Avatar Corrections: What To Do If You Make a Mistake

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IMPORTANT: If you send confidential information, you need to encrypt or send via Avatar Staff Messaging. If you need an encrypted message so that you can send secure information back, send a message to askqi@santacruzcounty.us with subject line, “Send encrypted message,” and someone will send you an encrypted message. You can then reply to this message and communicate confidential client information within the county encrypted e-mail system.

Definitions to Help with Corrections

Episode (Admission Program) Number

For episodic forms, we need the episode (admission program) number, not just the name of the program. To find it, look at the program tab in the client chart where your document is, or look at the Client Episode Widget. There will be a number before the program name. This is the number we need.

Example of the Episode Number in a Program Tab a Chart

SC General Purpose Progress Note

2LE - 00044 MH COUNTY OUTPATIENT (0)
10/17/2016 - Active

1: CLIENT REGISTRATION AND FINANCIAL (0)
10/17/2016 - Active
**Client Number**

This is the client’s Medical Record Number. **FRANK TTESTONE (000960000)**

**Service Date**

This is the date on which you provided the service we are deleting or correcting. If you make a mistake with the date, we need the date you actually entered, the date that was a mistake. We do not need the date that you wanted it to be. This does not help us. We need this information to find the note so we can delete it.

**Data Entry Date**

This is the date you finalized the form. This is not the Service Date. Find this in the chart inquiry view, in the separator bar at the top of each document.

**Data Entry Time**

This is the time when you finalized the note or the document. We don't need this all the time, but sometimes this might be the only thing we can use to figure out which note you want us to correct or delete. If you make a mistake, and then redo the note right afterward, we usually need this information. Another example: You do multiple groups in one day with the same clients.

- Sometimes, we might need the submit date and time to delete your note.
- If there are multiple notes on the same day with the same service information (i.e. service code, duration, etc.) then the submit date and time might be the only way we can figure out which note to delete. We don't want to delete the wrong note.
- You can find the submit date and time in the client's chart in the inquiry view for the note.
- ADVANCED SKILLS: you can copy and paste the submit information directly from the chart.
Santa Cruz Avatar

Total Duration Time

This is the total amount of time spent. We do not need the separate Face-To-Face or Other Time. We only need the Total Duration.

Is the episode still open (Y/N)

If we are reverting a progress note or another document to draft, we need to know if the episode is closed. If the episode is closed, then we must reopen it for you. You cannot complete a draft note, or most other documents, in a closed episode. Once you make your changes, you will have to use the Discharge form again to close the episode.

Reason (for deleting note or making changes)

Medi-Cal requires that we enter a reason when documents are deleted or reverted to draft. Don't forget to provide this information.

Is this a group note? (Y/N)

We need to know if you are asking for changes or deletion of a group progress note.
Revert to Draft Vs. Data Correction for Avatar Progress Notes

(What we can and cannot change for you)

For progress note corrections, you can choose to have your note reverted back to draft to make the change yourself, or you can request that we make the correction for you, behind the scenes. We can change some fields for you, others we cannot. If we can’t change the data for you, request that the note be reverted to draft so you can change the data yourself.

**Group Notes:** It is preferable to have us make changes to group notes for you. Some things, such as the date, cannot be changed, even if the note is reverted to draft. Instead, the note has to be deleted and redone. Group notes can be complicated. If you are not sure how to solve a problem with a group, contact the County Behavioral Health QA department and let us help you problem-solve. askqi@santacruzcounty.us

**What We Can Change for You:** Service Code, Total Duration, Service Program, Location, Episode (Admission Program)

**What We Can’t Change for You:** The date of the note, client name, “Face-To-Face Time”, “Other Time” (we CAN change the Total Duration), Language questions, Treatment plan elements, Progress note text (what you put in the data, intervention, response, referrals and follow-up care questions).

If we revert a note to draft, you can change most of the above information yourself except for the client. If you pick the wrong client, the note has to be deleted. Then you can redo it in the correct chart. For group notes, the date cannot be changed at all.

If you need to edit the text fields on your note (presentation, intervention, response, referrals, follow-up) instead of having the note reverted to draft, consider using the Append Documents form. You can use this form to add information to the note without having it reverted to draft.
**Individual Progress Note Corrections**

Use the procedure below to have SC General Purpose Progress Notes and SC Med Service Progress Notes deleted or reverted to draft. Group notes act a little bit differently and there are different procedures for deleting and correcting Group Progress Note mistakes, which you can find in the next section.

Send your correction message to **askqi@santacruzcounty.us**

**Draft progress notes can only be deleted by the clinician who wrote the note.** See the section, “How to Delete a Draft Progress Note,” for more information. (See the next section on how to deal with draft group progress notes.)

If the client name is wrong, we will need to delete the note and you will rewrite it. The name cannot be changed once the note has been submitted.

For other changes, the note can be reverted to draft for you to correct and re-submit. Notes reverted to draft will appear in your My To Do’s.

Alternately, we can correct the information for you without reverting to draft. See the graphic on the previous page that explains what we can and cannot change for you.

Use the template below to provide information about the note(s). If you are re-entering your note, and not just having it deleted, copy and paste the information from your note into a Word document. That way you can paste it back into Avatar when you re-create your note.

**Progress Note Deletion and Revert to Draft Template (fill out completely)**

Client name & number:
Episode number & name:
Service Date:

**Data Entry Date and Time***:

Total Duration time:
Service code:
Is the episode still open (Y/N):
Clinician:

Action requested (delete, revert to draft, etc.):

**Reason:**

Is this a group note? (Y/N): N

*We might need the data entry date/time to distinguish your note from others in the chart. If your note is unique, then we don’t need this information.*
Santa Cruz Avatar

**Group Progress Note Corrections**

**Group Progress Note Deletions**

Send your correction message to askqi@santacruzcounty.us

For group note deletions we need information on the entire group, so that we can change the Group Count for the remaining notes. This is because of how Avatar calculates the time for Group Progress Notes.

Draft group progress notes cannot be deleted at all, either by the clinician, or by the help desk. If you need group notes deleted, put NA or VOID in the intervention field, and then finalize. (The “VOID” in the intervention field, helps us find the note.) Once the notes are finalized, we can delete them for you.

If the client name is wrong, we will need to delete the note and you will rewrite it. The name cannot be changed once the note has been started.

If the date is wrong, this cannot be changed. Either the entire group must be deleted and redone, or use the Append Documents form to explain the date error.

Use the template below to provide information about the note(s).

Copy and paste the template below into a message to askqi@santacruzcounty.us

If you are re-entering your notes, and not just requesting a deletion, copy and paste the information from your notes into a Word document. That way you can paste it back into Avatar when you re-create your notes.

**Group Progress Note Deletion Template (fill out completely)**

Client name & number:
Episode number & name:
Service Date:

Data Entry Date and time*:
Total Duration time:
Service code:
Clinician:
Action requested: Deletion
Reason:

Is this a group note? (Y/N): Y
How many people in the group?

*We only need the data entry date and possibly the data entry time if there are multiple notes in chart with the same service information, i.e. service code and total duration.
Please include the above information for every group participant. **You must finalize the note first and then request a deletion. We cannot delete draft notes. Put NA or VOID in the intervention blanks of the notes.** *We might need the data entry time if the client has gone to multiple groups in the same day. It may be the only way we can figure out which note to delete.*

### Group Progress Note Data Changes

Group Progress Notes cannot be reverted to draft for changes, as some data will disappear and cannot be added back in. We can change some items in the note for you. For other items, the note will have to be deleted and you will rewrite it.

### Group Progress Note Data Change Request (fill out completely)

- **Client name & number:**
- **Episode number & name:**
- **Service Date:**
- **Data Entry Date and time:**
- **Total Duration time:**
- **Service code:**
- **Clinician:**
- **Action requested:**
- **Reason:**
- **Is this a group note? (Y/N): Y**
- **How many people in the group?**

*We only need the data entry date and possibly the data entry time if there are multiple notes in chart with the same service information, i.e. service code and total duration.*

### Residential Service Charge Deletions

Use the template below to have Residential Service Charges deleted.

Send your correction message to askqi@santacruzcounty.us

### Residential Service Charge Deletion Template (fill out completely)

- **Client name & number:**
- **Episode number & name:**
- **Service Date:**
- **Service code:**
- **Data Entry Staff:**
- **Reason:**
Treatment Plan Deletions

Plans that are not valid (i.e. not signed by the client/guardian) can be deleted. If you need a treatment plan deleted, follow these instructions.

1) If the plan is still in draft, change the Plan Name so that it has the word INVALID in it somewhere. This helps the person who is deleting the plan.
2) If the plan is still in draft, finalize the plan. This ensures that no one in else adds any information to it, further complicating the situation.
3) Fill out the template below.
4) Send a message to askqi@santacruzcounty.us with the information in the template.

Treatment Plan Deletion and Revert to Draft Template (fill out completely)

Treatment Plan Form (pick one):
[ ] SC SUD Treatment Plan
[ ] SC MH Episodic Treatment Plan
[ ] SC MH Short Term Treatment Plan

Client name & number:
Episode number & name:
Plan Type:
EXACT Plan Name:*  
Authorization Start Date:
Clinician:
Action requested (revert to draft, other correction):
Reason:

*Plan name must be exact. We don’t want to delete the wrong plan!
Reverting Treatment Plans to Draft

Plans that are not yet signed by the client/parent/guardian (i.e. not valid) can be reverted to draft. Send a message to askqi@santacruzcounty.us requesting that the plan be reverted to draft. Use the template below to provide the information we need to evaluate your request.

Treatment Plan Deletion and Revert to Draft Template (fill out completely)

- Treatment Plan Form (pick one):
  - [ ] SC SUD Treatment Plan
  - [ ] SC MH Episodic Treatment Plan
  - [ ] SC MH Short Term Treatment Plan

- Client name & number:
- Episode number & name:
- Plan Type:
  - EXACT Plan Name:* 
- Authorization Start Date:
- Clinician:
- Action requested (revert to draft, other correction):
- Reason:

*Plan name must be exact. We don’t want to delete the wrong plan!

Reverting a Service Request and Disposition Log (SRADL) Back to Draft

SRADL’s can be reverted to draft. Once this is done, you can change any needed details, including the client name. The only things you cannot change in the draft SRADL is the Date of Request and the Program Name. Once your SRADL has been reverted to draft, you can also delete it from the pre-display. Fill out the template below and then send it in a message to askqi@santacruzcounty.us requesting it be reverted to draft.

Note that date of the SRADL and the Service Program cannot be changed. If the error is with one of these items, redo the SRADL and then request that the one with the wrong information be deleted.

SRADL Corrections Template (fill out completely)

- Service Program:
- Client name & number:
- Date of SRADL:
- Clinician:
- Reason:
Other Documents, Deletion and Revert to Draft

Some other types of documents besides treatment plans and progress notes can be deleted or reverted to draft. Send a message to askqi@santacruzcounty.us requesting that the document be deleted with the reason, date, staff name/number, and episode number.

Note that this template is not for scanned documents. See “Scanning Errors” for more information.

Document Deletion/Revert to Draft Template (fill out completely)
Form Type (e.g. Psychosocial Assessment, CANS/ANSA):
Client name & number:
Episode number & name (if applicable):
Date of form or note:
Date and time submitted:
Action (delete or revert to draft):
Clinician:
Reason:

Re-Opening Episodes

Episodes can be reopened. The most common reason is that a client has discharged, but there are still notes in draft that need to be completed. To have an episode re-opened, send a message to askqi@santacruzcounty.us with the information below.

Episode Reopening Template
Client name & number:
Episode number & name:
Reason for reopening the episode:

Once you have completed your notes or other documentation, use the Discharge form (or Pre-Admit Discharge form) to close the episode ASAP.

Deleting Episodes

Sometimes an episode is opened accidentally. If there is no data in the episode, it can be deleted entirely.

Before you send in your request, close the episode (using the Discharge form) so that no data gets accidentally entered into the episode. Then fill out the template below and send a message to askqi@santacruzcounty.us requesting that the episode be deleted.
**Episode Deletion Template**
Client name & number:
Episode number & name:
Reason for deleting the episode:

**Program Transfer for Episodes**

SUDS programs: Request a program transfer to move a client between SEQ to non-SEQ programs.

You may also request a program transfer if you have accidentally opened a client to a wrong episode and people have already started adding documentation such as progress notes. We can move all of the data in an episode into a new one, essentially changing the name of the new episode.

To request a program transfer, send a message to askqi@santacruzcounty.us with the information below.

**Program Transfer Template**
Client name & number:
Current Episode number & name:
Change Episode To:
Reason for Program Transfer:

**Change the Admission Date for an Episode**

You may request to change the admission date of an episode if you have accidentally opened the episode on the wrong date. Note that we cannot move a date forward if there are services that will end up prior to the new admission date.

To request an Admission Date Change, send a message to askqi@santacruzcounty.us with the information below.

**Request to Change Admission Date**
Client name & number:
Episode number & name:
Current Admission Date:
Change Admission Date To:
Reason for Changing Admission Date:
Scanning Errors

If a scanned document gets added to the wrong chart, it can be deleted. We need the following information to find the document and delete it.

Fill out this template completely and accurately. We need the entire name in the Document Description column to make sure we do not delete the wrong document.

Send a message to askqi@santacruzcounty.us requesting the deletion. Include in your message:

Scanned Document Deletion Template
Client name & number:
Document Category or Form Name*:
Document Description (be EXACT)**:
Document Date:
Episode:
Reason:

* e.g. CLN – Outside Records or MED – Lab Results
** This is the name the scanned document was given, e.g. 112510 Lab Result.

I have A LOT of corrections. Can I put them in a spreadsheet instead?

This is no problem as long as your spreadsheet has all the fields in the template. Also, please do not just send in a copy of information from the Service Activity Report. This does not have all of the information we need.
I finalized a document and forgot to route it to my supervisor. Can it be routed to her?

Yes and No. 😊 If you accidentally route a document to the wrong person, we can re-route your finalized document. We can also add approvers. Unfortunately, we can only change the name of the supervisor. If you forgot to route the document completely, we cannot route for you. If you did not route the document to anyone, ask to have the document reverted to draft. Then you can finalize it and route it to your supervisor. Use the template below to send a message to askqi@santacruzcounty.us

Document Routing/Rerouting Template

Document or Form Type (e.g. SC General Purpose Progress Note):
Plan Type (for treatment plans):
Client Name & Number:
Episode name/number:
Service Date (for progress notes):
Authorization Start Date (for treatment plans):
Assessment Date (for assessments):
EXACT Plan Name (for treatment plans):
Data Entry Date and Time:
Total Duration time (for progress notes):
Service code (for progress notes):
Clinician’s name and user number:
Reason for rerouting:
Action:

☐ Reroute to other supervisor. (Change who this document is going to.)
   Current supervisor on document:
   Supervisor to replace with:

☐ Add another Approver to the list of people who will receive document: