



Edwin M. Lee
Mayor

City and County of San Francisco
Department of Public Health
Community Behavioral Health Services

Edwin Batongbacal, LCSW
Director, Adult & Older Adult
Systems of Care
1380 Howard Street, 5th Floor
San Francisco, CA 94103
(415) 255-3446 - FAX (415) 255-3567
Email: Edwin.batongbacal@sfgov.org

Avatar Bulletin

Adult/Older Adult Assessment, ANSA and Treatment Plan Forms Anniversary Date Timeline Change Effective July 6, 2015

July 6, 2015

The April 24 and June 18, 2015 Memoranda to all SFBHS Adult/Older Adult Mental Health Providers informed you of impending changes to the Adult/Older Adult Assessment, ANSA and Treatment Plan. This Bulletin provides information on how these policy changes are realized in Avatar.

- I. Major differences in forms, widget, bundles, reports
- II. Views of updated assessment
- III. Option to pull data forward from prior assessments

These changes are effective on July 6, 2015.

I. Major differences in forms, widget, bundles, reports

1. Adult/Older Adult Assessment (Long and Short)

- a. The current form has been slightly modified to serve as both the Initial Assessment and the Annual Assessment.
- b. If previous Assessment exists, there is an option to automatically populate selected data from prior assessments. **Note:** If you do not want to pull data from a prior assessment, click on Yes box next to "I would like to start a blank assessment." See example below.

2. ANSA Outcomes Rating

- a. This is now a separate form, no longer embedded in the Treatment Plan of Care.
- b. Two new fields were added:
 - Assessment Type: ANSA Non-MD or ANSA MD
 - Assessment Category: Initial or Annual Assessment Update

3. Adult/Older Adult Treatment Plan of Care

- a. Former name was "Adult/Older Adult Treatment Plan of Care/Reassessment".
- b. Re-assessment/Justification for Continued Treatment has been disabled for Mental Health Providers.
- c. ANSA removed.

4. New Bundles (for licensed clinicians only)

- a. New bundles were created to assist with the completion of the assessment and associated information.
 - Adult/OA Assess (Long)/DX/ANSA Bundle
 - Adult/OA Assess (Short)/DX/ANSA Bundle
- b. The forms in the bundle appear as tabs across the top, adjacent to "Chart". This facilitates movement amongst the three distinct forms. But remember – you need to 'Submit' each form separately in order to complete entry to Avatar.

5. Updated Reports and Widget

- a. TPOC Due reports were updated to support TPOC due date based on the “Anniversary of Episode Opening Date” (known as “Admission Date” in Avatar).
 - Adult TPOC Due by Clinician Report
 - Adult TPOC Due by Clinician, Supvr Report
 - Adult TPOC Due by Program/Staff Report
- b. New widget created to support the revised TPOC due date policy.
- c. All A/OA Assessment and Treatment Plan reports have been updated.

II. Views of updated assessment

1. Select a prior Adult/Older Adult Assessment (to pull items forward from) by clicking on the row. Then, click OK.

| Episode | Date of assessment | Data Entry By (Lo | Assessment Catego | Program of Servic | Status - Draft / |
|---------|--------------------|-------------------|-------------------|-------------------|------------------|
| 5 | 07/04/2015 | Kimberly Voelker | Initial | | Draft |
| 1 | 03/04/2015 | Ruben Gorrea | Annual Assessment | A Better Way (38 | Draft |
| 1 | 02/24/2015 | Kimberly Voelker | Annual Assessment | A Better Way (38 | Draft |

2. See new field to select Initial or Annual Assessment Update. Click “Yes” checkbox to start with a blank Assessment, i. e. **no** items carry forward from prior Assessment.

1. PRESENTING PROBLEM

- 2. RISK ASSESSMENT
- 3. PSYCHOSOCIAL AND F...
- 4. MENTAL HEALTH HIS...
- 5. SUBSTANCE USE
- 6. MEDICAL HISTORY AN...
- 7. MEDICATIONS
- 8. CRIMINAL JUSTICE HI...
- 9. MENTAL STATUS EXAM
- 10. CLIENT STRENGTHS
- 11. CLINICAL FORMULAT...

Date of assessment/rating: [Date Picker]

Assessment Type: Adult/Older Adult Assessment

Assessment Category: Initial Annual Assessment Update

-I would like to start a blank assessment: Yes No

Status - Draft / Pending Approval / Final: Draft Pending Approval

Supervisor to Notify: [Dropdown]

Comments for Supervisor: [Text Area]

Attestation:
The provider submitting this assessment certifies that the information therein is current and in compliance with all Federal, State and City and County of San Francisco regulations.

III. Option to pull data forward from prior assessments

These items will pull forward from the selected prior assessment into the new form. Items that do NOT pull forward are also shown.

| Form | Section | Items Pull Forward | Section | Items Do NOT Pull Forward |
|---|---------|--|---------|---|
| Adult/Older Adult Assessment (Short) | 1 | Presenting Problem and Justification for Continued Treatment (if Annual Update) Narratives | 2 | Risk Assessment (Radio Buttons) |
| | 2 | Risk Assessment Narrative | 5 | Substance Use/ CAGE (Radio Buttons, Check Boxes) |
| | 3 | Psychosocial & Family History & Relevant Conditions Affecting Physical and Mental Status (all items) | 8 | Criminal Justice History (Radio Buttons) |
| | 4 | Mental Health History – Client and Family (all items) | 9 | Mental Status Exam |
| | 5 | Substance Use (Narrative only) | | |
| | 6 | Medical History and Physical Health Conditions | | |
| | 7 | Medications (all items) | | |
| | 8 | Criminal Justice History (Narrative only) | | |
| | 10 | Client Strengths | | |
| | 11 | Clinical Formulation, Recommendation, Disposition | | |
| | | | | |
| Form | Section | Items Pull Forward | Section | Items Do NOT Pull Forward |
| Adult/Older Adult Assessment (Long) | 1 | Presenting Problem and Justification for Continued Treatment (if Annual Update) Narratives | 2 | Risk Assessment (Radio Buttons) |
| | 2 | Risk Assessment Narrative | 5 | Substance Use/ CAGE (Radio Buttons, Check Boxes) |
| | 3 | Psychosocial & Family History & Relevant Conditions Affecting Physical and Mental Status (all items) | 6 | Medical History and Physical Health Conditions (Checkboxes, Radio Buttons, Treatment Narrative) |
| | 4 | Mental Health History – Client and Family (all items) | 8 | Criminal Justice History (Radio Buttons) |
| | 5 | Substance Use (Narrative only) | 9 | Mental Status Exam |
| | 6 | Medical History and Physical Health Conditions (Narrative items) | | |
| | 7 | Medications (all items) | | |
| | 8 | Criminal Justice History (Narrative only) | | |
| | 10 | Client Strengths | | |
| | 11 | Clinical Formulation, Recommendation, Disposition | | |

Need Help?

- If you need assistance with forms or reports, please contact the Avatar Help Desk at 415-255-3788 or via e-mail at avatarhelp@sfdph.org
- If you have questions about the CBHS policy, please contact Edwin Batongbacal.