At the end of the Narrative Clinical Summary Section, Select <Final>. If you have missed one or more required fields, a window will pop up telling you which questions you still need to answer. There will also be red flags on the sections with missing details. An error dialogue box will display indicating the document cannot be finalized until the missing questions have been satisfied.

If all required fields are answered, the Confirm dialog box will be presented. Select <OK>. If you saved as Draft the Draft watermark will be removed. Select <Submit>. The Confirm Document dialog box and TIFF (picture of the completed assessment) is displayed.

As with the Progress Note form, you will have the opportunity to proofread. You may:

- Accept the psychosocial as Final and file it
- Reject the comprehensive biopsychosocial assessment form so that you can return it to draft status and edit some more
- <Accept> and <Route> the comprehensive biopsychosocial assessment form to a supervisor and/or approver(s). If you require a co-signature for your assessment, this notifies your supervisor who can then sign.