My Avatar
Edit Service Information

What is the purpose of **Edit Service Information**?
The purpose of this form is to edit or change certain fields for a service where the original information would have been typically entered in *Progress Notes (Group and Individual)*. For example, changing the service code, location, documentation time, etc will immediately reflect in the client treatment service history. But the services must be in “OPEN” status. *(See below for fields that can be changed.)*

**IMPORTANT:** You may not change the following:

1. The **SERVICE DATE**
   In order to change a service date, you must delete the entire entry/service and re-enter a new progress note.
2. Any service that has been **CLAIMED**
   *If the service status shows up as CLAIMED (on the "Select Service(s) to Edit screen), then you must complete the BH7019 Claim Adjustment Form and submit it to Robert.Geller@sfdph.org for mental health services or Jeaneen.Bullard@sfdph.org for substance abuse services.*

How do you get to the Edit Service Information form?
**Menu path:** → Avatar PM / Services / … Ambulatory Services / Edit Service Information

Or, go to the **“Search Forms”**, type **"edit"** and press Enter. Select and double-click **“Edit Service Information”** from the dropdown list.

1. In the "**Client ID**" field, enter client ID (BIS#) or type in LastName,FirstName. Click on the button to activate search. The dropdown list will display the client meeting the search criteria.
2. Select the client by double clicking on the name or by using the arrow keys to move to the desired client and press Enter.
3. In the "**Episode Number**" field, select the episode under which the service was entered.
4. In the "**Service Start Date**" and "**Service End Date**" fields, enter the start and end dates (MM/DD/YYYY) of the service(s) for which you want to make a correction. If you are changing only one service, enter the same date of service in both the Start and End Date fields.
5. In "**Service Selection Default**" radio buttons, choose “None”. **DO NOT** choose “All” which selects every service within the date range entered. “All” could cause inadvertent changes to services you did not intend to change.
6. Click on the "Select Service(s) to Edit" button to view all service(s) within the date range entered. To select service(s) for editing, click in the box next to the service(s) to be edited. A checkmark will appear in the box. **Note:** You may ONLY make changes to services that are in **OPEN** status. Click the “OK” button to select service(s).

7. Then the service information appears on screen. **Except** for **Service Date**, other fields are editable:
   a) **Service Code** – to correct service code if incorrect service code is displayed
   b) **Program** – to correct program of service if incorrect program is displayed
   c) **Location** – to correct location to reflect correct place of service
   d) **Duration** **CAUTION** –  
      In order to change Time Duration, go the Practitioner (or Co-Practitioner) Face-to-Face Time and/or the Practitioner (or Co-Practitioner) Doc and Travel Time located on the BOTTOM RIGHT HAND CORNER. The system will automatically calculate the Total Duration time.  
      Only when there is NO Face-to-Face Time and NO Doc and Travel Time should you change Duration (minutes) which represents the Total Duration Time located on the MIDDLE of the LEFT HAND SIDE of the screen. (An example would be a non-billable service ADM99 that lasted 47 minutes.)
   e) **Note Reference Code (837 Billing)/Text** – do not use, click or TAB to next field
   f) **Practitioner** – to correct practitioner of service only
   g) **Modifiers** – to add modifier for duplicate service (click Help Lightbulb icon to see DMH/ADP guidelines)  
      **Mental Health Modifier format is a 5-character alpha-numeric string (e.g. HE,76)**  
      i.e. 2 capital letters + 1 punctuation mark + 2-digit number. "H","E", comma, no space, and 59, 76, or 77;  
      59 – Distinct Procedural Service  
      76 – Repeat Procedure by Same person (rendering provider)  
      77 – Repeat Procedure by Different person (rendering provider)
   h) **Co-practitioner** – to edit if missing or incorrectly entered
i) Co-Practitioner Duration (Minutes) – **DO NOT edit TOTAL duration.** Edit Co-Practitioner Face-To-Face Time and Doc / Travel Time on the right side of the screen.

j) Second Co-Staff Member – to edit or add if needed.

k) Second Co-Staff Duration (Minutes) – **DO NOT edit TOTAL duration**

l) Medical Diagnosis 1 and Medical Diagnosis 2 – **DO NOT edit**

m) Emergency Indicator – to select if the client has an DHCS Medi-Cal Aid Code that is restricted to Emergency Services, and the service qualifies per DMH/ADP guidelines.

n) Evidence-Based Practices/Service Strategies (CSI) – to change EVP/SS from default.

o) **Face-to-Face Time** – to edit the number of minutes, when applicable **see 7d on page 2**

p) **Doc and Travel Time** – to edit the number of minutes, when applicable **see 7d on page 2**

q) Once the appropriate fields are edited, save by clicking the **Submit** button.

If you are uncertain about your edits, **do not save or click “Submit”** button. If you do, your name will be the last one to possibly have made erroneous changes to this service record. Think smart; be safe! Exit by clicking the **X** button located on the upper left hand corner. Otherwise, start over again or if you need help, contact Avatar HelpDesk at 415.255.3788 or email: avatarhelp@sfdph.org.