

Netsmart Sandbox Tour Guide Script

March

2013

This document is to be used in conjunction with the Netsmart Sandbox environment as a guide. Following the steps included in this guide will allow you to get a sense for the general workflow for your role and how you will interact with the Netsmart solutions, once your own system build is completed. It will provide you with a foundation for understanding the required data collection and making any design decisions associated with the project.



Avatar PM- Inpatient Intake Process

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Purpose

This workflow exercise will walk you through the basic steps of the admission process for an inpatient episode using Avatar. You will start at the beginning of the process with performing an admission for a new client and continue through the end of the process with adding an appointment for your client. This workflow will give you an overview of all the key steps in Avatar admission.

You will walk through the following steps:

• Admission (Inpatient)

You will admit a new client into an inpatient program.

• Financial Eligibility

You will create and maintain a prioritized list of guarantors for liability distribution for your client and episode.

Diagnosis

You will add a diagnosis record using DSM-IV and ICD-9 codes for your new client.

• Scheduling Calendar

You will add a new appointment for your new client.



Terminology

- Admission (Inpatient) the form utilized to admit clients into inpatient or partial hospitalization programs. Using this form will
 create an Inpatient or Partial-day Hospitalization episode for a client in Avatar
- Chart View a view for quick access to the client's stored medical record information. The Chart View is comprised of three main sections:
 - The Chart Widget View like the Home View, displays windows of information pertinent to the client and their
 overall status.
 - The Chart Overview located on the left side of the Chart View, the Chart Overview provides links to forms in Avatar pertinent to the user's workflow. This allows the user to quickly navigate to stored data and forms they use in their job on a daily basis for an individual client.
 - The Chart Inquiry View works in conjunction with the form links in the Chart Overview. When a form link is clicked
 by a user, the Chart Inquiry view becomes available to the user and they are able to see any stored data on file for
 the client for that specific form. From the Chart Inquiry View, a user can easily edit an existing record or add a new
 record
- Clinicians/Practitioners/Staff Persons that render services or treat clients directly.
- Diagnosis the form used to track and update a client's diagnosis record using DSM-IV and ICD-9 codes. The Primary Diagnosis established in this form is utilized as the primary billing diagnosis on claims.
- **Episode** In Avatar, a client is admitted into an episode of care. An episode starts with a new Admission (Inpatient or Outpatient) and ends with a Discharge that follows that Admission. Many client activities (services, assessments, treatment plans, progress notes) may happen within one episode.
- Financial Eligibility the form used to track a prioritized list of guarantors for liability distribution for the selected client and selected episode of care.
- Forms the data entry screens in Avatar that are used to track medical record information.
- Home View a user's main navigation screen. The Home View allows a user to view their caseload, search for clients, access forms, or navigate to the client Chart View.
- Scheduling Calendar Avatar functionality that provides the user the ability to manage appointments at multiple sites for staff members, clients and groups.
- Widgets windows of information that display information about key Avatar functionality, a client, a program, or your organization.



Logging into Avatar

- 1. Launch Avatar from the provided URL address.: https://sandbox.asp.ntst.com/plexus/pm
- 2. Click the **Start** button to launch the application.



- 3. Log in by selecting the **Server** you are going to log in.
- 4. Type "SAMPLE" in the **System Code** field.
- 5. Type in a clinical Username: INTAKE1, INTAKE2, INTAKE3, INTAKE4, or INTAKE5.
- 6. Type in the Password for the clinician username (they all use the same): INTAKE99.
- 7. Click the **Sign In** button.



Exercise Recap:

You have now logged into Avatar.

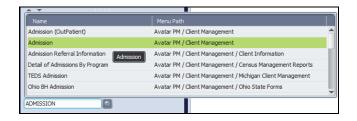


Admission (Inpatient)

Comment [LM1]: Split into its own script

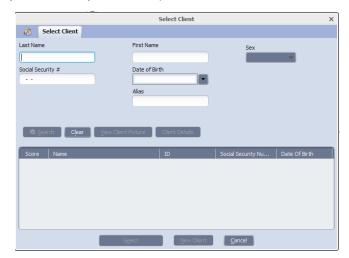
The Admission form is utilized to admit clients into an inpatient setting or partial hospitalization program. This will create an inpatient or partial hospitalization episode for the client in Avatar.

- 1. On the Home View, locate the Forms and Data widget.
- 2. In the Forms and Data widget, type "Admission" in the **Search Forms** field. Double click **Admission**.



3. The Select Client window will appear.

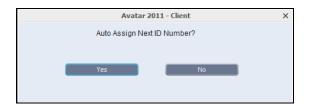
Note: Avatar requires that you search for the client you want to complete the admission record for. This ensures that the patient is not already entered into the system to avoid duplicate entries.



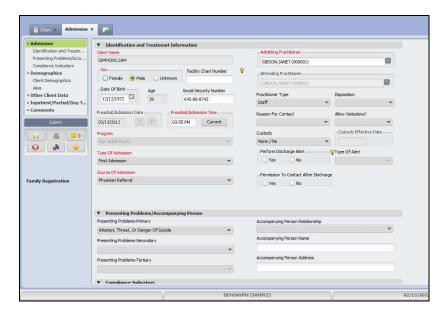
- 4. Enter the last and first name of a client you want to create.
- Click the Sex drop-down list. Select the sex of your client.
 Note: Avatar requires that three fields to be completed before search button becomes enabled. This ensures that there are not duplicate entries in the system.



- 6. Click the Search button.
- 7. Click New Client.
- 8. A message will appear asking if you want to auto assign the next ID number. Click Yes.
- 9. If you click No, you will need to manually assign a numeric identifier to the client.



- 10. Write down your client's assigned Avatar ID number & last name: _
- 11. The Admission form will open.



- 12. Enter a date of birth in the **Date Of Birth** field. Hit the **Tab** key.

 Note: Age will automatically populate in the **Age** field.
- 13. Enter a Social Security number in the **Social Security Number** field.
- 14. Enter the first day of the previous month in the **Preadmit/Admission Date.**
- 15. Click Current in the Preadmit/Admission Time field.

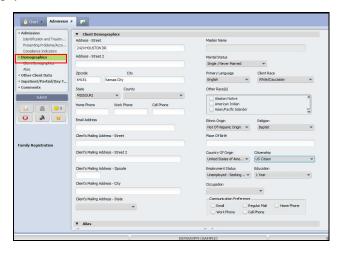


- 16. Click the Program drop-down list.
- 17. Select one of the following programs:
 - Inp. Adult Psych
 - Inp. Mature Adult Psych
 - Inp. Child Psych.
- 18. Click the Type of Admission drop-down list. Select First Admission.
- 19. Click the Source of Admission drop-down list. Select Physician Referral.
- 20. Type one of the following names in the Admitting Practitioner field:

Gibson, Janet

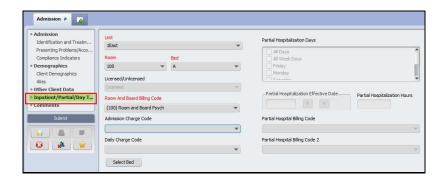
Blanchett, Jo

- 21. Select the practitioner from the drop-down list.
- 22. Type the same name in the ${\bf Attending\ Practitioner}$ field
- 23. Select the practitioner from the drop-down list.
- 24. Click on the **Demographics section** from the form tree on the left side of the screen.



- 25. Enter an address for your client. You may use 111 Center Rd Ann Arbor Mi 48105 Note: This information will carry forward to other forms.
- 26. Click the Inpatient/Partial/Day Treatment section in the form tree on the left side of the screen.





- 27. Click the Unit drop-down list. Select a unit.
- 28. Click the ${f Room}$ drop-down list. Select a room.
- 29. Click the **Bed** drop-down list. Select a bed.
- 30. Confirm Room And Board Billing Code is (100) Room and Board Psych. If not, click on the drop-down list and select (100) Room and Board Psych.
- 31. Click **Submit** to complete the form.

Exercise Recap:

You have now created a new client and placed the client into an inpatient episode in Avatar. Remember your client's name Avatar ID number as you will use it throughout the entire exercise.

Your client now has the following information saved in Avatar:

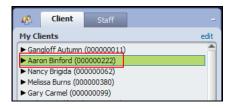
✓ Admission Record



Financial Eligibility

The Financial Eligibility form is used to associate the Client with a guarantor and determine their financial situation.

1. On the Home View, locate the **Client and Staff** widget. Double click the name of a client under **Recent Clients** to launch the client's chart view.



- 2. The client's chart overview will open. Here you can view the client's problems, vital signs, and episodes. It also displays the user's To-Do's for that client.
- 3. On the left side of the chart is the Chart Overview. The Chart Overview contains links to frequently used forms for a user's workflow.

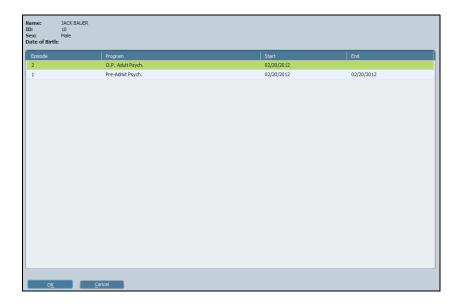


4. Click Financial Eligibility link in the chart overview on the left side of the chart screen in the Chart Inquiry view.





- 5. To navigate to the Financial Eligibility form, click **Add** in the Chart Inquiry view in the upper right hand corner.
- 6. The Episode Selection screen may appear. If not, continue at step #10.
- 7. Make sure the most recent client Episode is selected.
- 8. Click the OK button at the bottom of the screen.

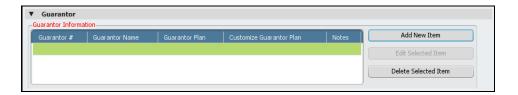


- 9. The Financial Eligibility form will open.
- $10. \ \, \text{Select the "Guarantor Selection" section from the form tree on the left side of the form.}$





- 11. Guarantor Selection is now selected; start in the "Guarantor" section.
- 12. Make sure the top line of the Guarantor information field is highlighted, if not click the **Add New Item** button to begin the process.



- 13. Enter the number 1 and select BCBS CO (1) in the "Guarantor #" field. Several fields will fill in on their own.
- 14. Select the No radio button in the "Customize Guarantor Plan" field. A confirmation window will appear, click the OK button.



- 15. Select the **Yes** radio button in the "Eligibility Verified" field.
- 16. Click the ${\bf T}$ button (for today) in the "Coverage Effective Date" field.



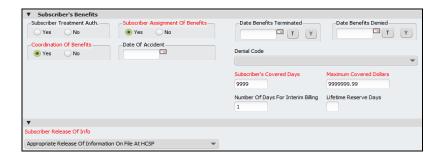


- 17. Scroll down the form to view the Subscribe sub-section.
- Confirm Self in the Client's Relationship to Subscriber field is populated. If not, select Staff in the Client's Relationship to Subscriber drop-down list.
- 19. Fill in the Address, Zip, City, State, and Social Security # fields. Note: If you completed some of this information in your client's admission record, it will pull forward into the Financial Eliqibility form.

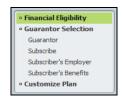


- 20. Next, go down to the ${\bf Subscriber's\ Benefits\ }$ section.
- 21. Select the Yes radio button in the Subscriber Assignment of Benefit's field.
- 22. Select the Yes radio button in the Coordination of Benefits field.
- 23. The covered days fields should be filled with 9's, this is fine, leave it.
- 24. Select Yes in the Subscriber Release of Info field.

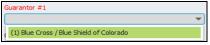




25. Click Financial Eligibility from the form tree on the left side of the screen.



- 26. Click the Guarantor #1 drop-down list.
- 27. Select (1) Blue Cross / Blue Shield.



28. Click the Submit button to complete the form.



Exercise Recap:

You have now associated your client with a guarantor and determined their financial situation.

Your client now has the following information saved in Avatar:

- ✓ Admission Record
- ✓ Financial Eligibility



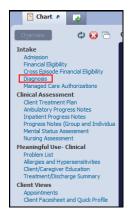
Diagnosis

The Diagnosis form tracks and keeps the client's diagnosis record up-to-date using DSM-IV and ICD-9 codes for a selected client. The Primary Diagnosis established in this form is utilized as the primary billing diagnosis on claims.

 On the Home View, locate the Client and Staff widget. Double click the name of a client under My Clients to launch the client's chart view.



- 2. The client's chart overview will open. Here you can view the client's problems, vital signs, and episodes. It also displays the user's To-Do's for that client.
- 3. On the left side of the chart is the Chart Overview. The Chart Overview contains links to frequently used forms for a user's workflow.



4. Click Diagnosis link in the chart overview on the left side of the chart. Clicking the link opens the Chart Inquiry view.

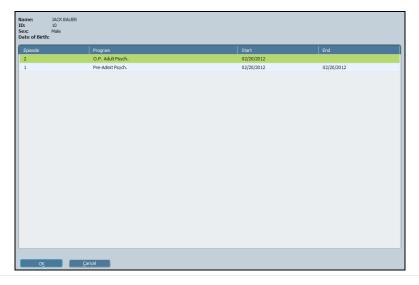




- 5. To navigate to the Diagnosis form, click **Add** in the Chart Inquiry view in the upper right hand corner.
- 6. The Diagnosis form will open.
- 7. If a Diagnosis has already been established, it will open here. Double click the highlighted diagnosis. If not, continue to step 8.

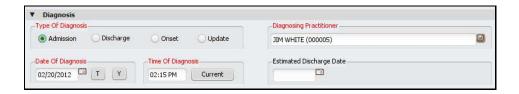


- 8. If your client is admitted into more than one episode, the Episode Selection screen will appear. If not, continue to step 11.
- 9. Make sure the most recent Episode is selected.
- 10. Click the \mathbf{OK} button at the bottom of the screen.

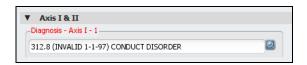




- 11. The Diagnosis form will open.
- 12. Select the Admission radio button in the "Type of Diagnosis" field.
- 13. Click the ${\bf T}$ button (for today) in the "Date of Diagnosis" field.
- 14. Click the Current button in the "Time of Diagnosis" field.
- 15. Type the last name of the diagnosing practitioner in the **Diagnosing Practitioner** field. In this example, Jim White or Janet Gibson.



- 16. Type "312.8 (INVALID 1-1-97) CONDUCT DISORDER" in the **Diagnosis Axis I 1** field.
- 17. Select 312.8 (INVALID 1-1-97) CONDUCT DISORDER.



- 18. Click the **Principal Diagnosis** drop-down list.
- 19. Select (312.8) (INVALID 1-1-97) CONDUCT DISORDER.



20. Click **Submit** on the form tree on the left side of the screen to complete the form.



Exercise Recap:

You have now associated a diagnosis, Conduct Disorder, with your client.

Your client now has the following information saved in Avatar:

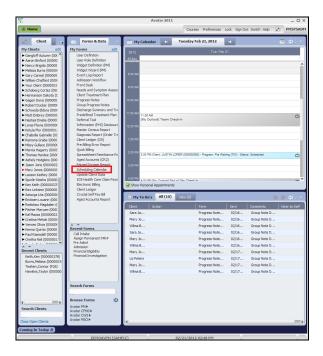
- ✓ Admission Record
- ✓ Financial Eligibility
- ✓ Diagnosis



Scheduling Calendar

Scheduling Calendar gives the user the ability to manage appointments at multiple sites for staff members, clients, and groups. In the Scheduling Calendar, you can create appointments, check clients in and out for their appointments, and set up individual appointments or group appointments. You can also assign multiple practitioners to an appointment.

1. Click on Scheduling Calendar under My Forms, in the Forms & Data widget on the Home View.



2. The Scheduling calendar will open.

Exercise Recap:

You have now navigated to the Scheduling Calendar. In the next exercise, you will schedule an appointment for your client.

Your client now has the following information saved in Avatar:

- ✓ Admission Record
- √ Financial Eligibility
- ✓ Diagnosis

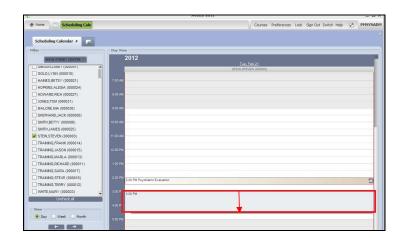


Scheduling an Individual Appointment

1. You are going to add a new appointment on today's date for clinician Steven Stein. Select Steven's name in the Clinician list on the left side of the Scheduling Calendar.



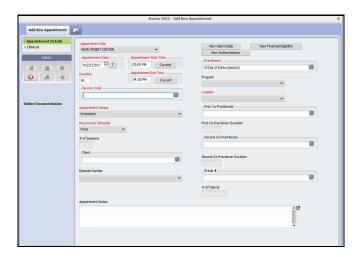
- 2. Click on the calendar at the desired appointment time.
- 3. Drag the mouse to the desired end time. A gray box will appear.



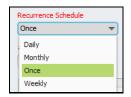
4. Right Click on the appointment and select **Add Appointment.**



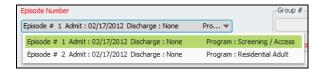
5. The Add New Appointment form will open.



- 6. Type "1000" in the service code field.
- 7. Click the Recurrence Schedule drop-down menu. Select Once.



- 8. Type your client's last name in the Client search field.
- 9. Click the **Episode Number** drop-down menu. Select Episode 1.



- 10. All other required fields will be automatically populated.
- 11. Click the **Submit** button on the left side of the screen to save your appointment information.



Exercise Recap:

You have now scheduled an appointment for your client.

Your client now has the following information saved in Avatar:

- ✓ Admission Record
- √ Financial Eligibility
- ✓ Diagnosis
- ✓ Scheduled Appointment



SANDBOX NOTES	