



Division of Public and Behavioral Health Policy

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			Delete/Re-Assign To Do Items	2016-03-15	1 of 3

1.0 Policy

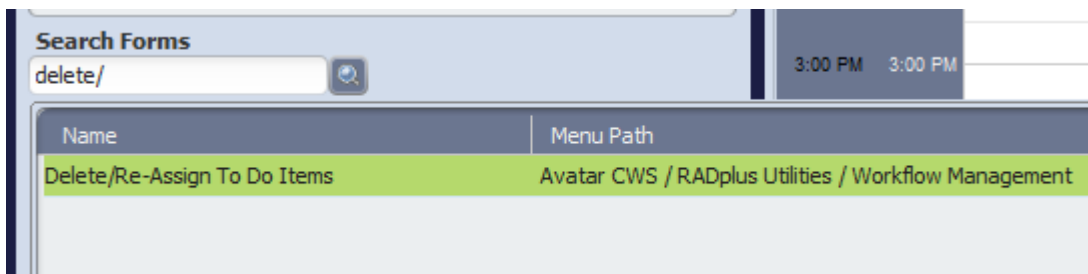
It is the Policy of the Division of Public and Behavioral Health (DPBH), Substance Abuse, Prevention, and Treatment Agency (SAPTA) that all providers, in accordance with 505 (a) of the Public Health Service Act (42 US code 290aa-4) which directs the Administrator of the Substance Abuse and Mental Health Services Administration (SAMHSA), to collect items including admission and discharge data.

- When to-dos are listed in a Practitioner's to-do list that have already been completed, or were entered in error, and need to be deleted from the to-do list, this following procedure will be used.
- If to-do items need to be re-assigned to a different staff member, the following procedure will be used.

Only designated Superusers have the ability to use this function. Contact the Avatar Training and Support Team if further assistance is needed.

2.0 Procedure

1. Before to-do items are deleted, you must check the following:
 - Navigate to the Client's Chart View to ensure the progress note did not post for the specific item.
 - Navigate to the Client's Chart View to ensure a service has not posted for that item in the **Service History** widget. (If this widget is not present, use the **Client Ledger** to ensure the service has not posted.
 - If the progress note and the service are not displayed, you are okay to proceed.
 - **IF EITHER OF THE ABOVE IS POSTED, THIS PROCEDURE IS NOT APPLICABLE. DO NOT CONTINUE.**
2. From the **HOME** screen, in the **Search Forms** field, type in **delete/re-assign to do items**.



3. Double-click the highlighted selection. The form will display.



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Delete/Re-Assign

Delete Re-Assign

Select User:

Select Target User:

To-Dos

Change Sending User ID To:

Comment:

DELETING TO-DOS

- To delete items, choose the **Delete** radio button.
- Choose the **Select User** by searching for the staff member by last name.
- Once the user is selected, a list of open to-dos will display in the box.
- Click the one that needs to be deleted.
 - Ensure you check the **date of service, client name or ID, note date, and the group name (if applicable)**.

Delete/Re-Assign

Delete Re-Assign

Select User:

Select Target User:

To-Dos

✓ 2016-03-15 Tuesday 09:00 AM Progress Notes (Group and Individual) STEPHANIE ROBBINS (000000001) Group Note Date: 03/15/2016 Episode: 1 Type: Group

- Enter a comment on why the to-do is being deleted, with your initials at the end.
 - EX: Per practitioner, this note was entered in error. SR
 - EX: Per practitioner, this to-do was previously completed. SR

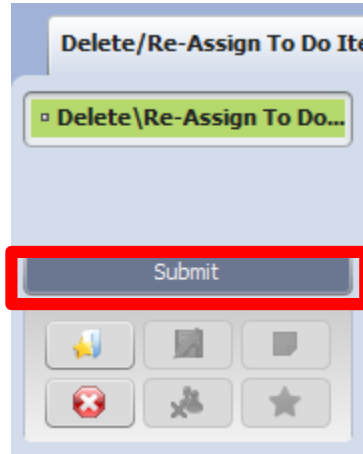
Comment:

- Click **Submit** on the left hand side when completed. This will delete the to-do item from the practitioner's list.



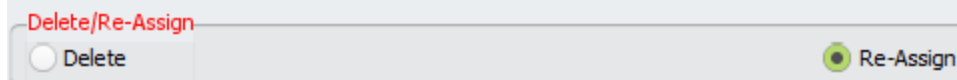
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RE-ASSIGNING TO-DOs

10. When a to-do item needs to be re-assigned to a different practitioner, click **Re-Assign**.

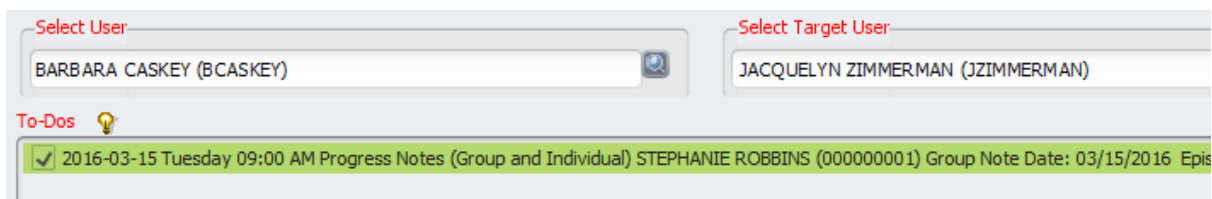


11. Choose the original user in the **Select User** field, searching by last name.

12. Select the **Target User** in the field to the right, searching by last name.

13. Choose the specific to-do to re-assign by clicking on the check box next to the correct to-do.

a. Ensure you check the **date of service, client name or ID, note date, and the group name (if applicable)**.



14. Click **Submit** on the left hand side to make the changes.

