Avatar Questions & Answers

1. **Is the Lockout function timed limited?** Yes, it has not yet been determined how long the lockout time will be.

2. **By a specific program, what practitioners are linked to that program?** It is not clear what the question is. Currently, there are limited practitioners in the Sandbox. Would you like us to add the names of practitioners to the Sandbox?

3. **Assuming that the LE will be automatically associated with forms of a particular program, yes?** Forms are associated based on the user roles that we are in the process of creating.

4. **Will there be a User Manual for AVATAR both for PM and CWS?** The County is in the throes of creating training documents, and our goal is to have them to you in less than 45 days.

5. **How do you Toggle on and off?** Toggling is referring to moving from one open form or chart to another and to the home view. See the example below.

6. **Need more instructions on how to set up and arrange widgets to customize window.** Please see attached document.

7. **How to search for a client and provider to see if he/she is an existing client.** Most of the fields require you to search by last name in order to find the practitioner or clients. You can also search for client in the Search Clients field in the Client widget.

8. **I have not been able to access the Report Viewer at this time. Will this feature already be available in the testing room?** We are still working on which updates we need to have access to this, and want to determine if our staff will need this feature. Report Viewer needs to be installed on everyone’s computer so that they can view Crystal Reports in Avatar. For the GLP event, trainers will need to know how to launch a Crystal Report (the example I give is Master Client Inquiry) and navigate around it. Once they know one, they know them all. So they do need the report viewer installed and they need to be able to open the Master Client Inquiry and show how it works. Because you do not have this installed on your computer, we will need to send you the apps within the next 24-48 hours.
9. When asked to “demonstrate knowledge of Calendar icons” are they referring to the color coded squares on the bottom of the page (i.e. Out, Personal/Staff, etc)? The calendar icons question refers to the icons for a Draft progress note (“D”), a Final progress note (“F”), a recurring appointment (the arrow/circle), a missed visit (red X). There are others, but these are the ones trainers should know about.

10. For transfer of client into another program, how would you transfer from outpatient program into residential program and vice-versa? Didn’t seem like it was working. Since all ADP treatment is episodic, if a client transferred from one modality (say, residential) to another (outpatient), they would be discharged from the initial modality and admitted to the other. In the paper world, you’d have to do that, and I don’t think having Avatar makes any difference. We have to do CalOMS discharge from one, and admission to the other either way. I’m not even sure how useful the transfer form is for ADP, since the CalOMS admissions & discharges have to happen.

11. The programs don’t all have the correct type like outpatient vs residential associated. Is this going to be cleaned up before Go-Live? Also, a list of program names that you think need changing would help with that. For example, I noticed that “Fenix” is there, instead of ALTO South. All ADP programs in Avatar are Admission and Service programs. There are no associated programs like there is for MH. The only exception would be there are some “Gate” programs associated with INFOREFI. As noted with the Fenix example, additional program examples would help. That said, when UAT is finished, I think we will see a much cleaner database.

12. Is there an option for tracking a coordinator’s/facility’s billing load? This sounds like a supervisor report for all services provided by a program for a date range by practitioner, for example. This would be most appropriate as a report and would need a spec and would need to be submitted to the county for review and prioritization and then on to the report group for addition.

13. Once a note is finalized and submitted is there a mechanism (on the Medi-Cal side) to instantly deny the claim? Once a note is finalized, the service goes to the client ledger. The service is now managed in Avatar by financial eligibility, advanced billing rules; benefit plans, etc. The County would have to know the what is the situation that you would want a service to be denied by MCAL. Can you give us a scenario? The County does have a mechanism to NOT bill services to MCAL. In short, the answer is yes, a claim can be denied, however, the longer answer is warranted; what is the service code, when and why, and so forth.

14. Can calendars be viewed based on the client, not the practitioner? The Scheduling Calendar has several reports available via the blue links in the lower left-hand corner of the Scheduling Calendar. One of these is the Find Existing Appointments report that can show appointments by Client. In short, no, an end-user cannot filter the calendar by client, but they can report on client appointments.

15. When conducting a “Caseload Assignment” what designation should we be using for our MHSS Coordinators? Is it “therapist”? It is not clear what is an MHSS Coordinator or what they do. A therapist is reserved for licensed staff doing therapy with clients. Please send me more information.
16. Who is able to view the responses for accessing non-caseload clients? Can these be viewed within our organization? This data can be viewed via the Non Caseload Access Report. However, access to this report is controlled by rights granted by the County and who can see the report will be determined by user roles assigned.

17. What defines one’s “caseload”? Is it clients within your organization or any client that you may work with? The Avatar-only definition of “caseload” is the list of clients you have added to your MyClients widget. This can be any client. You can use this list of clients as a quick way to open their charts and to open forms for the clients from the home page. This is what “caseload” means in Avatar.

18. Are there any parameters for how many clients can be added to one’s caseload? In Avatar there are no parameters, the only restriction for what can be viewed without scrolling on the screen is the size of the widget on your home view.

19. To help us organize training groups by skill level, we would love to see the results of the “Basic Computer Skills” surveys from our staff. Is there a way to identify which staff member submitted which survey? 109 people responded and it was optional to identify oneself. The County also did not ask for the name of the organization, which will makes it even more difficult to identify who responded. If so, could we get the results from you? The County could create a survey monkey for your organization. Please let us know if this will help.

20. After the “test the trainers” process at the end of this month, what is the next phase? If we are moving into the “training our staff” phase, will the County help us secure a computer lab so we can train our staff? Yes we can assist you, and look into your agency using the computer lab at 1080 Emeline. You can contact Amy or Sandra to make arrangements. This is subject to availability. To support all the Watsonville agencies, could the County do an MOU with Cabrillo College in Watsonville, the Watsonville library, or some other agency that has a computer lab? Pursuing an MOU with a public entity is not an option at this time.

21. What is/will be the County’s system for supporting contractors, especially with tech support after we go live? The County will be providing technical support to our contractors as we do now. Sergio, Sandra and Amy will be available to provide technical assistance.

22. Regarding the transition from paper charts to electronic ones, could we “grandfather” open paper charts and continue with paper until the episode is closed (and therefore just submit new episodes to Avatar)? This will not be possible. If not, could we close the episode in the paper file and then reopen in Avatar? The existing information will be transferred from ShareCare to Avatar.