

Instructions for MHSА Programs Avatar UR

These instructions are to be utilized in conjunction with the "Sacramento County Electronic Utilization Review Tool MHSА Addendum" (03/29/19)

Section A Traditional Healing Practices- The following information can be located by running the "Progress Note Abstract" report from the left side of the client's chart overview or by running the "Client Services Report (Single Client)."

Section B Specialized Services- The following information can be located within progress notes by running the "Progress Note Abstract" report from the left side of the client's chart. Collateral documents reflecting specialized services may also be found by viewing the scanned documents.

Section C Family/Caregiver Services and Supports- Any services provided to Family/Caregivers should be available in a separate paper chart and should not be scanned into Avatar. The separate paper chart should be made available by the Agency to the reviewer.

Section D Client Services and Supports- The following information can be located within progress notes by running the "Progress Note Abstract" report from the left side of the client's chart.

Section E Benefits Acquisition- Benefits Acquisition services can be located within the progress notes by running the "Progress Note Abstract" or by running the "Client Services Report (Single Client)". Additional documents are typically uploaded into the Avatar scanned document category "Benefits Acquisition."

Section F Progress Notes- There are several reports to view for progress notes.

- You may run the "Progress Note by Service Chart" to view notes in consecutive order.
- Another option is to open a tab and use the "Progress Notes Client Report" to view notes.
- If you are looking for specific types of notes, you can choose the "Progress Note Search" function and search for notes using a specific work or phrase.
- When reviewing notes, please ensure to choose the appropriate episode and date range for the review.

Section G Mode 60 Flexible Funding- Mode 60 Flex Funds can be located by running the "Client Services Report (Single Client)." Flex Fund Expenditures will generate at the bottom of the report.

Section H Full Service Partner (FSP) Only- Full Service Partnership documents are typically uploaded into the Avatar scanned document category "Assessments."

Section I Client Housing Plan- Client Housing Plans may have been uploaded into the following Avatar scanned document categories: "Client Plans- Not Avatar Generated" or (Post 3/29/19) "Homeless Documentation."