**Santa Cruz Avatar**

# Avatar CSI Basic "How To"

## - Table of Contents –


**Admission Form** ..... 2

**Update Client Data** ..... 3

**CSI Information** ..... 3

**Diagnosis Form** ..... 4

**Open a new diagnosis form and add the already completed information from the most recent diagnosis in the chart to the blank form.** ..... 4

**Complete the Additional CSI Questions on the Second Tab, Additional Diagnosis Information** ..... 5

**Discharge Form** ..... 6

**Add a Form That is Not Listed to Your Chart View** ..... 6

**Add a Form That is Not Listed to Your Chart View** ..... 10

**CSI Cheat Sheet** ..... 11

# Santa Cruz Avatar

## INTRODUCTION

California State Information (CSI) data involves certain demographic questions about your client, such as language, disabilities and legal status. All counties are required to collect this information. Failure to do so can lead to loss of revenue from the state, so it is very important that these questions get answered.

CSI information is added to the client's chart at intake and then updated annually.

CSI Data questions are primarily in the CSI Admission form. Other CSI questions are found in other admission documents. There are also a few CSI questions on the discharge form.

We gather CSI data in five separate forms:

1) Admission form
2) Update Client Data
3) CSI Admission (It's called, "CSI Information," in the CSI Widget)
4) Diagnosis Form
5) Discharge Form

## Admission Form

Do not confuse this form with the CSI Admission form, which is different.

You must make every effort to answer all questions on the Admission Form, even those that are not red/required. Some CSI questions are not red/required for situations where it is impossible to get the information at intake. The client may be psychotic, impaired due to substances or uncooperative. If a minor, the guardian may not be available. If you cannot get all of the CSI Admission questions answered at intake, use the form, Update Client Data, at a future date, to complete the data set.

# Santa Cruz Avatar

## Update Client Data and CSI Information (CSI Admission) Forms (Client Info and Missing CSI Widget)

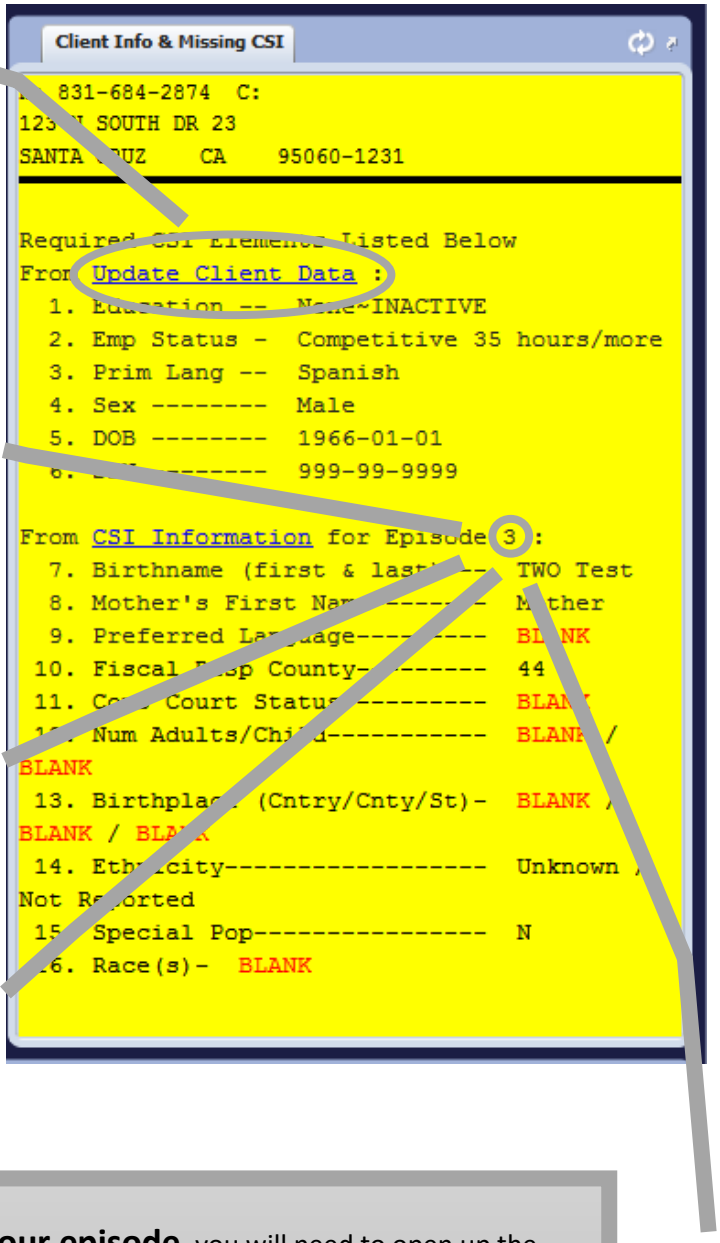
The Client Info & Missing CSI Widget contains links to forms that have CSI questions.

❶ **Click Update Client Data to open the form, update/add data as needed, then click, "Submit." This data tends to not change a lot, so if it has already been filled out by someone else, all you may need to do is just click "Submit."**

❷ ***Look at the CSI widget to see which episode the "CSI Information" part of the widget is pointing to.*** **In the picture at right, you can see that the widget is pointing to Episode #3.**

❸ **If this is your episode, click CSI Information to open the form, update as needed, then click "Submit."**

❹ **If this is not your episode, you will have to complete CSI Information in a different way.**




❺ **If the widget is not pointing to your episode**, you will need to open up the form from the chart view.

1. **In the list of forms on the left in the chart, click, CSI Admission.** If you don't see this form, you will need to add it to your charts. See the end of this document on how to do this.
2. **Click "Edit"** to open the form.
3. **Fill in questions** and update info as needed, **then click "Submit."**

# Santa Cruz Avatar

## Diagnosis Form

*There are a few CSI questions on the second tab of the diagnosis form. If you are not an LPHA, consult with your supervisor on how this will get filled out.*

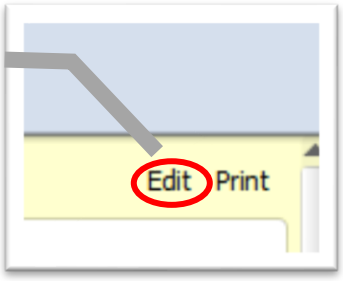
*These instructions assume there is already an existing Diagnosis, in your episode, for this client. If there is not a current diagnosis, you will need to complete the entire diagnosis form, rather than following these update instructions.*

*If you need more information on completing an Avatar Diagnosis, see the Avatar Clinicians Manual on the Santa Cruz Avatar Resource Webpage.*

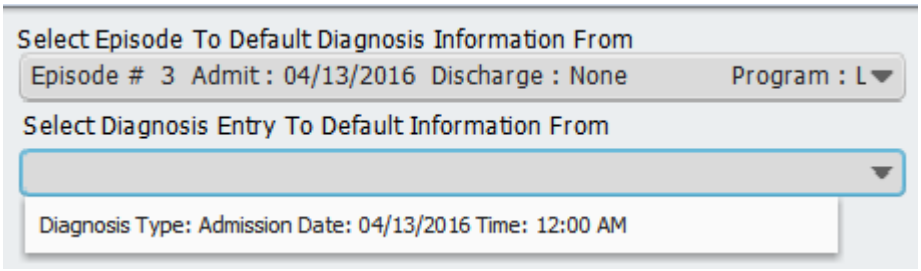
**Open a new diagnosis form and add the already completed information from the most recent diagnosis in the chart to the blank form.**

1. In the chart, Click on the "Diagnosis" link and then click "Add" in the, to open a blank Diagnosis Form. DO NOT CLICK EDIT.

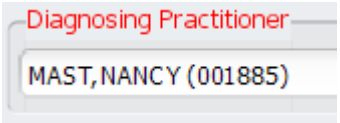
**DO NOT CLICK EDIT.**
**You must open a blank diagnosis form first to do a diagnosis update.**




2. **Type of Diagnosis** = Update
3. Enter the **current** date and time for the **Date of Diagnosis** and the **Time Of Diagnosis**
4. **Select Episode To Default Diagnosis Information From:** Select your episode or program.
5. Once you select your default diagnosis, you will get a popup warning you, "All unsaved data will be lost. Do you want to continue?" **Click, "Yes."**
6. **Select Diagnosis Entry To Default Information From:** Select the most recent diagnosis. The diagnoses in the list are labelled with the date and time they were entered.




7. The previous diagnosis you have selected will be populated into the Diagnosis table.
8. The name of the person who completed the diagnosis you are copying will be in the "Diagnosing Practitioner" field. If this was not you, change it to your name.

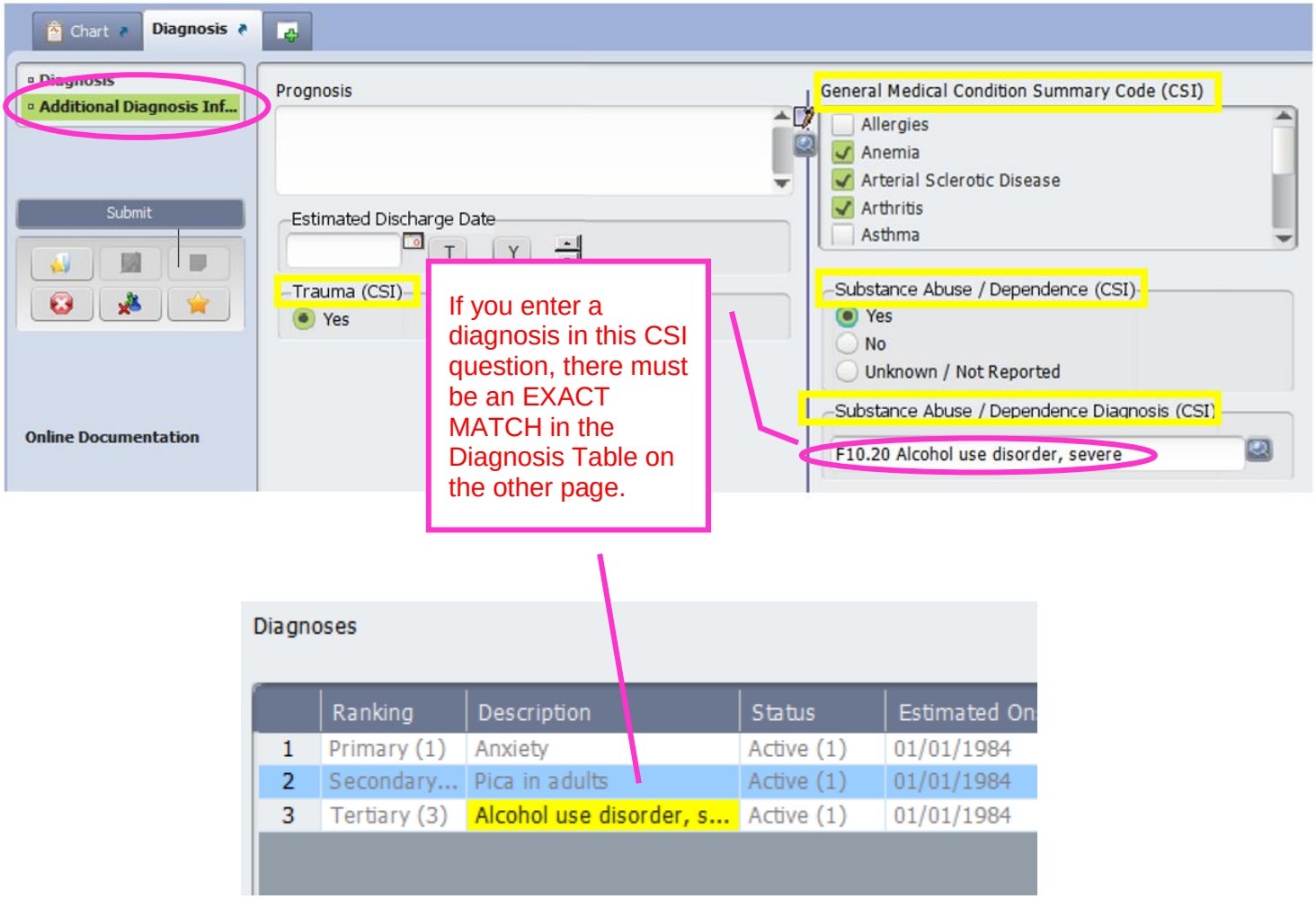


# Santa Cruz Avatar

## Complete the Additional CSI Questions on the Second Tab, Additional Diagnosis Information

1. Click on the tab, “Additional Diagnosis Information at upper left.”
2. The questions you need to **answer, all have "(CSI)" at the end of the question**. Ignore the other questions.

3. If the client has a substance abuse diagnosis, when you enter it in the CSI question, make sure this diagnosis is also in the diagnosis table in the first tab.



# Santa Cruz Avatar

## Discharge Form

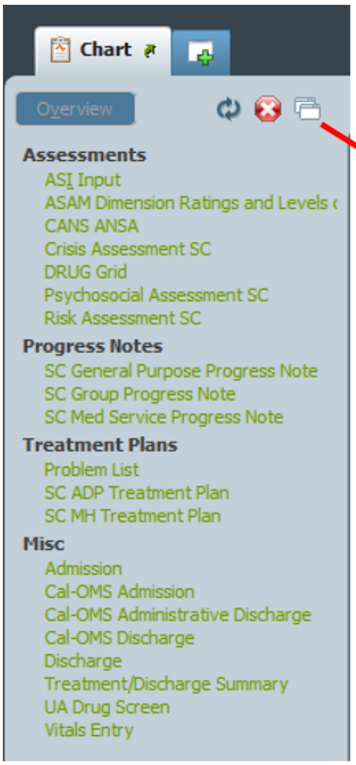
There should usually only be a few CSI questions on the discharge form that need to be filled out. Most of these questions will be auto filled from information that has been added to the Admission and CSI Admission forms. However, check to make sure that the prefilled data is accurate, and update any information as needed, such as the client's address and phone number.

There are also a few CSI questions that you won't see on any other forms that relate specifically to discharge, and that you must answer:

1. Type of Discharge (e.g. AWOL, Admit to Inpatient)
2. Smoking Status Assessment Date (and its accompanying smoking status question)
3. The patient Status Code (where did client discharge to?)
4. Discharge Legal Class (e.g. 72 hour evaluation, Voluntary)

## Add a Form That is Not Listed to Your Chart View

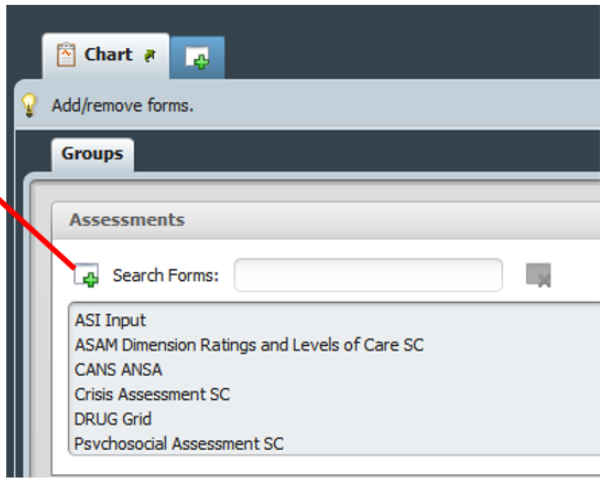
If you need to add a form that is not listed in your Chart View, use the following procedure.



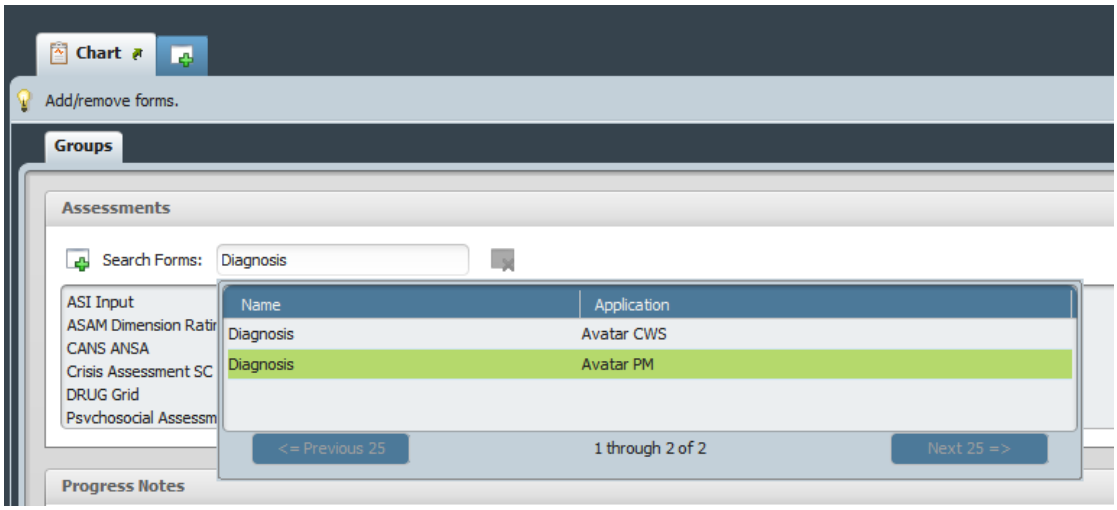

In this example, the Diagnosis form is not in the Chart View. When you look at the forms listed on the left hand side of the chart, you cannot see the diagnosis form.

**To add a form to the chart**, first click on the "Customize Forms" symbol at upper left. This will take you to the "Add/Remove Forms" area, where you can add forms to the list at the left of the Inquiry View.

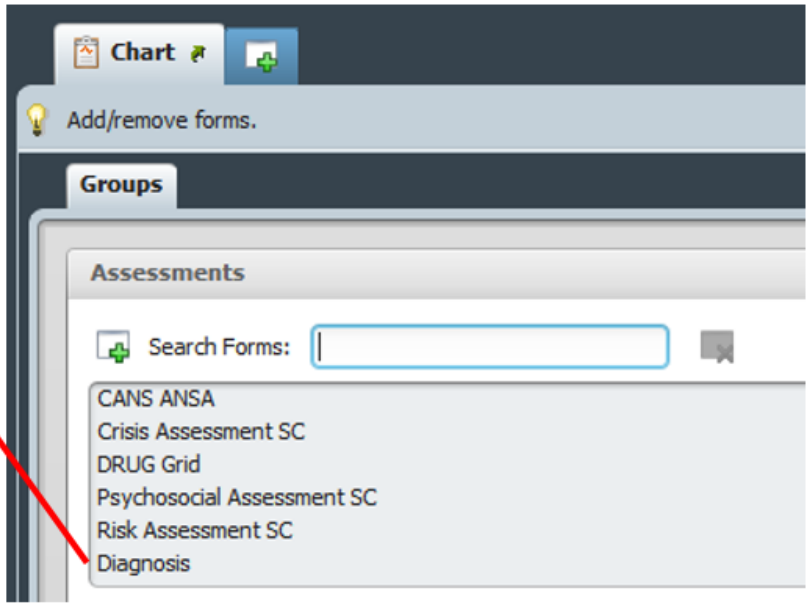
Next, find the section to which you want to add a new form. In this example, let's add the Diagnosis form to the Assessment group. Click the little green "+" underneath the word "Assessments" to add a form to the Assessments group. A "Search Forms," field will open up.



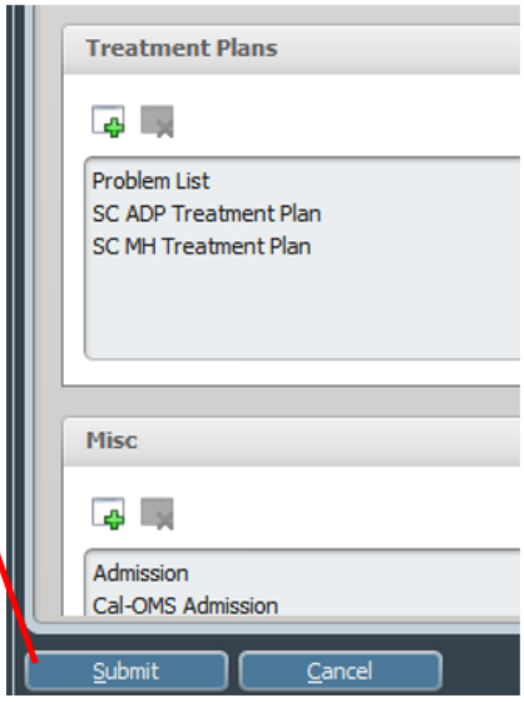

Type in the word "Diagnosis" in the blank provided. A list of forms matching what you typed in will pop up. The diagnosis form is unique in that there are two form paths. Double click on the form that says, "Avatar PM," under, "Application." (If you select the CWS version, it won't stay in the chart. The PM version will.)



The diagnosis form has been added to the Assessments group.

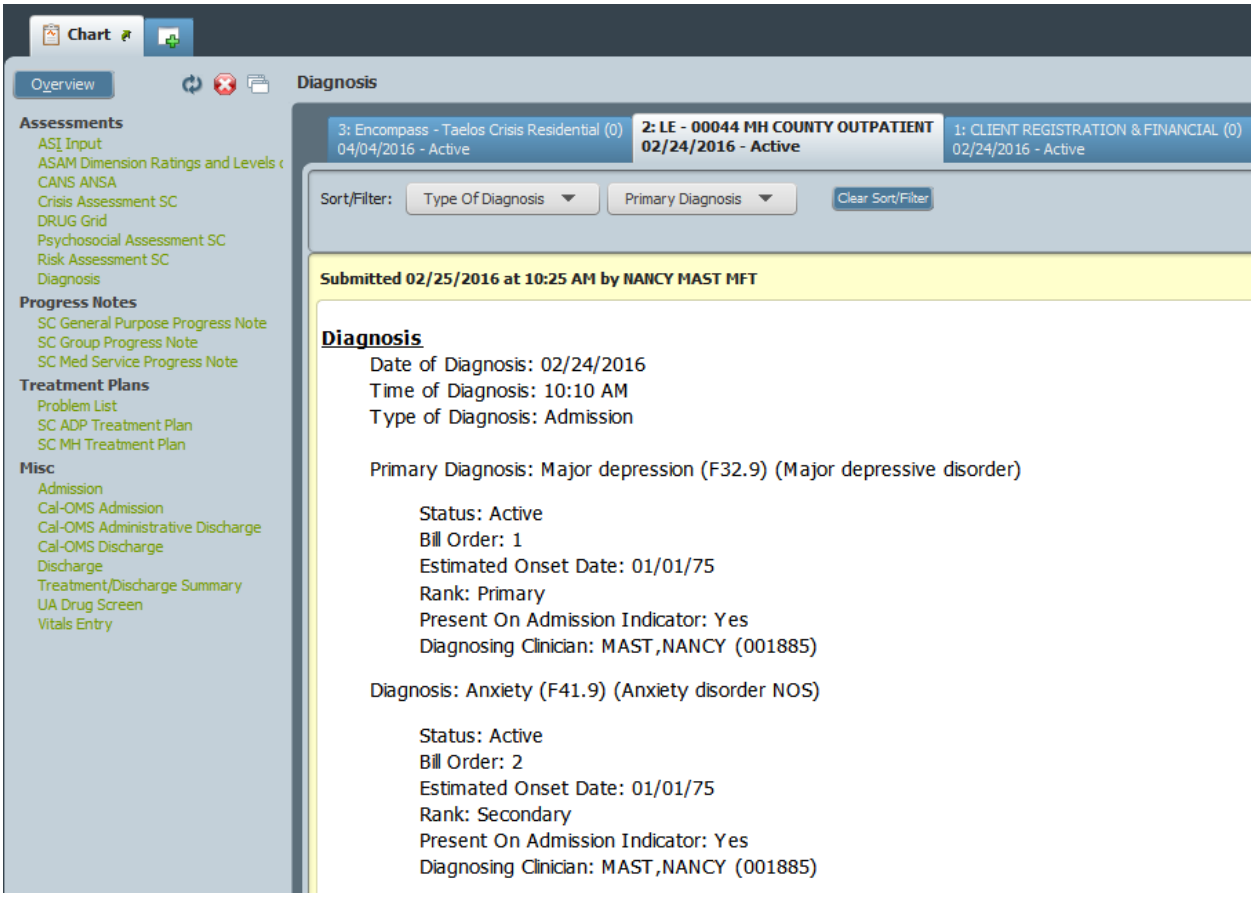



Click, "Submit" at bottom left to save your change and leave the Add/remove forms area. You will return to the chart Inquiry View. You will now see the diagnosis form on the left in the Assessments Group.



# Santa Cruz Avatar

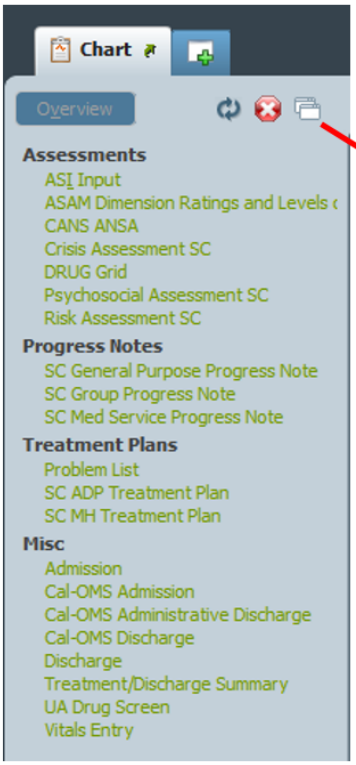
Click on “Diagnosis” to view diagnoses that have been added to the chart.



# Santa Cruz Avatar

## Add a Form That is Not Listed to Your Chart View

If you need to add a form that is not listed in your Chart View, use the following procedure.




In this example, the Diagnosis form is not in the Chart View. When you look at the forms listed on the left hand side of the chart, you cannot see the diagnosis form.

**To add a form to the chart**, first click on the "Customize Forms" symbol at upper left. This will take you to the "Add/Remove Forms" area, where you can add forms to the list at the left of the Inquiry View.

# CSI Cheat Sheet

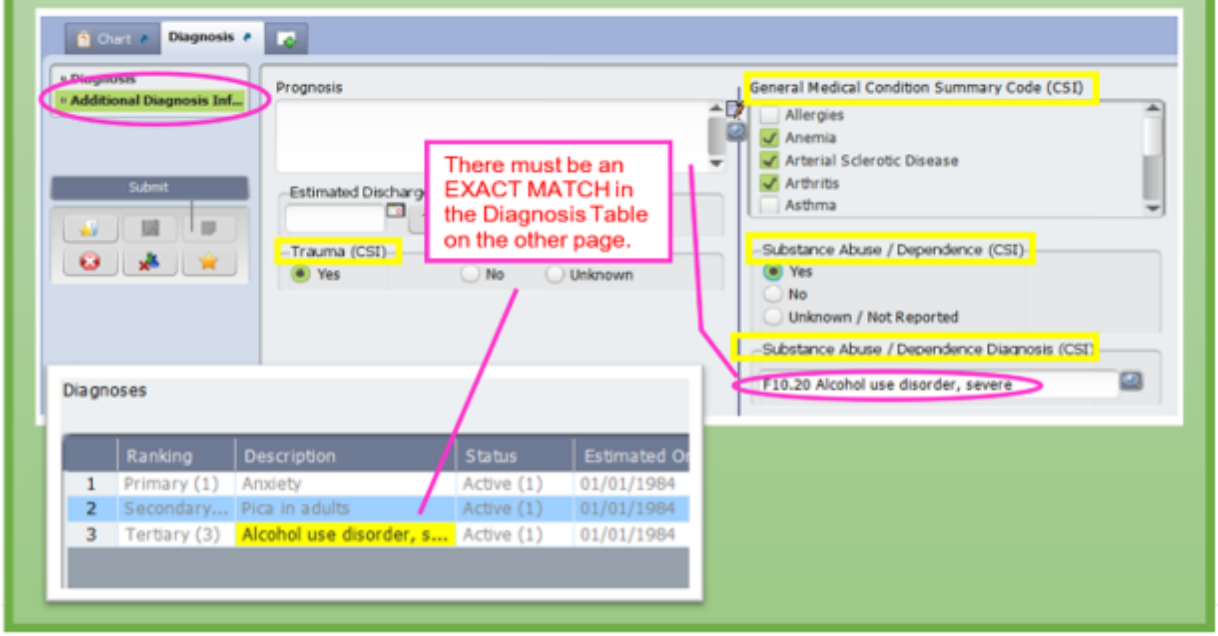
**Admission Form**: Do not confuse with the CSI Admission form, which is different. Answer all questions on the Admission Form, even those that are not red/required. If you cannot get all of the CSI Admission questions answered

**Discharge Form:** Check to make sure that the prefilled data is accurate, update any information as needed, and answer the four unique CSI questions that are in this form only: Type of Discharge, Smoking Status, Patient Status Code, Discharge Legal Class

**Add a Form That is Not Listed to Your Chart View**

If you need to add a form that is not listed in your Chart View, see the Avatar Clinicians Manual.

**Update Client Data and CSI Information (CSI Admission) Forms (Client Info and Missing CSI Widget)**

The Client Info & Missing CSI Widget contains links to forms that have CSI questions.

**Diagnosis Form:** Complete the Additional CSI Questions on the Second Tab, Additional Diagnosis Information