

## 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.)

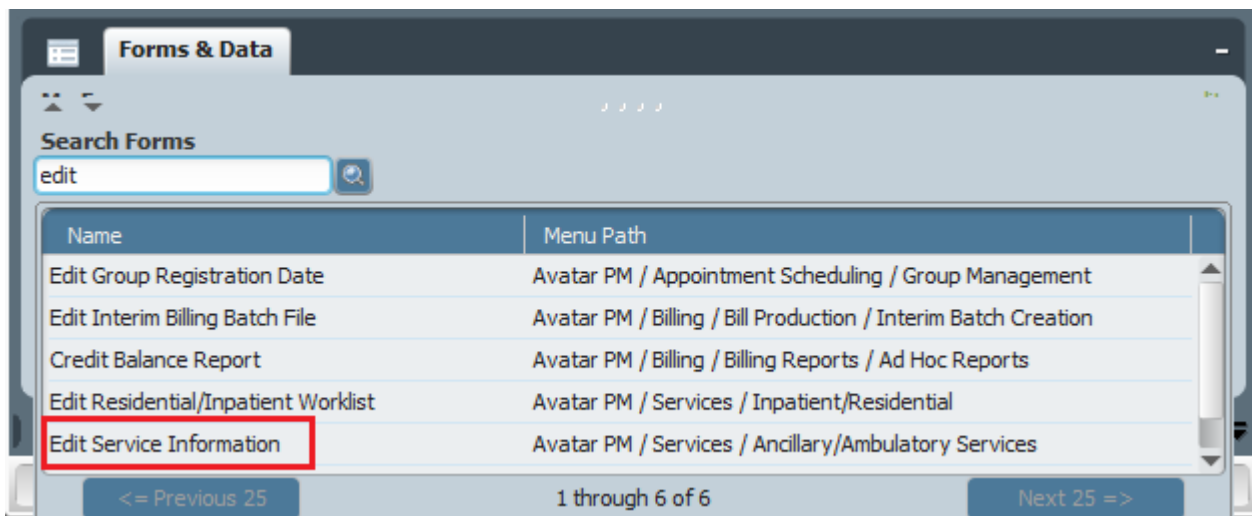
### **IMPORTANT: You may not change the following:**


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](mailto:Robert.Geller@sfdph.org) for mental health services or [Jeaneen.Bullard@sfdph.org](mailto: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).

Client: [REDACTED]  
 Episode Number: 1

Service Date	Service Code	Program	Practitioner	Status
<input type="checkbox"/>	03/26/2012	Individual Psychothe	RAMS Outpatient Ser	Claimed
<input type="checkbox"/>	04/02/2012	MEDICATION SUPPORT/M	RAMS Outpatient Ser	Open
<input type="checkbox"/>	04/02/2012	INDIVIDUAL PSYCHOTHE	RAMS Outpatient Ser	Claimed
<input type="checkbox"/>	04/09/2012	INDIVIDUAL PSYCHOTHE	RAMS Outpatient Ser	Claimed
<input type="checkbox"/>	04/13/2012	INDIVIDUAL THERAPY -	RAMS Outpatient Ser	Open
<input type="checkbox"/>	04/16/2012	EVAL AND MGMT INDIVI	RAMS Outpatient Ser	Claimed
<input type="checkbox"/>	04/16/2012	INDIVIDUAL PSYCHOTHE	RAMS Outpatient Ser	Claimed
<input type="checkbox"/>	04/23/2012	INDIVIDUAL PSYCHOTHE	RAMS Outpatient Ser	Claimed
<input type="checkbox"/>	04/30/2012	EVAL AND MGMT INDIVI	RAMS Outpatient Ser	Claimed
<input type="checkbox"/>	04/30/2012	INDIVIDUAL PSYCHOTHE	RAMS Outpatient Ser	Claimed
<input type="checkbox"/>	05/14/2012	EVAL AND MGMT INDIVI	RAMS Outpatient Ser	Open
<input type="checkbox"/>	05/14/2012	INDIVIDUAL PSYCHOTHE	RAMS Outpatient Ser	Open
<input checked="" type="checkbox"/>	06/04/2012	CASE MANAGEMENT BROK	RAMS Outpatient Ser	Open
<input type="checkbox"/>	06/04/2012	CASE MANAGEMENT BROK	RAMS Outpatient Ser	Open
<input type="checkbox"/>	06/11/2012	EVAL AND MGMT INDIVI	RAMS Outpatient Ser	Open
<input type="checkbox"/>	06/11/2012	CASE MANAGEMENT BROK	RAMS Outpatient Ser	Open
<input type="checkbox"/>	06/13/2012	MEDICATION SUPPORT/M	RAMS Outpatient Ser	Open

7. Then the service information appears on screen. **Except** for **Service Date**, other fields are editable:
- Service Code** – to correct service code if incorrect service code is displayed
  - Program** – to correct program of service if incorrect program is displayed
  - Location** – to correct location to reflect correct place of service
  - 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.)
  - Note Reference Code (837 Billing)/Text – **do not use**, click or TAB to next field
  - Practitioner** – to correct practitioner of service only
  - 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)**
  - 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  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  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](mailto:avatarhelp@sfdph.org)

The screenshot shows the 'Edit Service Information' form with the following fields and values:

- Client ID: [Redacted]
- Service Start Date: 05/14/2012
- Service End Date: 05/14/2012
- Service Selection Default:  All  None
- Service Code: EVAL AND MGMT INDIVIDUAL PSYCH 20-44 MINS (90805)
- Program: RAMS Outpatient Services (38943)
- Location: Community Mental Health Center
- Duration (Minutes): **35**
- Cost Of Service: 208.25
- Note Reference Code (837 Billing): [Empty]
- Note Reference Text (837 Billing): [Empty]
- Practitioner: [Redacted]
- Modifiers: [Empty]
- Co-Practitioner: [Empty]
- Co-Practitioner Duration (Minutes): [Empty]
- Second Co Staff Member: [Empty]
- Second Co Staff Duration (Minutes): [Empty]
- Medical Diagnosis 1: [Empty]
- Medical Diagnosis 2: [Empty]
- Emergency Indicator:  Yes  No
- Evidence-Based Practices / Service Strategies (CSI):
  - Age-Specific Service Strategy
  - Assertive Community Treatment
  - Delivered in Partnership with Health Care
  - Delivered in Partnership with Law Enforcement
  - Delivered in Partnership with Social Services
- Practitioner Face to Face Time (minutes): **25**
- Practitioner Doc and Travel Time (minutes): **10**
- Co-Practitioner Face to Face Time (minutes): [Empty]
- Co-Practitioner Doc and Travel Time (minutes): [Empty]