

## Additional Episode Information Tip Sheet

This Tip Sheet may change as our trainings and systems are updated. Please visit our website <https://dhs.saccounty.gov/BHS/Avatar/Pages/Avatar.aspx> for the most updated version. If any additional help is needed you can contact us at [Avatar@saccounty.net](mailto:Avatar@saccounty.net).

The Additional Episode Information form can be used to enter a provider start date, enter LOCUS information, enter a service coordinator, and enter school information for youth clients. The steps to enter a Provider Start Date, Service Coordinator and School Information are shown below.

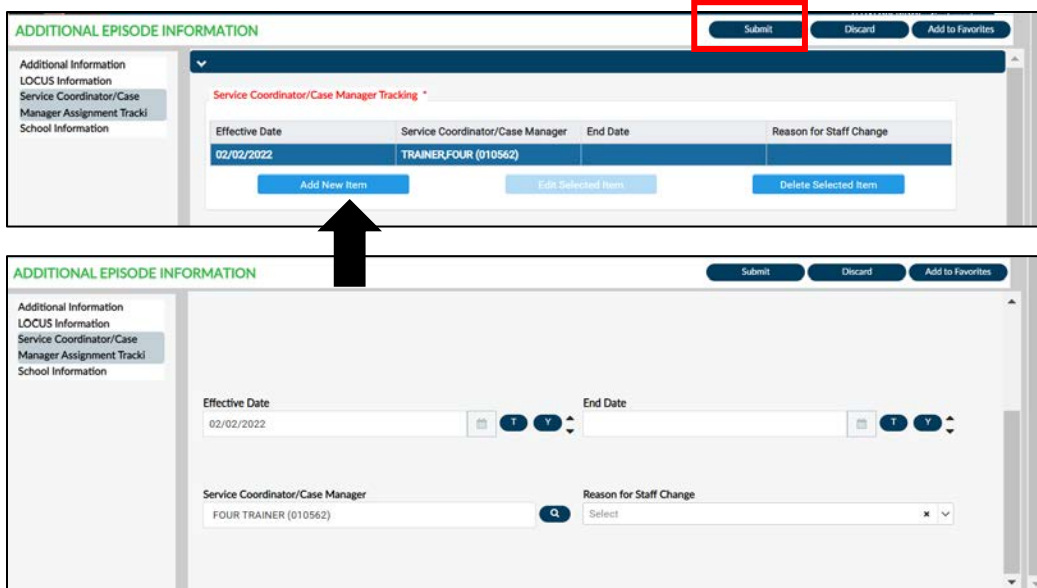
### Additional Information

Mental Health providers will need to enter a Provider Start Date. This is typically the first face to face contact with the client, however refer to your contract monitor or a supervisor on what date is appropriate for your program. The Admission Date will be greyed out, this is the date the client was admitted into your program.

### Service Coordinator/Case Manager Tracking

Note: All clients are required to have a service coordinator assigned to them during their time at your program. This form will not add a client to a clinician’s My Clients list. Admin staff can use the Attending Practitioner form to add a client to a clinician’s My Clients list.

1. Open the “Additional Episode Information” form in Avatar
2. Go to the “Service Coordinator/Case Manager Tracking” section of the form
3. Use the multi-iteration table and “Add New Item”
4. Enter the “Effective Date” of when the client was assigned to the Avatar user
5. Enter the “Service Coordinator/Case Manager” which should be the Avatar user
6. Click “Submit” to save and close the form



7. If the Avatar user should no longer have the client assigned go into the form and add an end date and a reason for change. Do not delete the record unless it was done in error. If you need to add a new service coordinator, click Add New Item and add a new service coordinator for that client.
8. You can run the Detailed Outpatient Census NEW report to see which clients are missing service coordinators at your agency.

Avatar NX Report Viewer - Google Chrome

sacramentonrxvnp.netsmartcloud.com/AvatarNX-ReportViewer/View.aspx?baseUrl=https%3A%2F%2Fsacramentonxuatrest.netsmartcloud.com%2Favatar-nx-services%2F...

Avatar NX Report Viewer 2022.02.00 Close Report

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Main Report

**Sacramento County DBHS**  
**Detailed Outpatient Census**  
**APCC-TWC-14th Ave 34CNPZ**  
**Patients with an Episode Open Between 2/17/2022 and 2/17/2022**

Client Name ~ Client ID	Admit	LOS	Start	EP	Service Coordinator	Primary Guar / Policy	Second Guar / Policy
	3/10/17	1805	4/25/17	1		DMH - SD/MC	MHSA
	5/11/20	647	7/31/20	6		DMH - SD/MC	MHSA
	2/25/21	357	3/2/21	2		DMH - SD/MC	MH County Fund
	12/27/19	783	12/31/19	3		DMH - SD/MC	MHSA
	8/5/21	286	5/18/21	11		DMH - SD/MC	MH County Fund
	9/23/21	147		1	No SC Assigned		
	9/3/15	2359	9/24/15	1		DMH - SD/MC	MHSA
	8/17/20	549	9/2/20	2		DMH - SD/MC	MH County Fund
	5/16/17	1738	6/7/17	30		DMH - SD/MC	UMDAP (CLIENT)
	7/11/08	4969	7/11/08	12		DMH - SD/MC	MHSA
	2/26/15	2548	3/18/15	2		DMH - SD/MC	MHSA

9. Active Client Initial Assessments and Active Client Final Assessments reports will group your clients by the service coordinator so you can easily see the client's assigned to you.

Note: If you are trying to add a client to a clinician’s My Client’s list you will use the form Attending Practitioner. Admin staff will have access to this form.

### School Information

1. Open the “Additional Episode Information” form in Avatar
2. Go to the “School Information” section of the form
3. Use the multi-iteration table and “Add New Item”
4. Enter the school the youth is attending. The search field includes Sacramento County schools. There is also an option for Non Sacramento County School and Not Enrolled.
5. Enter the approximate Start Date the youth started at this school.
6. Enter the End Date once the youth is no longer at that school. Do not delete the record unless it was done in error.

School	Start Date	End Date
T. R. Smedberg Middle (Elk Grove Unified)	09/01/2021	