MHE 87 BEHAVIORAL HEALTH CONTRACTING AGENCY AVATAR USER-PRACTITIONER REQUEST FORM INSTRUCTIONS

PURPOSE OF MHE 87 FORM

This form provides the Santa Cruz County Behavioral Health department with the information needed to add or modify users in Avatar, which is the Behavioral Health Department's electronic medical records system. Use this form when there is a new user, a change is needed to a user's account, or the account needs to be deactivated.

To find the link to the MHE 87 form, go to the Santa Cruz County Avatar Webpage. The link is near the bottom of the page.

Forms/Resources

- Authorization to Release Confidential Information - English Spanish
- *New!* Avatar Access Request Forms
    - Frequently Asked Questions (FAQs): MHE85 and MHE87 MHE10
    - MHE 10: County MHSAS Employee Questionnaire
    - MHE 87: Avatar User-Practitioner Request Form Contractor Agency

GENERAL INSTRUCTIONS

For more detailed instructions, see the section, LINE INSTRUCTIONS FOR MHE 87.

NEW HIRE (NEW AVATAR USER) – submit form within 3 business days of confirmed hire

If the user is a Practitioner, include a copy of the license/certification/registration, which should include the number and the expiration date AND complete all three sections of the form.

- If the user is not a practitioner, complete sections 1 & 2 only.
- Follow new hire instructions (this section) for a current employee who has a change in job duties and now needs access to Avatar (they never had it before).
- Once completed, email to HSA_BHCredentialing@santacruzcounty.us for processing.
- County will create user profile and access within 5 business days.
- Once the new user has been added (or updated) an email will be sent with log in instructions.

CHANGE TO STAFF INFORMATION – submit form within 3 business days of change

Follow this procedure if staff gets a promotion, gets licensed or moves to a different program or workgroup.

- Complete sections 1 & 2 of the MHE 87.
- After filling out sections 1 & 2, send to HSA_BHCredentialing@santacruzcounty.us for processing.
- New License: Attach New License/Credentialing/Registration status with submitted proof of license/certification/registration when you email your request.

- License Renewal: Attach License/Certification/Registration renewal (with new expiration date).
- Expiration/Revocation of License or Associate Registration – i.e. license is no longer valid/active

  If a staff member neglects to renew their license and it expires (or license is revoked for other reasons), you MUST inform the County QI department immediately (AskQI@santacruzcounty.us), so that the user profile can be changed to that of a non-licensed person. There are certain activities, including therapy, diagnosing, and completing an MSE, that only a licensed person or LPHA may perform. If an unlicensed person performs these activities, this is fraud (illegal). Services billed after expiration of the license will be denied.

  Once the license is again in good status, submit a new MHE 87 and then the staff person's profile can be changed to reflect the new status. (County will update the user profile within 5 business days.)

- Other Changes to Staff Information:
  - Taxonomy Code Change
  - Change in Service/Admission Programs (i.e. clinician has a job change and needs different programs to write notes)
  - Change in level of Avatar Access
  - Change in Job Role/Functions
  - Name Change
  - County will update user profile within 5 business days.

DEACTIVATION – submit form within 3 business days of termination or expired credentials

- Complete section #1 of the MHE 87 form only.
- Send to HSA_BHCredentialing@santacruzcounty.us for processing.
- Request a deactivation for staff no longer working for program/agency.
- If License/Certification expires and is no longer valid/active AND user should be deactivated, request a deactivation. If the user will continue working but as an "unlicensed" staff, then see #2 above.
- For temporary leaves and vacations, you do not need to fill out this form, but may use the Avatar form Quick User Update to temporarily deactivate the account. This is a good idea for supervisors who co-sign documents. Temporarily deactivating the account prevents other users from routing documents to the supervisor for co-signature.
- County will update user profile and access within 2 business days.

TIPS FOR COMPLETING AND SUBMTTING THE MHE 87 FORM

Completing MHE 87 the form: Please read the questions thoroughly. If you need help answering questions, see the Line Instructions in the next section of this document. Please fill out all questions in the applicable sections. Do not leave any blanks. If a question does not apply, enter "NA."

Submitting the form: Submit the MHE 87 to HSA_BHCredentialing@santacruzcounty.us. If the user is a clinician, attach an electronic copy of the license, certification or registration. See instructions for items 5 & 6 below for more information.

Allow five business days for processing.

If the form is incomplete, or if proof of license is missing processing will be delayed.

LINE INSTRUCTIONS FOR MHE 87

SECTION 1: GENERAL INFORMATION

NEW HIRE: Check if user is a new hire. If not a new hire, but you are submitting the MHE 87 to request a change in the user's set up, click the box the "change" question instead.

DATE OF HIRE: We must have a date of hire in order to add a user to Avatar. If this date is missing, we cannot process the request. It is OK to put an approximate date if you are not sure, or if the date changes, let us know and we can fix it.

PRACTITIONER: Check if user is a practitioner. See below for definition.

CHANGE: Check if user is already in Avatar, but there are changes needed to the account. Examples: a practitioner was recently licensed; a user needs access to a certain form; a user is promoted to supervisor.

DATE (OF CHANGE): The date that the change takes effect. For example, the date a user is promoted to supervisor.

BRIEFLY EXPLAIN REASON…: Explain the change. Examples: a practitioner was recently licensed; a user needs access to a certain form; a user is promoted to supervisor.

DEACTIVATE: Check if user has left your agency. If this is a temporary leave of absence with an expected return date, you may not need to submit the MHE 87, but simply deactivate the user, using the form Quick User Update. Once the employee returns, you can re-activate them using the same form. See the Avatar Supervisor Manual on the Avatar Webpage for more information. FOR DEACTIVATION, ONLY FILL OUT SECTION 1.

DATE (OF DEACTIVATION): This is the date the clinician should be deactivated. This date might be in the past but do send in the deactivation request ASAP.

EXPLAIN DEACTIVATION: Don't forget to explain the deactivation request and fill in questions 9, 9A, 9B.

What is a Practitioner?

In Avatar, a Practitioner is someone who provides direct services and/or provides clinical supervision for those who do. A practitioner writes progress notes and other clinical documents in Avatar. A practitioner might also be a clinician who does not write clinical documentation themselves - but provides direct clinical oversight and supervision to those who do, and co-signs clinical documents for their supervisees. Examples of staff who are not practitioners might be someone who provides clerical support, an office assistant, an accountant, or a manager who does not provide direct services and does not supervise people who provide direct services.

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1. & 2. First Name & Last Name: Enter the employee's name. Be careful not to mix up first and last name. Make sure spelling is correct.

3. Middle Name or Initial: If the user has a common name, please provide a middle name or at least a middle initial.

4. Date of Birth: If DOB is not available, you may leave this question blank, but provide it as soon you can. This is especially important if the user has a common name, so that users in Avatar do not get mixed up.

5. & 6. NPI Number & Taxonomy Code: If the user is not a practitioner, enter "NA" for these questions. **If user is a practitioner, do not submit form unless user has an NPI number and an ACCURATE Taxonomy code. Verify NPI/Taxonomy at:** https://npiregistry.cms.hhs.gov/. **Create an NPI or Update Taxonomy at:** https://nppes.cms.hhs.gov/#/

(See What is a Practitioner above for information about practitioners in Avatar.)

About NPI Numbers and Taxonomy Codes:

The NPI (National Provider Identifier) number and its associated Taxonomy Code are required for all users who are practitioners. Without this, billing cannot be submitted, and reimbursement cannot be received (i.e. your agency won't get paid). **If a practitioner does not have an NPI number or an accurate/updated Taxonomy Code, do not submit the MHE 87.** The account will not be added until the clinician has an NPI along with a matching and accurate Taxonomy code.

(See the appendix at end of the document with a list of commonly used taxonomy codes.)

Before you submit the MHE 87, check to make sure the Taxonomy Code is correct. As practitioners move through their careers, taxonomy codes might change. For example, a user might have a "counselor" taxonomy code initially. The user then goes to school and becomes an associate, at which point the NPI registration will need to be updated to reflect the new license. To check whether or not a practitioner has the correct taxonomy code, go to the NPPES NPI Registry Lookup site at https://npiregistry.cms.hhs.gov/. Enter the NPI number and click search to see the taxonomy code. If it is not accurate, the taxonomy code must be updated before submitting the MHE 87.

To create an NPI number, or update a taxonomy code, go to the NPPES (National Plan & Provider Enumeration System) website at https://nppes.cms.hhs.gov/#/

This link provides more information about NPI numbers: https://www.cms.gov/Regulations-and-Guidance/Administrative-Simplification/NationalProvIdentStand

This link provides more information about taxonomy codes: https://www.cms.gov/Medicare/Provider-Enrollment-and-Certification/MedicareProviderSupEnroll/Taxonomy

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7. Agency, Team and/or Division: Enter the necessary information to help us understand where this staff person works. (E.g. entering "Encompass" is not sufficient.) If you are at a large agency, you must specify the location or program where the user works (e.g. Encompass, Youth Services OP or Janus, Methadone).

8. Access to BH, SUDS or both: Indicate whether user will be accessing Mental Health, Substance Use Disorder Services or both.

9. Job Description: Enter the appropriate job description for the user. If you have answered the question correctly, a person who does not work for your agency should have a good idea of what the user's job is.

9A. Supervisor of other staff? If the user is a supervisor, we need this information so that we can connect the supervisor to the people they supervise. There are certain forms and functions in Avatar that need the supervisor

name for an individual user, such as the Supervisor Compliance Report. Also, if the name of the supervisor changes for any user, we need that information so that we can update Avatar.

9B. If this is a deactivate request for a supervisor… This question is used when one supervisor leaves or changes jobs, and a new supervisor takes over. See above for more information about why we need this information.

10. Name of another employee who does the same job: This helps us make sure we have the user's account set up correctly.

11. Any Specialty Access Required? If the choices in this question are not sufficient to help us understand what access the user needs, describe, in the question "Notes/Comments" in Section 3.

12. Name of Supervisor(s): Enter the name of the user's supervisor(s). If there is more than one supervisor, indicate who these people are, and explain. For example, one supervisor is a clinical supervisor, who is cosigning progress notes, and the other supervisor in an unlicensed line supervisor.

13. Email address: This should be the user's work email.

SECTION 2: PRACTITIONER INFORMATION

See What is a Practitioner for more information about practitioners.

1. Using Avatar calendar(s)? This question applies to practitioners that use the Avatar Scheduling Calendar. Currently, this only applies to certain County staff.

If yes, allow practitioner to see other practitioner calendars? Supervisors, Access workers, and clinicians who might be scheduling appointments for other people, may need to see another person's calendar. Most users do not have this privilege.

2. Social Security Number: This is required for audit purposes. If you have problems with email encryption because the form contains a SSN, you may leave this question blank and send the SSN in a voicemail or Avatar Staff Message.

3. Gender: This question helps us audit whether we are fulfilling state and federal requirements for providing diverse staffing.

4. Ethnicity: This question helps us audit whether we are fulfilling state and federal requirements for providing diverse staffing.

5. Languages Spoken: This question helps us audit whether we are fulfilling state and federal requirements for providing services in threshold languages for Santa Cruz County.

6. Office Address, City, Zip Code: User's main worksite. If you are unsure, use information from your "main office." We cannot add the user to Avatar without this information. (The Zip code and phone number are "red" questions for us.)

7. Office Phone Number: User's contact number. If you are unsure, use the phone number for the user's main worksite, or your "main office." We cannot add the user to Avatar without this information.

8. Is Practitioner Licensed, Certified or Registered? Examples: ASW, LMFT, RADT, MA.

9. <u>Practitioner Category for Coverage:</u> Select the most applicable category.

10. <u>License/Certification/Registration Authority:</u> Out-of-state boards, licensing authorities, SUDS credentialing body (e.g. BBS or CCAPP)

11. <u>Provide License# or Certification# or Registration:</u> **You must provide a copy of the license.** This may be a copy of the actual paper license, or a PDF from the registry or licensing body (e.g. California BBS). Make sure that the license information is visible (type, initiation date, expiration date, clinician name, etc…).

12. <u>Effective Date for License, Certification, or Registration:</u> This is the date the clinician was initially licensed, not the start date for the current licensure period. The licensure or registration website should have this date.

13. <u>Expiration Date for License, Certification, Registration:</u> When the current license expires, or the end of the current licensure cycle.

14. <u>Is the Practitioner a Prescriber?</u> If yes, you must provide DEA Number, Expiration Date, Degree and Year of Degree.

15. <u>Does contract/provider staff need Waiver Application?</u> A Waiver is needed when a pre-licensed clinician (AMFT, ASW, APCC, PsyA) will be functioning as an LPHA (Licensed Professional of the Healing Arts), performing functions such as entering diagnoses and mental status exams. Check what applies for the user, if applicable.

If an MHRS application is needed, see question 16.

16. <u>Is an application for Mental Health Rehabilitation Specialist needed?</u> An MHRS is an unlicensed staff person who is able to perform certain activities, including writing progress notes without the required co-signature. The county will grant the MHRS based on the staff member's education and years of experience in a relevant field. Check "Yes" to receive an application for an MHRS. Processing time for the MHRS is 2-4 weeks.

17. <u>Program Associations:</u> This question is for Practitioners only. The question tells us which programs the clinician will need when writing progress notes. DO NOT simply enter "all programs." Remember, there are hundreds of programs in Avatar, not just the ones for your program. If you are not sure which programs the user needs, and you are a supervisor, see the form, Practitioner Enrollment, where you have "read only" privileges. On the first page of the form, near the bottom, is the question "Program Association," that has a list of all programs in Avatar.

SECTION 3: COMPUTER APPLICATION ACCESS

Most of Section 3 will not typically apply to contract users, except to click, "AVATAR."

APPENDIX: TAXONOMY LIST FOR BEHAVIORAL HEALTH PROVIDERS

Below is a list of commonly used taxonomy codes. This list is not exclusive. If you find another taxonomy code that you think applies, check with the County QI Dept to see if it will work.

PSYCHIATRY	
Description	Number
Addiction Medicine	2084A0401X
Addiction Psychiatry	2084P0802X
Forensic Psychiatry	2084F0202X
Geriatric Psychiatry	2084P0805X
Psychiatry	2084P0800X

NURSE PRACTITIONER AND RN	
Description	Number
Registered Nurse	163W00000X
Addiction Reg Nurse	163WA0400X
Lic. Vocational Nurse	164X00000X
Lic. Psychiatric Tech	1647G00000X
Psychiatric MH Nurse	163WP0808X
Nurse Practitioner	363L00000X

CLINICAL STAFF – LICENSED AND UNLICENSED		
Description	Number	Definition
Counselor	101Y00000X	Use for BH staff who do not have any lic.
Mental Health Counselor	101YM0800X	Use for PsyA or Psychological Assistant
Addiction Counselor	101YA0400X	Use for Registered & Certified
Licensed Marriage and Family Therapist	106H00000X	Use for LMFT and AMFT
Licensed Clinical Social Worker	1041C0700X	Use for ASW and LCSW
Social Worker	104100000X	Use for ASW and LCSW
Licensed Professional Clinical Counselor	101YP2500X	Use for APCC and LPCC
Psychologist	103T00000X	
Addiction Psychologist	103TA0400X	
Clinical Psychologist	103TC0700X	
Counseling Psychologist	103TC1900X	
Occupational Therapist	225XM0800X	
Case Manager	171M00000X	Unlicensed staff performing case management primarily.

Reference Sources: http://www.wpc-edi.com/reference/codelists/healthcare/health-care-provider-taxonomy-code-set/