# Netsmart Sandbox Tour Guide Script

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This document is to be used in conjunction with the Netsmart Sandbox environment as a guide.  Following the steps included in this guide will allow you to get a sense for the general workflow for your role and how you will interact with the Netsmart solutions, once your own system build is completed.  It will provide you with a foundation for understanding the required data collection and making any design decisions associated with the project.

# Avatar PM – Admission Outpatient

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## Purpose

The workflow experience contained within this document outlines an example workflow of an outpatient admission process for a new client. You will walk through the following steps:

- **Admission (Outpatient)**

  You will admit a new client into an outpatient program.

- **Cross Episode Financial Eligibility**

  This form is used to create and maintain the Guarantor record is applied to all episodes from the selected client.

- **Diagnosis**

  You will add a diagnosis record using DSM-IV and ICD-9 codes for your new client.

- **Scheduling Calendar**

  You will add a new appointment for your client.

Please keep in mind that an Admission workflow could have many variations or additions based on the needs and workflows established within your organization. We wanted to provide you with a basic Admission process in Avatar so you could start to become familiar with the key Avatar forms and client movements within the Avatar system.

## Terminology

- **Admission (Outpatient)** – the form utilized to admit clients into an outpatient program. Using this form will create an Outpatient episode for a client in Avatar.

- **Episode** – In Avatar, a client is admitted into an episode of care. An episode starts with a new Admission (Inpatient or Outpatient) and ends with a Discharge that follows that Admission. Many client activities (services, assessments, treatment plans, progress notes) may happen within one episode.

- **Forms** – the data entry screens in Avatar that are used to track medical record information.

- **Home View** – a user's main navigation screen. The Home View allows a user to view their caseload, search for clients, access forms, or navigate to the client Chart View.

- **Chart View** – a view for quick access to the client's stored medical record information. The Chart View is comprised of three main sections:

  o **The Chart Widget View** – like the Home View, displays windows of information pertinent to the client and their overall status.

  o **The Chart Overview** – located on the left side of the Chart View, the Chart Overview provides links to forms in Avatar pertinent to the user's workflow. This allows the user to quickly navigate to stored data and forms they use in their job on a daily basis for an individual client.

  o **The Chart Inquiry View** – works in conjunction with the form links in the Chart Overview. When a form link is clicked by a user, the Chart Inquiry view becomes available to the user and they are able to see any stored data on file for the client for that specific form. From the Chart Inquiry View, a user can easily edit an existing record or add a new record.

- **Clinicians/Practitioners/Staff** – Persons that render services or treat clients directly.

- **Cross Episode Financial Eligibility** – the form used to track a prioritized list of guarantors for liability distribution for the selected client across all of the client's episodes of care.

- **Diagnosis** – the form used to track and update a client's diagnosis record using DSM-IV and ICD-9 codes. The Primary Diagnosis established in this form is utilized as the primary billing diagnosis on claims.

- **Scheduling Calendar** – Avatar functionality that provides the user the ability to manage appointments at multiple sites for staff members, clients and groups.

- **Widgets** – windows of information that display information about key Avatar functionality, a client, a program, or your organization.

# Netsmart Sandbox Tour Guide

## Logging into Avatar

1. Launch Avatar from the provided URL address.: https://sandbox.asp.ntst.com/plexus/pm

2. Click the **Start** button to launch the application.
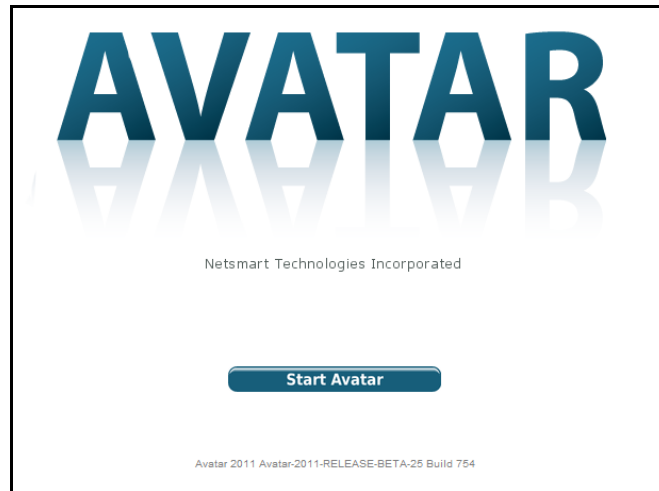


3. Log in by selecting the **Server** you are going to log in.

4. Type "SAMPLE" in the **System Code** field.

5. Type in a clinical **Username**: INTAKE1, INTAKE2, INTAKE3, INTAKE4, or INTAKE5.

6. Type in the **Password** for the CLINICIAN username (they all use the same): INTAKE99.

7. Click the **Sign In** button.



**Section Recap:**

You have now logged into Avatar.

## Admission (Outpatient)

The Admission form is utilized in Avatar to admit clients into an outpatient program or episode of outpatient care.

1.  On the Home View, locate the **Forms and Data** widget.
2.  In the Forms and Data widget, type "Admission" in the **Search Forms** field. Double click **Admission (Outpatient).**
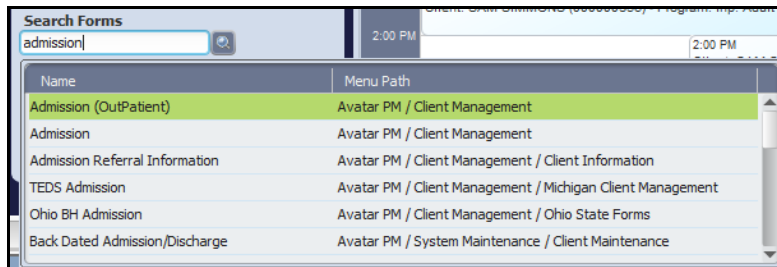


3.  The Select Client window will appear.
    *Note: Avatar requires that you search for the client you want to complete the admission record for. This ensures that the patient is not already entered into the system to avoid duplicate entries.*
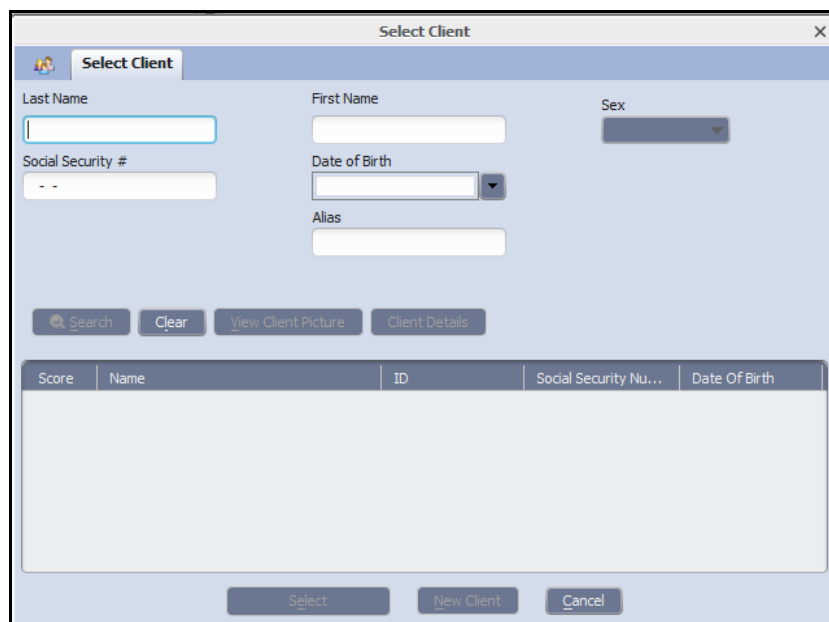


4.  Enter a last name and a first name for a client you want to admit into an episode of care in Avatar.
5.  Click the **Sex** scroll-down list.
6.  Select a sex for your client.
    *Note: You must have three fields completed before search button becomes enabled.*
7.  Click **Search**.

8. Click **New Client**.

9. A message will appear asking if you want to auto assing the next ID number. Click **Yes**.

10. If you click **No**, you will need to manually assign a numeric identifier to the client.
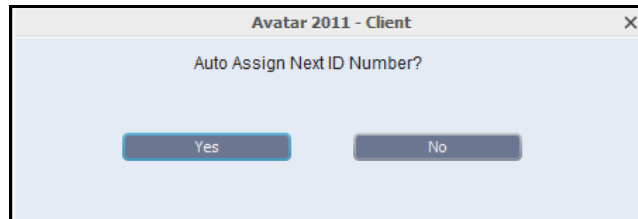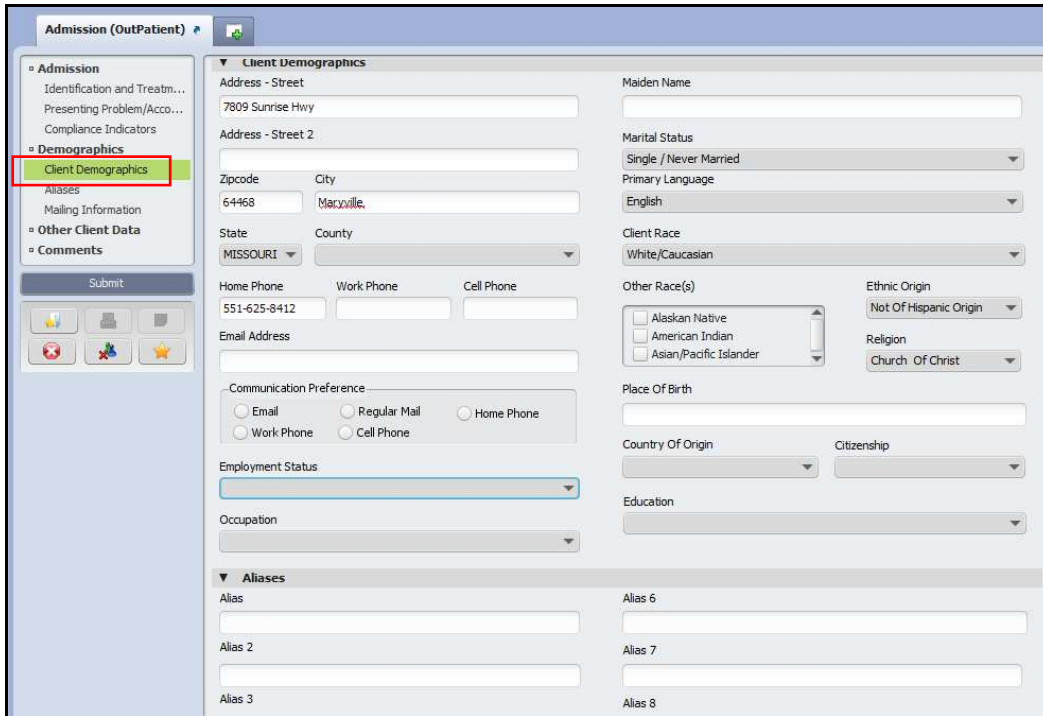


11. Write down your client's assigned Avatar ID number & last name:

_____

12. The Admission form will open.
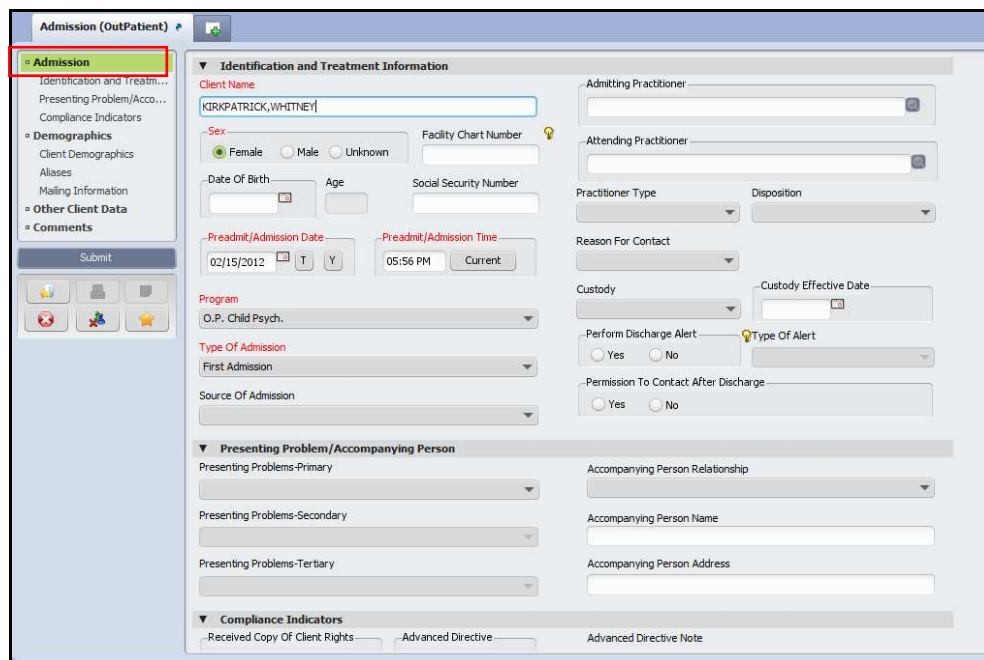


13. Enter the first day of the previous month in the **Preadmit/Admission Date** field.

14. Client **Current** in the Preadmit Admission Time.

15. Click **Program** drop-down list.

16. Select one of the following programs:

**O.P. Child Psych**

**O.P. Mature Adult Psych**

**O.P. Adult S.A.**

17. Click the **Type of Admission** drop-down list.

18. Select **First Admission**.

19. Click on the **Demographics** section in the form tree on the left side of the screen.



20. Enter an address for your client. You may use 111 Center Rd Ann Arbor MI 48105
21. Click **Submit** to complete the form and save your client's admission.

**Section Recap:**

You have now created a new client and placed the client into an outpatient episode in Avatar. Remember your client's name Avatar ID number as you will use it throughout the entire exercise.

Your client now has the following information saved in Avatar:

&#10003; Admission Record

# Cross Episode Financial Eligibility

The Cross Episode Financial Eligibility form is utilized to create and maintain the Guarantors or Payors that will be liable for covering the client's rendered services across all the client's episodes of care.
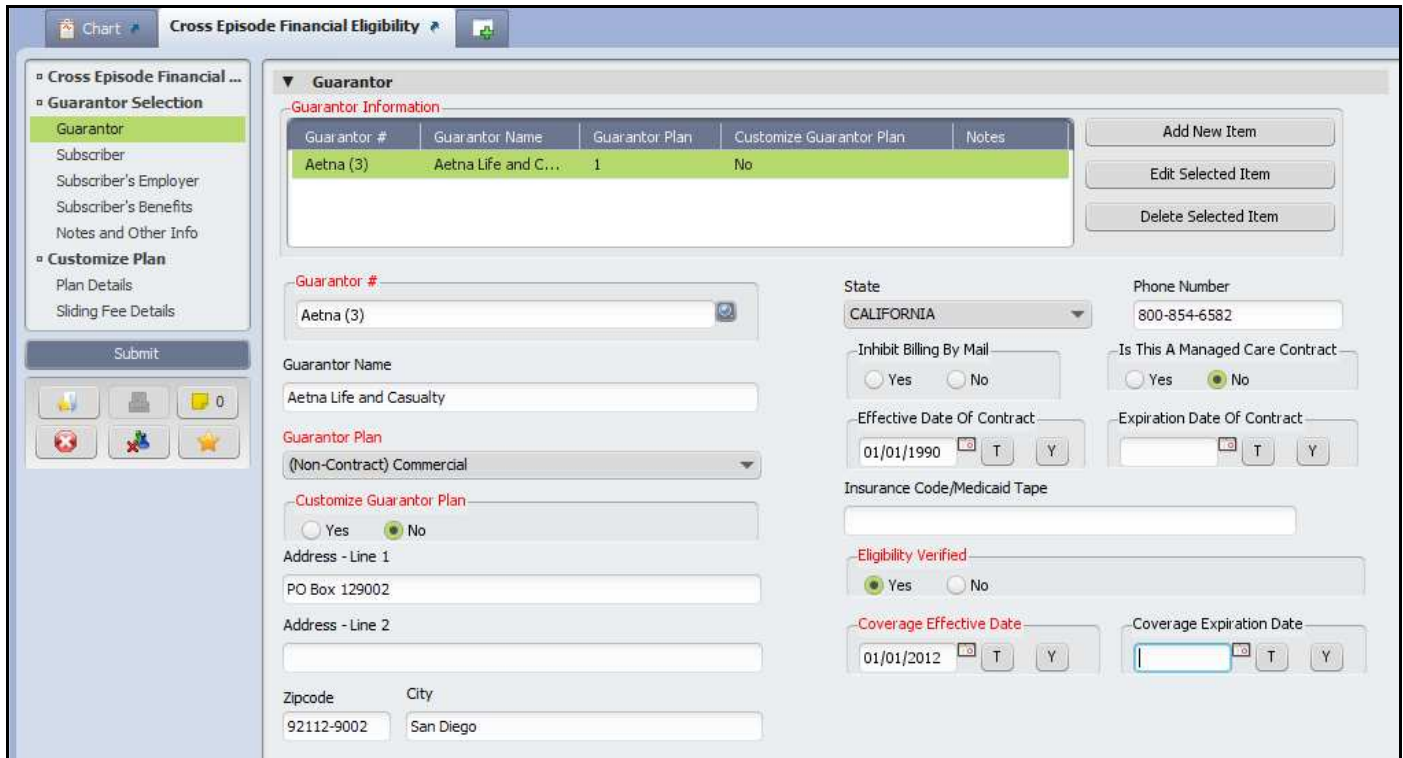
1. Select your client by clicking the name in the **My Clients** widget to highlight it.
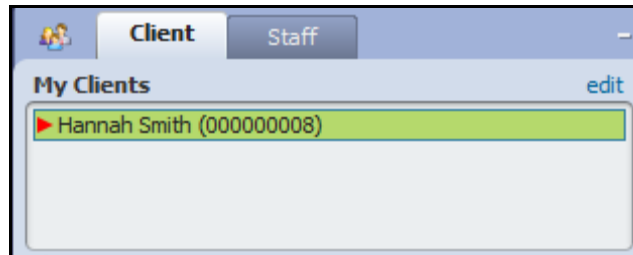


2. In the Forms and Data widget, type "Cross Episode" in the **Search Forms** field. Select **Cross Episode Financial Eligibility**.
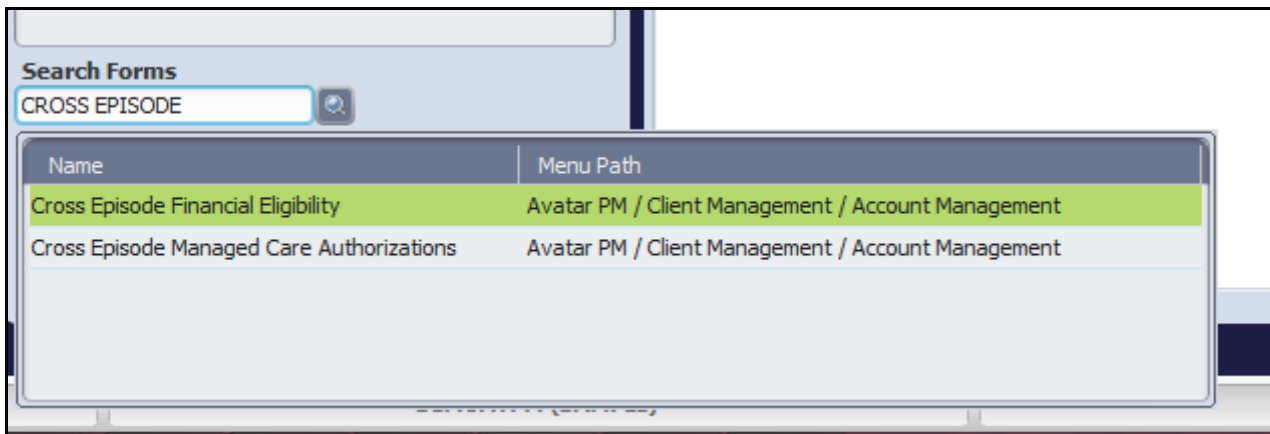


3. The Cross Episode Financial Eligibility form will open.

4.  Click the **Guarantor Selection** section in the form tree on the left side of the form.

5.  Type "3" in the **Guarantor #** field.

6.  Click **Aetna (3)**.

    *Note: Fields will automatically populate.*

7.  Click the **No** radio button from the Customize Guarantor Plan field.

8.  Click the **Yes** radio button from the Eligibility Verified field.

9.  Enter the first day of the previous month in the **Coverage Effective Date** field.

    *Note: The Coverage Effective Date must be before or on the date of Admission.*

10. Scroll down the form to view the Subscriber sub-section.

11. Click the **Client's Relationship To Subscriber** drop-down list.

12. Select **Self**.

    *Note: Required fields will automatically populate. If a field does not auto-populate for the Subscriber, fill in the Required sections (in red coloring, such as Social Security Number or Address Information).*

13. Scroll down the form to view the Subscriber's Employer sub-section.



14. Type "12345678" in the **Subscriber Policy #** field.

15. Scroll down the form to view the Subscriber's Benefits sub-section.
16. Click the **Yes** radio button from the Subscriber Assignment of Benefits field.
17. Click the **No** radio button from the Subscriber Release of Info field.
18. Click the **Yes** radio button from the Coordination of Benefits field.



19. Click the **Cross Episode Financial Eligibility** section from the form tree on the left side of the form.
20. Click the **Guarantor #1** drop-down list.
21. Select **(3) Aetna Life and Casualty**.
22. Click **Submit** to complete the form.

**Section Recap:**

You have now created a Guarantor and maintained that the Guarantor record is applied to all episodes for your client.
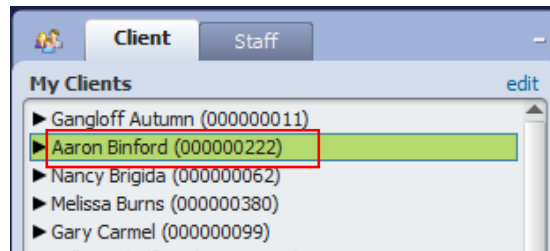
Your client now has the following information saved in Avatar:

- ✓ Admission Record
- ✓ Cross Episode Financial Eligibility

## Diagnosis

The Diagnosis form is utilized to track the client's diagnosis information in Avatar.

1. On the Home View, locate the **Client and Staff** widget. Double click the name of your client under **My Clients** to launch the client's chart view.



2. The client's chart overview will open. Here you can view the client's problems, vital signs, and episodes. It also displays the user's To-Do's for that client.

3. On the left side of the chart is the Chart Overview. The Chart Overview contains links to frequently used forms for a user's workflow.
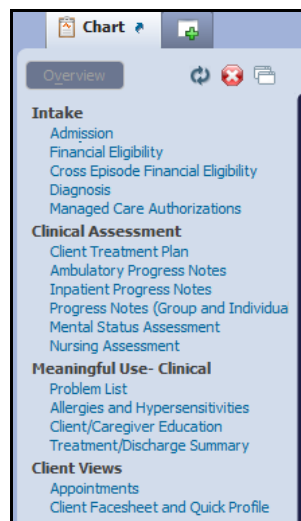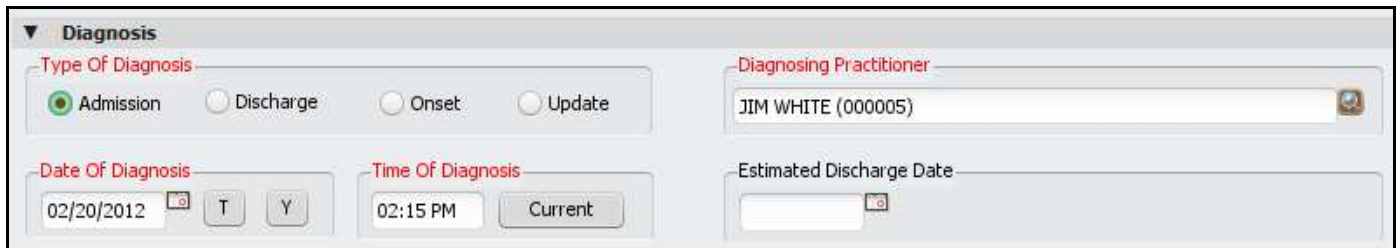


4. Click **Diagnosis** link in the Chart Overview on the left side of the chart screen. Clicking on the link opens the Chart Inquiry View.

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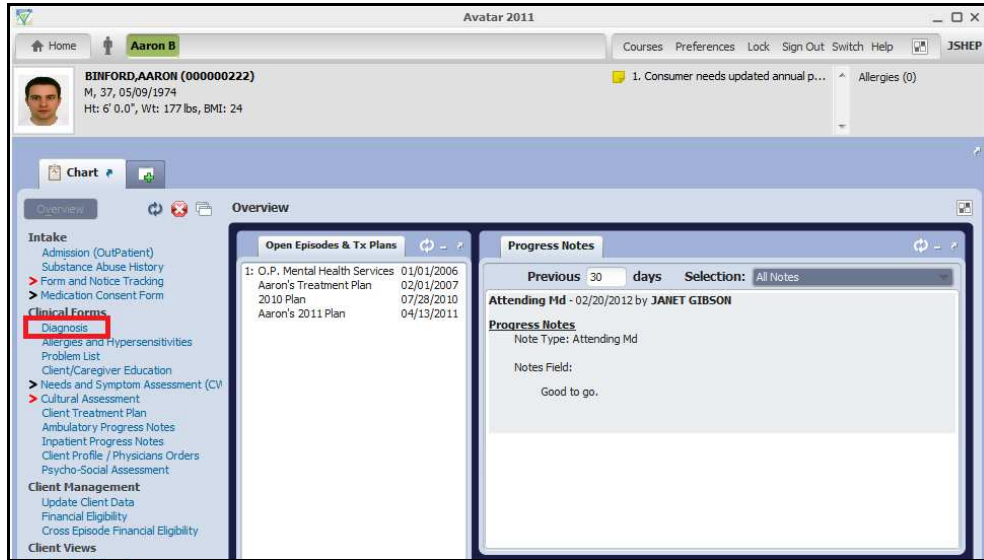


5. To launch the **Diagnosis** form, click the **Add** link.



6. The Diagnosis form will now open. The "Diagnosis" section is first.



7. Select the **Admission** radio button in the "Type of Diagnosis" field.

8. Click the **T** button (for today) in the "Date of Diagnosis" field.

9. Click the **Current** button in the "Time of Diagnosis" field.

10. Select the Diagnosing Practitioner (in this example, Jim White.)
11. Type "312.8 (INVALID 1-1-97) CONDUCT DISORDER" in the **Diagnosis – Axis I – 1** field.
12. Select **312.8 (INVALID 1-1-97) CONDUCT DISORDER**



13. Click the **Principal Diagnosis** drop-down list. The principal diagnosis is the main diagnosis that is used in the claims process.
14. Select (**312.8) (INVALID 1-1-97) CONDUCT DISORDER.**



15. Click **Submit** on the form tree on the left side of the screen to complete the form.
16.
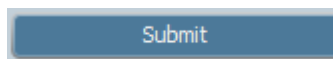


**Section Recap:**

You have now established a diagnosis for your client and attached it to their episode.
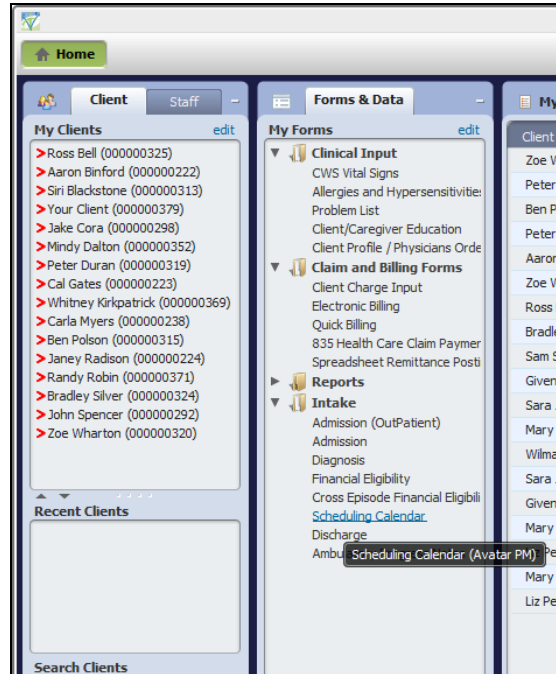
Your client now has the following information saved in Avatar:

✓   Admission Record

✓   Diagnosis

## Scheduling Calendar

Scheduling Calendar gives the user the ability to manage appointments at multiple sites for staff members, clients, and groups. In the Scheduling Calendar, you can create appointments, check clients in and out for their appointments, and set up individual appointments or group appointments. You can also assign multiple practitioners to an appointment.

1. Click on **Scheduling Calendar** under My Forms, in the Forms & Data widget on the Home View.



2. The Scheduling calendar will open.

**Section Recap:**

You have now navigated to the scheduling calendar. In the next exercise, you will schedule an appointment for your client.

Your client now has the following information saved in Avatar:

✓ Admission Record

✓ Diagnosis

## Scheduling an Individual Appointment

Using the Scheduling Calendar and the Appointment Scheduling form, you will now schedule an appointment for your client.
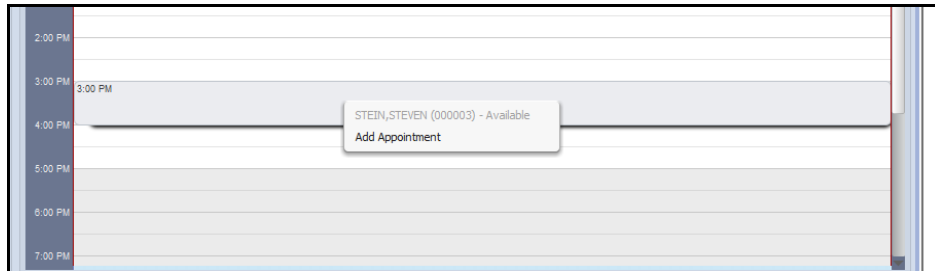
1. You are going to add a new appointment on today's date for clinician Steven Stein. Select Steven's name in the Clinician list on the left side of the Scheduling Calendar.
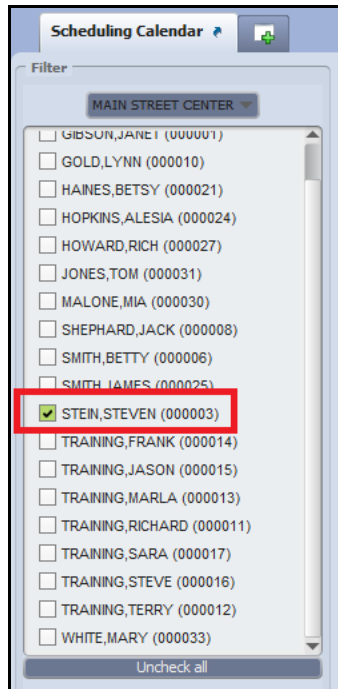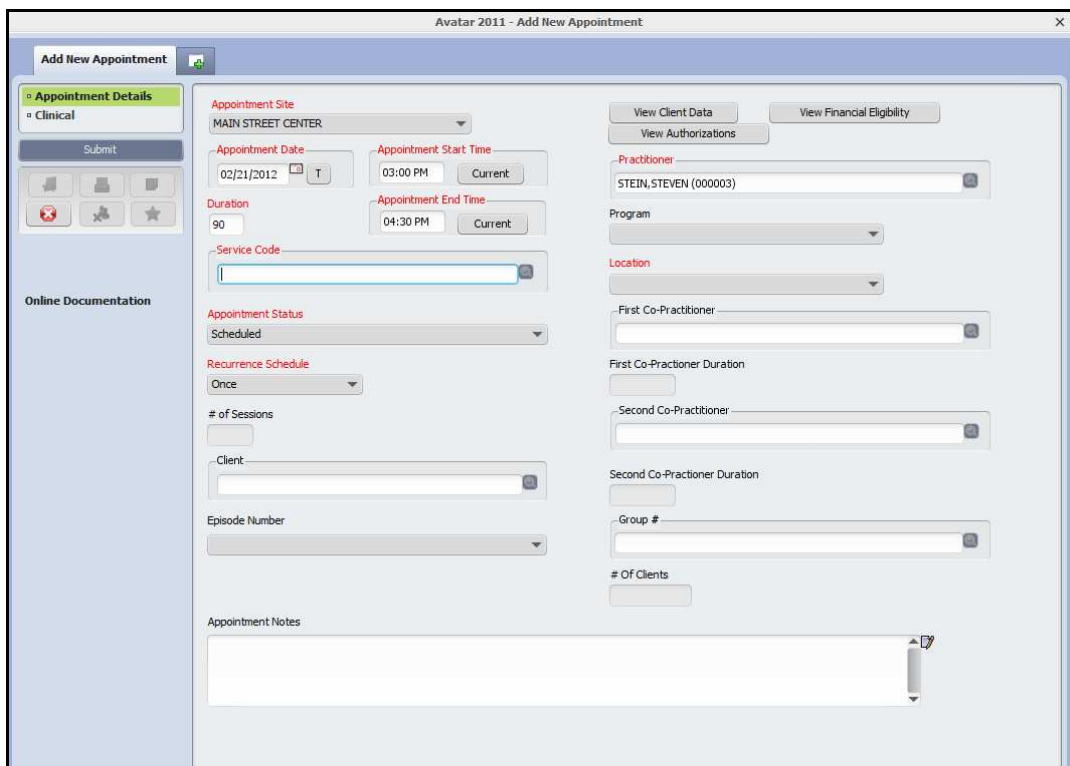


2. Click on the calendar at the desired appointment time.
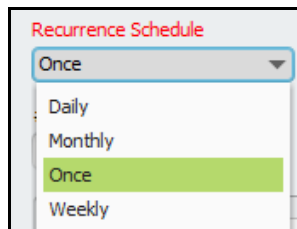3. Drag the mouse to the desired end time. A gray box will appear.
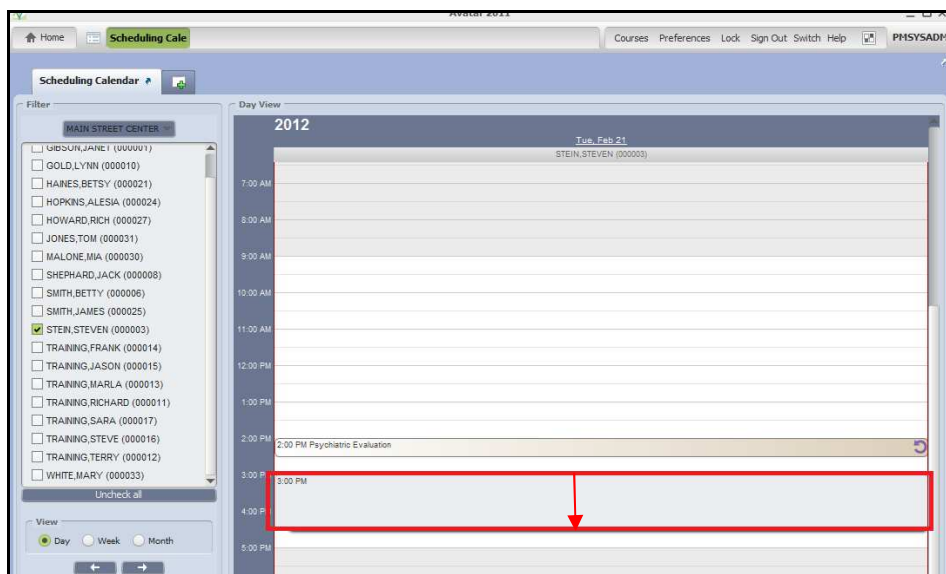
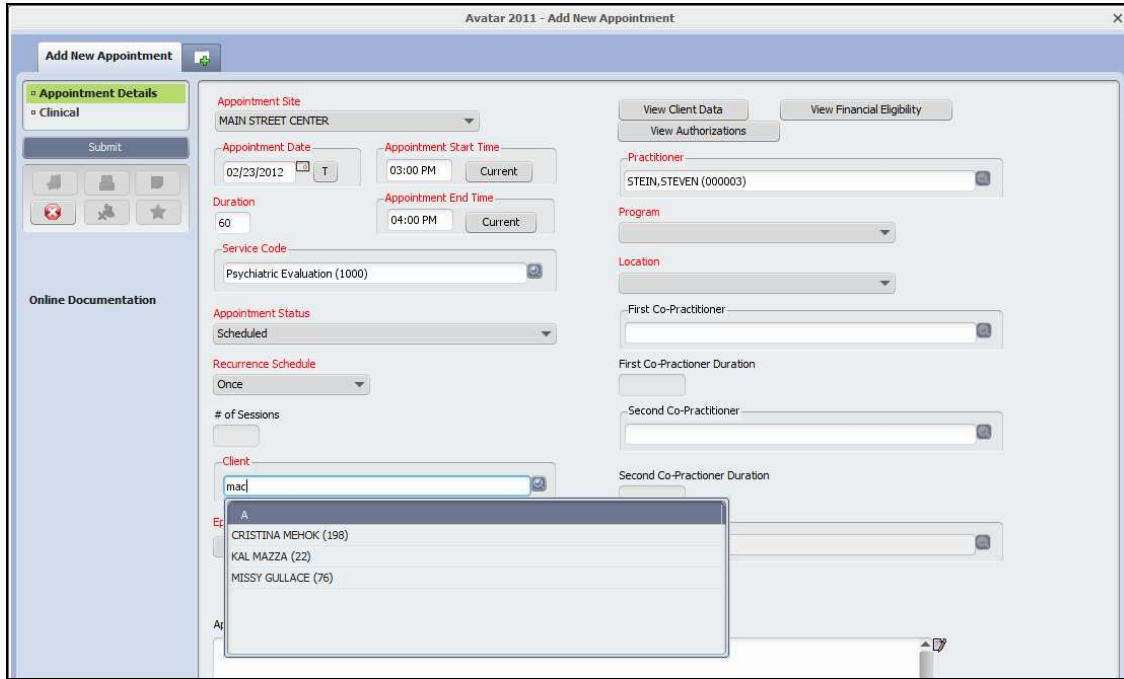4. Right Click on the appointment and select **Add Appointment.**
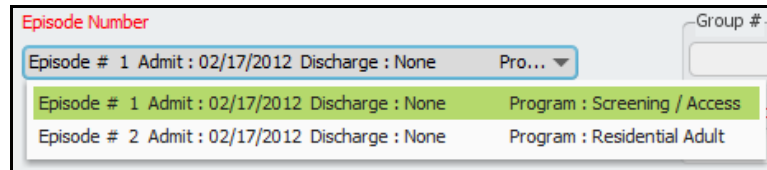


5. The Add New Appointment form will open.



6. Type "**1000**" in the service code field.
7. Click the **Recurrence Schedule** drop-down menu.
8. Select **Once.**



9. Type **your client's** last name in the **Client** search field.

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10. Click the **Episode Number** drop-down menu.
11. Select Episode 1.



12. All other required fields will be automatically populated.
13. Click the **Submit** button on the left side of the screen to save your appointment information.

**Section Recap:**

You have now admitted a new client into the system and scheduled an appointment for them.

Your client now has the following information saved in Avatar:

✓ Admission Record

✓ Diagnosis

✓ Scheduled Appointment

## *SANDBOX NOTES*