SANTA CRUZ COUNTY AVATAR INFORMATION NOTICE

TOPIC: New Question *Approval to Leave Confidential Message* Added to Update Client Data Form

NEW VOICEMAIL QUESTION

Avatar Form(s), Process and/or Users Affected

Date	5/4/2020
Avatar Form(s)	**Update Client Data**
Change	Question added to the *Update Client Data* form. Check to see if this question has been answered and if not, talk to the client and then update the information in the form, Update Client Data.
Users Affected	**All clinical staff** and anyone who leaves appointment reminder messages for clients.

Approval to Leave Confidential Message
- Yes
- No

Introduction

During this time of COVID19 Shelter in Place, it is especially important that we keep in touch with clients and that they attend needed appointments. To help with this, the question, *Approval to Leave Confidential Message* has been added to the Avatar form, Update Client Data. It has always been in the Admission form, but the problem was, the Admission form only gets filled out once. With the question added to the Update Client Data form, the question can be asked at any time and any user can update the form. In addition, there are changes in the type of information you can leave in a message due to the COVID 19 emergency, even if the client has not answered the question.

Background Information/Current Procedure

When leaving a message for an appointment reminder (or other types of messages with confidential information), unless the client consents in advance, you cannot leave any identifying information, that is, information that would reveal that this is a behavioral health appointment. This includes things like the name of the provider, the clinic name, and even the phone number of the clinic.

The reason for this is to protect the client's confidentiality in case someone other than the client hears the message.

The question in the Admission form, *Approval to Leave Confidential Message, permits leaving more information.* If the question is noted as "Yes" then treatment care information such as the type of appointment (e.g. psychiatry, therapy) or the BH staff's number, may be left for the client.

Change in Procedure

The question **Approval to Leave Confidential Information has now been added to the _Update Client Data_ form.** Previously, this question was only in the Admission Form, which meant that if the question was missed at admission, there was no other opportunity to enter it into Avatar.

Please check to see if this question has been answered and if not, ask clients whether or not they want to approve. Then add the information to the form, Update Client Information.

In the Update Client Data form, find the added question in the section, "Electronic Contact Information."

▼ **Electronic Contact Information**

Client's Cell Phone
831-555-9999

Client's Work Phone
831-555-8888

Client's Preferred Phone
831-555-1234

Client's Email Address
gigglybear@mailstop.net

Communication Preference
◯ Email   ◯ Regular Mail   ◯ Home Phone
◯ Work Phone   ◉ Cell Phone

Approval to Leave Confidential Message
◉ Yes   ◯ No

Updated Procedure

1) **Before leaving a reminder message for a client, check to see if the question *Approval to Leave Confidential Message*, has been filled out.** Do this by opening the client chart, clicking "Update Client Data," and looking for the question in the chart view. It's going to be at the bottom of the form."

   If the question was answered in either the Admission form or the Update Client Data form previously, you will see it in the chart view for Update Client Data.

   If you don't see the question at all, it means that it has not been answered. (You can also open the form, Update Client Data and view the information that way.)
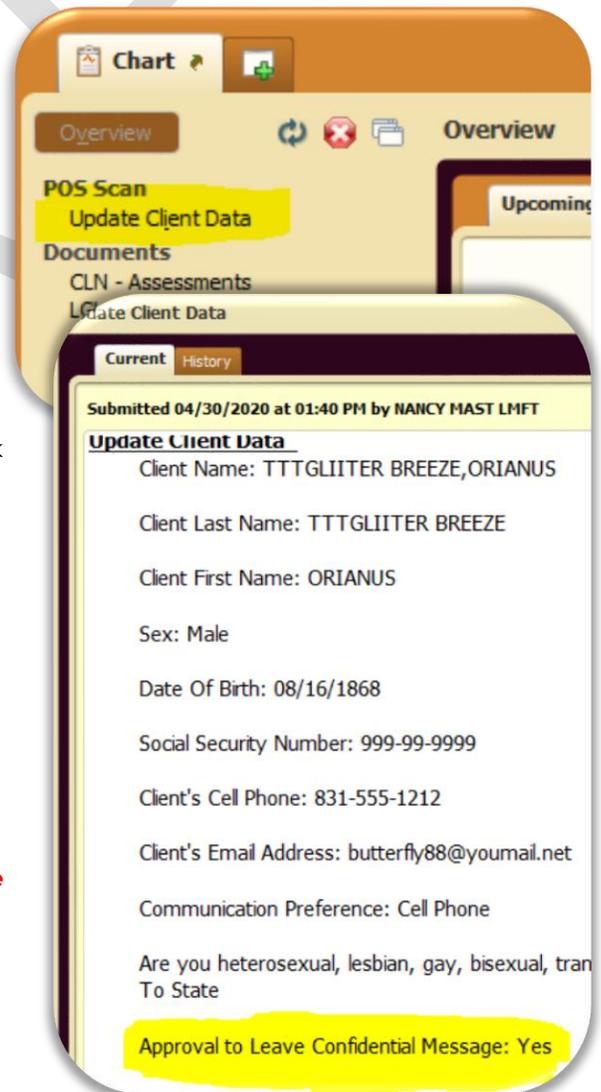
   IF YOU CANNOT FIND THE LINK: Depending on how your charts are set up, the link to the form might be in a different spot than shown at right, or it could possibly be missing. If you do not see a link to the form, see the section, *How to Add the Update Client Data Form to Charts*, below.

2) **If the question, *Approval to Leave Confidential Message*, has been answered, and the client has consented ("Yes") you can proceed to leave a message with potentially identifying information, such as the type of appointment (e.g. psychiatry).**

3) **If the client has answered "No," then do not leave confidential information, EXCEPT for the following information listed below.**

   (Note that this is a change from normal procedure, where you cannot leave any identifying information without consent.)

   During COVID19 emergency, QI is allowing staff to leave a message with minimal confidential information, even if the client answers "No" but ONLY THE INFORMATION LISTED BELOW. (This is subject to change after the COVID19 emergency is over.)

   - Client name
   - Provider name (without credentials like LCSW or MD)
   - The time and location of the appointment—provided the location doesn't reveal the type of appointment (For example, "1400 Emeline." is appropriate; "Santa Cruz Behavioral Health Clinic" is not.)

📋 Chart

Overview   Overview

POS Scan
  Update Client Data   Upcoming
Documents
  CLN - Assessments
  Update Client Data

Current   History

Submitted 04/30/2020 at 01:40 PM by NANCY MAST LMFT

Update Client Data
Client Name: TTTGLIITER BREEZE,ORIANUS

Client Last Name: TTTGLIITER BREEZE

Client First Name: ORIANUS

Sex: Male

Date Of Birth: 08/16/1868

Social Security Number: 999-99-9999

Client's Cell Phone: 831-555-1212

Client's Email Address: butterfly88@youmail.net

Communication Preference: Cell Phone

Are you heterosexual, lesbian, gay, bisexual, tran
To State

Approval to Leave Confidential Message: Yes

4) **If the question *Approval to Leave Confidential Message* has not been answered at all, do not leave a message with identifying information in it, except for the information listed above.**

5) **Once (and if) the client consents to us leaving confidential information in reminder messages, open the form, Update Client Data, and click "Yes" in the question *Approval to Leave Confidential Message*.**

> **Confirm client contact information.** When you talk to the client about their appointment reminder preferences, you can use this as an opportunity to confirm that the client contact information in Avatar is correct. Keeping client contact information up to date is always a good business practice, since this helps ensure the reminder goes to the right person.

Information For Admissions

Programs should already be asking clients about reminder message preferences when the client begins receiving services. When filling out the Admissions form, make sure to answer the question, *Approval to Leave Confidential Message*. If you answer the question in the Admission form, the information will auto-populate into the Update Client Data form.

For Reception and Other Administrative Staff

1) Before leaving a reminder message for a client, check to see if the question *Approval to Leave Confidential Message*, has been filled out. See the *General Procedure* section above for more information.

2) If the question has been answered, and the client has consented ("Yes") you can proceed to leave a message with potentially identifying information.

3) If the client has answered "No," then do not leave confidential information, except for the following.
   - Client name
   - Provider name (without credentials like LCSW or LMFT)
   - The time and location of the appointment—provided the location doesn't reveal the type of appointment (For example, "1400 Emeline." is appropriate; "Santa Cruz Behavioral Health Clinic" is not.)

4) If the question has not been answered, do not leave a message with identifying information in it and let the client's provider know that they should have a conversation with the client about this – OR – Ask the client about their preference and enter the information in the Update Client Data form. Talk to your supervisor about which procedure is right for your program.

5) Once (and if) you receive permission from the client to leave confidential information, open the form, Update Client Data, and click "Yes" in the question *Approval to Leave Confidential Message*.

For Clinicians

QI's recommendation is to touch base with your current caseload and check in with them regarding their allowance of leaving confidential information on a voicemail. Then, as new clients are assigned to you, check the form, Update Client Data to see if the question, *Approval to Leave Confidential Message*, has been answered. If not, have a conversation with the client about reminder messages and enter the information in the form, Update Client Data.

Talking to Your Client About this Topic

The conversation should involve your explaining the risks and benefits of protected health information (PHI) being left in a reminder message. Emphasize that this information is limited to appointment information only. We would only be leaving enough information to help the client understand necessary appoint information such as the location of appointment, who it is with, etc… You might want to give some examples of the kind of information that we would be sharing.

You can ask the client about any concerns they might have about leaving PHI and emphasize this is a choice that they have. Explain to the client that if they do not want PHI being left in messages, that it is okay, and that their preference will be noted in their chart.

Can I bill for this?

Maybe.

When you talk to your client about their reminder message preference, this could be a billable service if you are helping the client understand the information, work through any anxiety around the issue and/or problem solve around whether or not they would like this option.

If your conversation involves your providing clinical interventions, then feel free to write a progress note with a billable service code. Otherwise, you do not need to write a progress note, and should simply note the client's response in the form, Update Client Data. In other words, if there is no clinical service, you do not have to write a progress note.

Workflows

County QI is not recommending any specific workflow for getting the question, *Approval to Leave Confidential Message*, answered or inputting this data into Avatar. You are encouraged to implement a workflow that is best for your program. Some suggestions are:

1) Managers/supervisors have a discussion around workflows and include clerical/reception staff. Make sure your plans include how line staff are going to get information about new procedures.
2) Make sure staff that do Admissions, a) are aware that the question is in the Admission form and, b) are making efforts to ask clients about this (and input the information).
3) Staff may need help looking for the question in the chart. Identify other staff that can help with this.
4) Consider asking the client about their reminder message preferences at the same time you verify that their contact information is up to date.
5) Treatment providers may have questions regarding talking to their clients about this. Make sure they have the chance to discuss and develop strategies.

How to Add the Update Client Data Form to Charts

If you do not see the form, Update Client Data in your Avatar charts, you can add it. For information about how to add forms to client charts, see the Avatar Clinicians Manual and look for the section, *Add a Form That is Not Listed to Your Chart View*.

For More Information Contact

The QI help desk at askqi@santacruzcounty.us

Resources

See the Santa Cruz Avatar webpage. This Information Notice is available for future reference.

The easy way to get to the web page is to type Avatar into the Search Forms blank when you are in Avatar. Click on Avatar Resources and this will launch the web page.

http://www.santacruzhealth.org/hsahome/hsadivisions/behavioralhealth/avatarresources.aspx
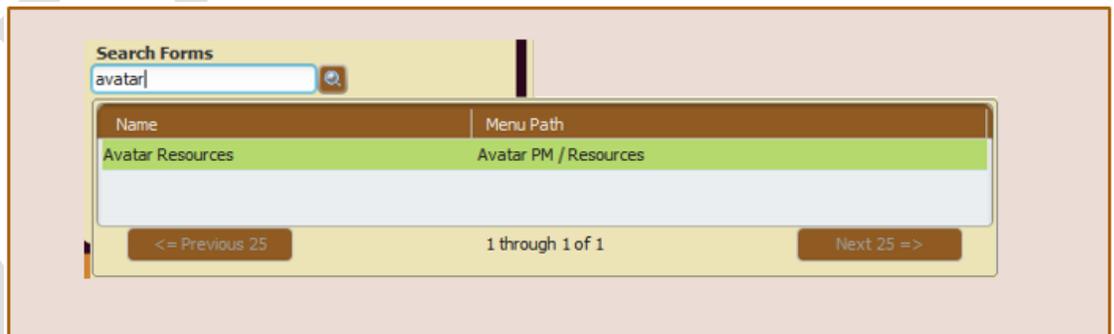
About the Update Client Data Form

The Update Client Data form has questions about the client such as address, language and phone number. It can be updated at any time, but the primary clinician should look over the information in it periodically to make sure it has the most recent information.