

SANTA CRUZ COUNTY
MHE87 SANTA CRUZ COUNTY BEHAVIORAL HEALTH
CONTRACTING AGENCY AVATAR REQUEST FORM (MHE87) 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 to the MHE 87 form is near the bottom of the page.

Avatar User Account Forms

Use these forms to request new Avatar accounts for new staff members, and to request changes and updates to existing user accounts.

- [MHE 10: County MHSAS Employee Questionnaire - MHE10 FAQs](#) Use for County Employees only.
- [MHE 87: Avatar User-Practitioner Request Form Contractor Agency - MHE 87 Instructions](#) Use for Contractor Employees only.
- [MHE 85: Avatar Practitioner ID Request Form Contractor Agency](#) Use for Practitioner billing only. (Practitioner does not use Avatar.)

GENERAL INSTRUCTIONS

For more detailed instructions, see [LINE INSTRUCTIONS FOR MHE 87](#) starting on next page.

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

If the user is a Practitioner, 1) include a copy of the license/certification/registration, which should include the number and the expiration date AND 2) complete all three sections of the form.

- If the user is not a practitioner, complete sections 1 & 2 only.
- Follow new hire instructions for a current employee who has changed jobs and now needs access to Avatar (they never had it before).
- Once completed, send the completed MHE 87 (along with any license information if needed) 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 to the person(s) who submitted the request, 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. (The user may need an updated taxonomy code

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depending on the license change, before you send in the MHE 87. See the section *About NPI Numbers and Taxonomy Codes* for more information.)

- 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 staff person bills as licensed, 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 that need an MHE 87
 - 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

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 *Expiration/Revocation of License or Associate Registration* 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 deactivate within 2 business days.

TIPS FOR COMPLETING AND SUBMITTING 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.

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: This is the date the clinician should be deactivated.

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

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

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. Someone who is not a practitioner would possibly be 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.

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.

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5. & 6. **NPI Number & Taxonomy Code:** Enter “NA” and then skip these questions if the user is not a practitioner. **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 the section *What is a Practitioner* above for more information about how practitioners work in Avatar.

For help changing a taxonomy code, see How to [Change Your Taxonomy Code](#) on the Santa Cruz Avatar Web Page.

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.

If you are unsure about which taxonomy code to pick, see the NUCC web page for a list of codes and descriptions: <https://taxonomy.nucc.org/>

See the [appendix](#) at the end of this document for information about various “counselor” codes, which can be tricky.

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/NationalProviderStand>

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

7. **Agency, Team or Division:** Enter the necessary information to help us understand where this staff person works. Entering “Encompass” is not sufficient. If you are at a large agency, you must specify the location or program where the user is working, for example, Encompass, You Services OP or Janus Methadone.

8. **Access to BH, SUD 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 general 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

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user, such as the Supervisor Compliance Report. Also, if the supervisor changes for any user, we need that information so 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 set up correct.

11. Any Specialty Access Required?: If the choices in this question are not sufficient to help us understand what access the user needs, make sure you describe, in the email you send, what access is needed.

12. Name of the Employee's 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 is an unlicensed line supervisor.

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

SECTION 2: PRACTITIONER INFORMATION

See *What is a Practitioner* for more information about practitioners.

1. Is user a practitioner in Avatar? Click "Yes" if user is a person who enters clinical documentation in Avatar, such as progress notes. Note, in rare cases, programs have clerical users enter information for a practitioner. If this is the situation, explain in your request.

2. Social Security Number: This is required for audit purposes.

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.

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. Is Practitioner a Clinical Trainee? Clinical trainees are individuals who are in a graduate program, studying toward clinical licensure. They have not yet graduated, and are not licensed. The scope of practice for clinical trainees is expanded from that of an unlicensed person. They function similarly to a licensed person, and can bill for activities such as psychotherapy that are not allowed for unlicensed staff. Clinical trainees must be under the supervision of an LPHA and actively working toward their graduate degree. For more information about this program, contact the Santa Cruz County QI department at askqi@santacruzcountyca.gov.

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- 9A. Clinical Trainee Supervising LPHA: Clinical trainees must have a supervising LPHA who cosigns their progress notes.
- 9B. Clinical Trainee Graduate School / Program / Discipline: Enter the name of the school (e.g. San Jose State University), the program (e.g. marriage and family therapy), and the discipline, if it is not obvious from the program name.
10. Practitioner Category for Coverage: Select the most applicable category.
11. License/Certification/Registration Authority (e.g. California BBS or CCAPP): Credentialing authority that furnished the license, certification, or registration.
12. Provide License# or Certification# or Registration: You must provide a copy of the license as proof. A copy or photo of the actual paper license, or a PDF from the registry or licensing body (e.g. California BBS or CCAPP) is acceptable. Most mental health and physical health licenses can be found through the [California Department of Consumer Affairs \(DCA\) License Search website](#). Most substance use treatment counselor licenses can be found through the [California Consortium of Addiction Programs and Professionals \(CCAPP\) website](#). Make sure that the license information is visible (type, initiation date, expiration date, clinician name, etc...). **New practitioners will not be added to Avatar until proof of licensure or registration is received.**
13. Effective Date for License, Certification, or Registration: 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.
14. Expiration Date for License, Certification, Registration: When the current license expires, or the end of the current licensure cycle.
15. Is the Practitioner a Prescriber? If yes, you must provide DEA Number, Expiration Date, Degree and Year of Degree.
16. Does contract/provider staff need Waiver Application? This question is for out-of-state clinicians working on becoming licensed in California. For example, and MFT moves from Michigan to California. The clinician already has a license in Michigan, which is not applicable in California. The clinician working on becoming licensed in California. A clinician in this status may work under a waiver for up to three years, after which, the clinician reverts to unlicensed status.
17. Is an application for Mental Health Rehabilitation Specialist needed? If yes, in addition to checking this box, follow-up with an email to County QI at, HSA_BHCredentialing@santacruzcounty.us, to request an application.
18. Program Associations: 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." There are hundreds of programs in Avatar, and we need specific information to set your clinician up properly. 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 this section will not typically apply to contract users, except to click, "AVATAR." Some prescribers might need access to prescribing software such as OrderConnect.

APPENDIX: COMMONLY USED “COUNSELOR” TAXONOMY CODES

Type of Counselor	Preferred Taxonomy Code	Also Acceptable as the Taxonomy Code (but not preferred)*
CADC (SUD Counselor)	101YA0400X - Addiction (Substance Use Disorder) Counselor	171M00000X - Case Manager/Care Coordinator
Other SUD counselors (e.g. SUDRC, RATC)	171M00000X - Case Manager/Care Coordinator	101YA0400X - Addiction (Substance Use Disorder) Counselor
Unlicensed MH counselors who do not have an MHRS (not for SUD counselors)	172V00000X (Other Service Providers - Community Health Worker)	172V00000X (Other Service Providers - Community Health Worker)
MHRS	171M00000X - Case Manager/Care Coordinator	171M00000X - Case Manager/Care Coordinator
Certified Peer Specialists	175T00000X (Peer Specialist) (Must have certificate)	175T00000X (Peer Specialist) (Must have certificate)
Note: Do not use 101Y00000X – Counselor, or 101YM0800X Mental Health Counselor which are reserved for certain Masters level licenses (LPCC/APCC, LMFT/AMFT).		*If the clinician already has a taxonomy code in this column, you do not have to change it, but if this is a new code, use the code in the Preferred Taxonomy Code column.