

Avatar Account Request Form Instructions

The Avatar Account Request Form (AARF) has been updated to coincide with the implementation of the new Compliance Department procedure for obtaining a Staff ID (through MD-App) on January 1, 2020.

Workflows for requesting a new account and for updating/reactivating an existing account are located at the end of this document.

Only the updated Avatar Account Request Form Needs to Be Submitted

To request a new Avatar account, or to update/reactivate an existing one, only the AARF needs to be submitted.

Once the AARF has been submitted, the Compliance Department will email the user a link to complete the remaining forms online—replacing the paper versions of the Certification and Verification for Staff ID form and the user agreement.

The Avatar Account Request Form Must Be Typed

The AARF is a fillable PDF form that, except for signatures, *must be typed*. Red fields are required. Handwritten or incomplete forms will not be accepted.

We strongly recommend that you complete the form using official Adobe PDF software to ensure compatibility.

If you have questions about completing the form, contact the Avatar Help Desk at 415-255-3788.

Completed forms should be emailed to avataraccounts@sfdph.org or faxed to Avatar Accounts at 415-252-3008. Save a copy of the completed form, with signatures, for your records.

As before, allow for 10 business days between the time you submit an AARF and an Avatar account potentially becomes available for use.

In order for a new Avatar account to be activated, both a Staff ID for the user must be generated by the Compliance Department and training must be verified.

All Avatar users are required to have a Staff ID *and* attend training, without exception.

When Is Training Required?

Training is required for all new accounts and when reactivating accounts that have been inactive for more than 365 days.

Training is not required when updating a currently active account or reactivating an account that has been inactive for less than 365 days.

There are no exceptions for individuals who have used Avatar in another county system. All staff members are expected to participate in training since the SFDPH environment is unique.

Training

Enroll your staff in training at your earliest opportunity. Training can be requested using the Avatar Account Request Form or by calling the Avatar Help Desk at 415-255-3788.

Account forms and links to the training schedules are available at:

<https://www.sfdph.org/dph/comupg/oservices/mentalHlth/BHIS/avatarUserDocs.asp>

On-Site Training by Certified Avatar Trainer

If you have a Certified Avatar Trainer at your site, submit the Attestation of On-Site Avatar Training at your earliest opportunity by emailing avataraccounts@sfdph.org or faxing 415-252-3008.

NOTE: Only authorized personnel at 1380 Howard Street can certify Avatar trainers. If you have a staff member that you would like to have certified as an Avatar trainer, have that person call the Avatar Help Desk at 415-255-3788 to open a ticket and begin the process.

When an Avatar Account Request Form Is Not Needed

To have permissions added to an existing account, have a supervisor email a request to the Avatar Help Desk at avatarhelp@sfdph.org.

To add or remove co-signers on an account, have the user or a supervisor call the Avatar Help Desk at 415-255-3788.

To reactivate an account that has been inactive for less than 365 days at the same agency, with the same credentials, have the user call the Avatar Help Desk at 415-255-3788.

How to Complete the Avatar Account Request Form

- The form, except for the signatures, must be typed.
- Handwritten or incomplete forms will not be accepted.
- If you need to provide information that does not fit on the form, include that information on a separate page.
- If you have questions about completing the form, contact the Avatar Help Desk at 415-255-3788.
- If you have questions about MD-App, please contact the Credentialing Unit at 415-255-3786 or 415-255-3406.

Below are instructions and information about completing the different sections of the form:

Staff Information

Include your full name, not a nickname. The Staff ID generated by the Compliance Department and linked to your Avatar account is based on your legal name. Discrepancies between an Avatar account name and the name on a Staff ID have caused problems in the past. If you want to list a nickname with your full name, include it in parentheses in the First Name field (e.g., Samantha (Sammie)).

New Account

Check the New Account box if you are requesting an Avatar account in the city and county of San Francisco for the first time.

Reactivation/Update

If you are reactivating or updating an existing Avatar account, include your current username. **Do not check this box if you are adding a program.** If you check this box, we will replace your current agency information in Avatar—if it is different—with the information that you provide on the form.

Adding Program

Check this box if you are adding an additional program to your existing Avatar account. Include a separate page naming your current program/s.

Name Change

Check this box to change your name. Be sure that you have updated your NPI information and any licenses or credentials you have before submitting the form.

Avatar Staff ID Only (No Account)

Check this box if only an Avatar Staff ID is needed and an actual Avatar account is not.

Agency Information

Include the requested information about the agency where you will be using Avatar.

Role Information

Check only the boxes that pertain to the work you will be doing at your agency. Ask your supervisor to assist you if you have any questions and to obtain the name of a Like Account (i.e., someone who does the same work you will be doing at your agency). A Like Account is especially helpful if your position at an agency is not a standard clinical or clerical one.

Substance Use Program

If you work for an SUD program, list the System Code/s you need to access. Have your supervisor assist you if you are unsure of your System Code/s.

Special Programs

If you check one of the boxes in the Special Programs section, be sure to list a Like Account in the field above.

Co-Signers

If you require a co-signer, list the names of up to two eligible, currently active Avatar users at your agency. If you need add more than two co-signers, include the information on a separate page.

If you do not require a co-signer because you are a LPHA (Licensed Practitioner of the Healing Arts) or will not be doing clinical work in Avatar, check the appropriate box.

Training

Use the fields in this section to request a specific training and date.

Current Training schedules are available at the following link:

<https://www.sfdph.org/dph/comupg/oservices/mentalHlth/BHIS/avatarUserDocs.asp>

If training will be conducted on-site (by a Certified Avatar Trainer at your agency), include the Attestation of On-Site Avatar Training when you submit your Avatar paperwork.

Required Signatures

Complete all of the fields in this section. An account must be authorized by a supervisor, and the employee and the supervisor must be different people.

Workflow: Requesting a New Avatar Account

1	Submit a typewritten Avatar Account Request Form (AARF) to Avatar Accounts, signed by both the user and the supervisor.
2	Avatar Accounts forwards a copy of the AARF to Compliance, creates (but does not activate) the Avatar account for the user, and initiates the WebConnect account creation process, if applicable.
3	Based on the AARF, Compliance emails the user a link to the forms that need to be completed.
4	User accesses the link, sets up a password, and completes the required set of forms, uploading any needed documentation.
5	Compliance generates the Staff ID.
6	Avatar Accounts links the Staff ID to the Avatar account.
7	Avatar Accounts activates the account once training has been completed.

Workflow: Updating an Existing Avatar Account

1	Submit a typewritten Avatar Account Request Form (AARF) to Avatar Accounts, signed by both the user and the supervisor.
2	Avatar Accounts forwards a copy of the AARF to Compliance and initiates the WebConnect account creation process, if applicable.
3	Based on the AARF, Compliance emails the user a link to the forms that need to be completed.
4	User accesses the link and completes the required set of forms, uploading any needed documentation.
5	Compliance generates the Staff ID.
6	Avatar Accounts updates the account based on the AARF and the Staff ID information.
7	If applicable, Avatar Accounts activates the account once training has been completed.