



INTERIM INSTRUCTION NOTICE #21-002

November 09, 2021

SUBJECT: myAvatar Chart Documentation Procedural Changes

DISTRIBUTION: All Department
of Behavioral Health
Staff

OBSOLETE: Upon completion of
related manual, policy
and/or procedure

Effective Date November 09, 2021

From Department of Behavioral Health (DBH) Quality Management (QM)

Introduction The purpose of this Interim Instruction Notice (IIN) is to inform San Bernardino County (County) DBH staff of myAvatar procedural changes related to chart documentation. These changes apply to both Specialty Mental Health Services (SMHS) and Substance Use Disorder and Recovery Services (SUDRS) staff and are effective immediately. This IIN supersedes any written or verbal instructions previously issued by DBH until the requirements are updated in the applicable DBH manual(s).

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Interim Instruction Notice 21-002, Continued

Chart Documentation – Mental Health Clinics

The following outlines the updated requirements for chart documentation in myAvatar (or Care POV, if applicable) for all rendering mental health providers in clinic settings:

| Step | Action |
|------|--|
| 1 | Rendering provider shall enter chart documentation into myAvatar (or Care POV, if applicable) the same day as the service was provided. |
| 2 | Rendering provider will ensure chart documentation is completed or routed, if applicable, to their designated Supervisor/designee no later than the rendering provider's next business day of work after the service is provided. |
| 3 | Supervisor/designee shall review the rendering provider's progress note(s) within seven (7) business days of submission. |
| 4 | Supervisor/designee will either approve the progress note or reject the note if errors are identified during review. Note: Rejected progress notes, proceed to Steps 5 - 7 . Approved progress notes, proceed to Step 8 . |
| 5 | When a progress note is rejected by the Supervisor/designee due to identified errors, the Supervisor/designee shall include comments on the progress note and reject the progress note in myAvatar. This will return the note to the provider for correction. |
| 6 | Rendering provider will review comments, complete all necessary revisions and re-submit to Supervisor/designee for final approval within three (3) business days of supervisor's return for correction. |
| 7 | Supervisor/designee will review the revised progress note within three (3) business days of re-submission. Note: If errors remain or new errors are identified upon resubmission, Steps 5 – 7 will repeat until the progress note is free of errors and approved. |
| 8 | Approved progress notes will appear as Final in the client's chart in myAvatar. |

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Interim Instruction Notice 21-002, Continued

Chart Documentation – SUDRS

The following outlines the updated requirements for chart documentation in myAvatar (or Care POV, if applicable) for all rendering SUDRS providers:

| Step | Action |
|------|--|
| 1 | Rendering provider shall enter, complete and route to their Supervisor/designee (if applicable) chart documentation into myAvatar (or Care POV, if applicable) no later than three (3) calendar days after the service is provided. |
| 2 | Supervisor/designee shall review the rendering provider's progress note(s) within one (1) calendar day of submission. |
| 3 | Supervisor/designee will either approve the progress note or reject the note if errors are identified in the note during review. Note: Rejected progress notes, proceed to Steps 4 - 6 . Approved progress notes, proceed to Step 7 . |
| 4 | When a progress note is rejected by the Supervisor/designee due to identified errors, the Supervisor/designee shall include comments on the progress note and reject the progress note in myAvatar. This will return the note to the provider for correction. |
| 5 | Rendering provider will review comments, complete all necessary revisions and re-submit to Supervisor/designee for final approval within one (1) calendar day of supervisor's return for correction. |
| 6 | Supervisor/designee will review the revised progress note within one (1) calendar day of re-submission. Note: If errors remain or new errors are identified upon resubmission, Steps 5 – 7 will repeat until the progress note is free of errors/approved. |
| 7 | Approved progress notes will appear as Final in the client's chart in myAvatar within seven (7) calendar days of the counseling session in order to meet the contractual requirements with the Department of Health Care Services (DHCS). |

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Chart Documentation – Field-Based and Emergency Services

The following outlines the updated requirements for chart documentation in myAvatar (or Care POV, if applicable) for all rendering mental health providers in field-based and emergency service settings:

| Step | Action |
|------|--|
| 1 | Rendering provider shall enter chart documentation into myAvatar (or Care POV, if applicable) the next business day as the service was provided. |
| 2 | Rendering provider will ensure chart documentation is completed or routed, if applicable, to their designated Supervisor/designee no later than the rendering provider's one business day of work after the service is documented. |
| 3 | Supervisor/designee shall review the rendering provider's progress note(s) within seven (7) business days of submission. |
| 4 | Supervisor/designee will either approve the progress note or reject the note if errors are identified during review. Note: Rejected progress notes, proceed to Steps 5 - 7 . Approved progress notes, proceed to Step 8 . |
| 5 | When a progress note is rejected by the Supervisor/designee due to identified errors, the Supervisor/designee shall include comments on the progress note and reject the progress note in myAvatar. This will return the note to the provider for correction. |
| 6 | Rendering provider will review comments, complete all necessary revisions and re-submit to Supervisor/designee for final approval within three (3) business days of supervisor's return for correction. |
| 7 | Supervisor/designee will review the revised progress note within three (3) business days of re-submission. Note: If errors remain or new errors are identified upon resubmission, Steps 5 – 7 will repeat until the progress note is free of errors and approved. |
| 8 | Approved progress notes will appear as Final in the client's chart in myAvatar. |

Questions

For questions regarding this Interim Instruction Notice, please contact DBH Quality Management at 909-386-8227 or via email at QualityManagementDivision@dbh.sbcounty.gov.