



## Division of Public and Behavioral Health Policy

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### 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.

### 2.0 Procedure

Daily bed rates in Avatar are posted by completing the following forms, in the exact order:

1. **Verify Unit Census**
2. **Compile Residential/Inpatient Charges**
3. **Edit Residential/Inpatient Worklist** (if needed)
4. **Post Residential/Inpatient Charges**
5. **Unit Verification Report**

This process can be done daily, weekly, monthly depending on the facility's preference.

#### Verify Unit Census

1. From the Avatar Home Screen, search for the **Verify Unit Census** form.

The screenshot shows a search interface with a search bar containing 'verify unit'. Below the search bar is a table with two columns: 'Name' and 'Menu Path'. The table contains one entry: 'Verify Unit Census' with the menu path 'Avatar PM / Services / Inpatient/Residential'.

Name	Menu Path
Verify Unit Census	Avatar PM / Services / Inpatient/Residential

2. Choose the **Unit** based on the specific facility.
  - a. All units can be verified at the same time, if applicable.
3. Choose **Yes** that all units were verified.
  - a. This is confirming that you've confirmed all client beds for the timeframe listed next.
4. Enter the **Date Verified From**.
  - a. This field should auto-populate with the date the last time this report was populated. Most likely this is the date to be used. Or you can enter:
    - b. **T** for today
    - c. **Y** for yesterday
    - d. or enter date in the field provided.



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5. Enter the **Date Verified Through**.

- This will be the end date of the period of which you're verifying the bed rates. (i.e. daily, weekly, monthly)

Unit

Quest House

Census Verified (Y/N)

Yes  No

Date Verified From

08/20/2015 T Y

Date Verified Through

08/27/2015 T Y

6. Click **Submit** on the left hand side when completed.

Verify Unit Census

Verify Unit Census

Submit

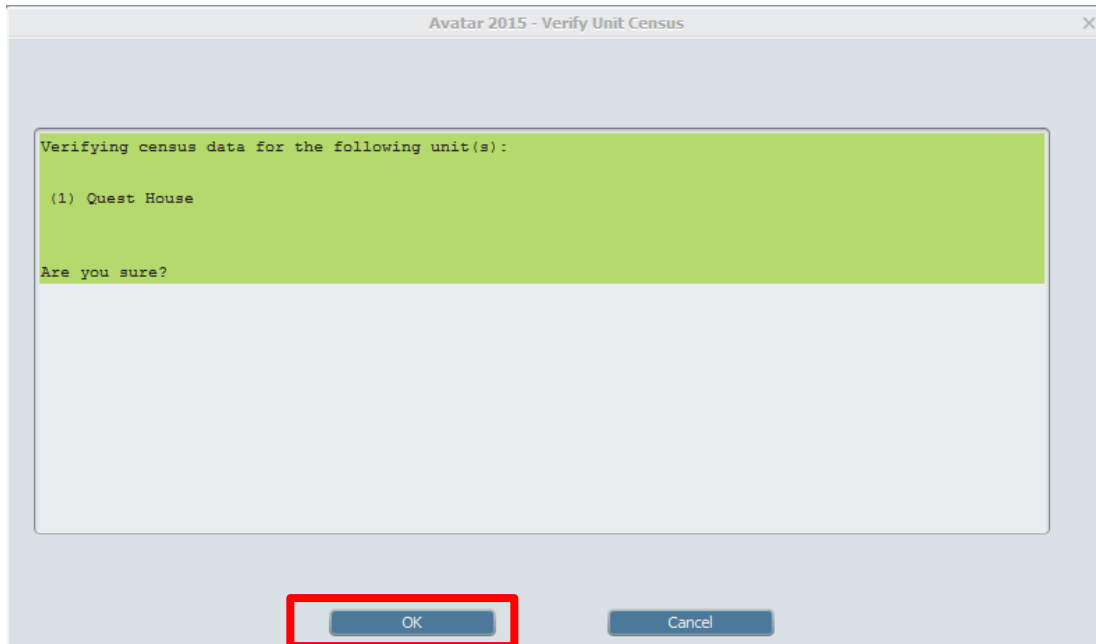
7. Avatar will prompt you with the following screen to ensure the correct unit was chosen.

- Click **ok**.



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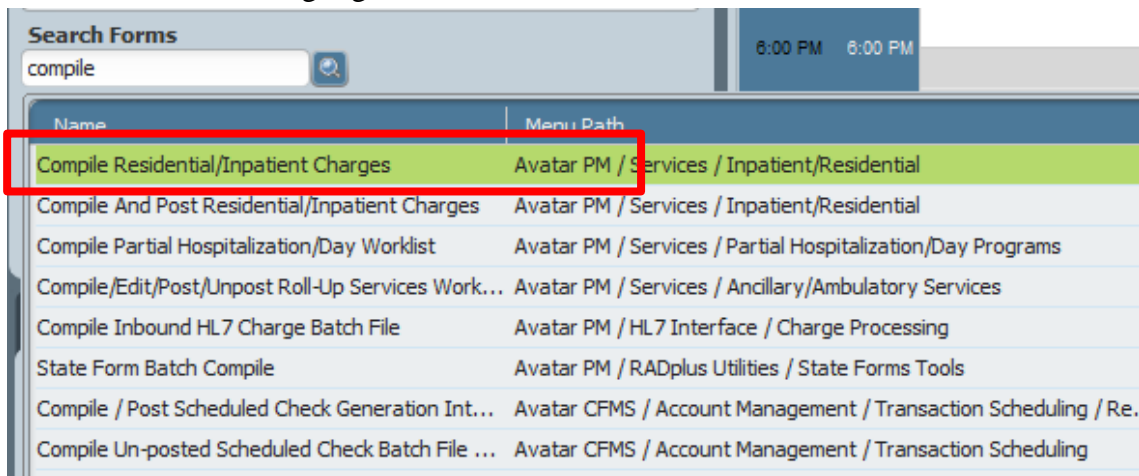
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- The next step is to compile the residential/inpatient charges.

### Compile Residential/Inpatient Charges

- From the Avatar Home Screen, search for **Compile Residential/Inpatient Charges** in the **Search Forms** widget.
  - Double-click the highlighted selection.



- Click to compile for **All** units.



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Individual Or All Units

All  Individual

Select Unit(s)

Quest House

11. Choose the **Compile Charges From Date**.

- a. This date must match the date selected in the **Verify Unit Census** form (step 4 listed above).

12. Choose the **Compile Charges Through Date**.

- a. This date must match the date selected in the **Verify Unit Census** form (step 5 listed above).

Compile Charges From Date

08/20/2015  T Y

Compile Charges Through Date

08/27/2015  T Y

13. The last field is **Do You Wish To Recreate The Residential/Inpatient Worklist**.

- a. Select **Yes** the first time the worklist is compiled, or to recreate the worklist on the current unit census. **This will most likely always be the correct choice.**
- b. Select **No** if edits were made to the worklist and those edits are to be included.

Do You Wish To Recreate The Residential/Inpatient Worklist

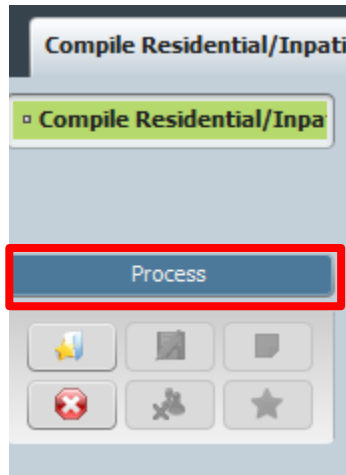
Yes  No

14. Click **Process** on the left hand side.



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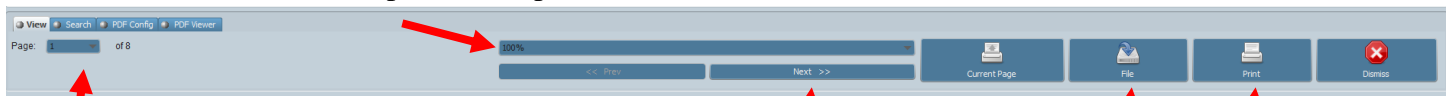
15. A report will process and display on the screen. The report will list all clients, room and board code, and room and board charge for the dates specified in steps 11 and 12 above.

RUN DATE : 09/21/2015 03:37 PM PAGE : 1  
 Quest Counseling and Consulting Inc  
 3500 Lakeside Court, Suite 101  
 Reno , NV 89509-4843

**ROOM AND BOARD BILLING WORKLIST**  
 FOR 08/20/2015  
 UNIT Quest House

ID #	EP #	CLIENT NAME	R&B / DC CODE/CHARGE	ADMISSION CODE/CHARGE
42	3	BLOW, JOSEPH	101	40.00
23	1	BOB, JOE	101	40.00
17	1	CAR, MIRE	101	40.00
45	3	CATMAN, BILL	101	40.00
46	3	CLAUS, SANTA	101	40.00
19	1	CLEAVER, BEAVER	101	40.00
14	1	DEERE, JOHN	101	40.00
11	1	FUNNY, DOUG	101	40.00
13	1	KIL, JOE	101	40.00
16	1	MOUSE, MICKEY	101	40.00
22	1	RAPNICH, MARTIN	101	40.00
10000000	1	SMITH, SALLY	101	40.00
18	1	WERFLEMONSTER, JEDIDIAH	101	40.00
<b>TOTAL</b>	<b>13</b>			<b>520.00</b>

- a. Use the bottom features of the report to change the pages, zoom size, file (save), or print.
- b. Please save or print this report for future reference.



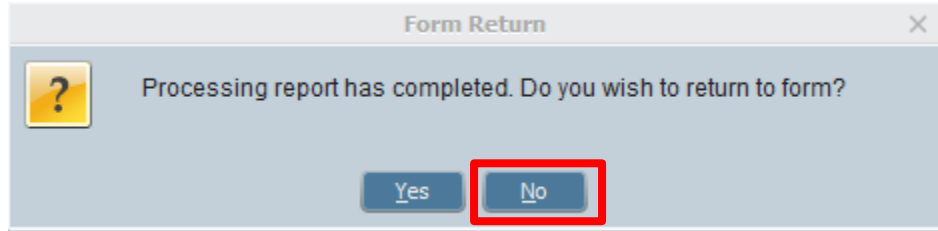
16. Exit out of the report when it's been saved or printed.



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17. The **Form Return** screen will appear. Unless you want to return to that form, click **No**.



A dialog box titled "Form Return" with a close button (X) in the top right corner. It contains a question mark icon and the text "Processing report has completed. Do you wish to return to form?". Below the text are two buttons: "Yes" and "No". The "No" button is highlighted with a red rectangular box.

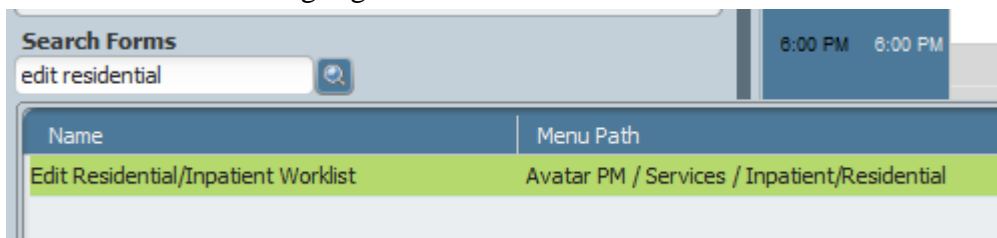
18. The next step is only used if applicable – **Edit Residential/Inpatient Worklist**. If the above report had inaccuracies (such as a double billing for the daily room and board rate), this form will be used to edit the discrepancies.

NOTE: If the data looked accurate from the above report, skip to step 28.

### Edit Residential/Inpatient Worklist

19. From the Avatar Home Screen, search for the **Edit Residential/Inpatient Worklist** form in the **Search Forms** widget.

a. Double-click the highlighted form to select.



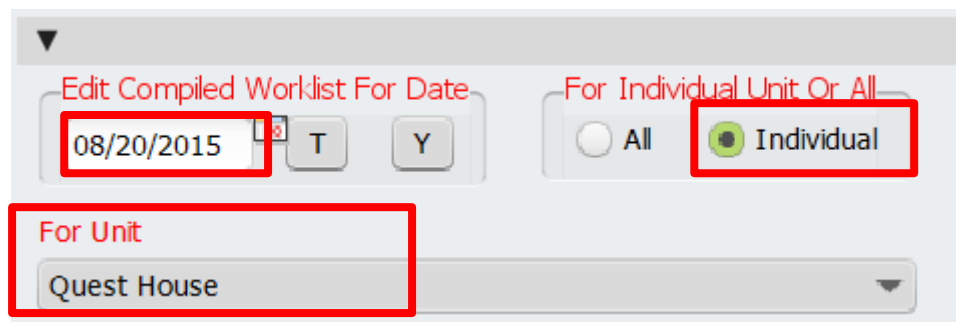
A screenshot of the "Search Forms" widget. The search bar contains the text "edit residential". Below the search bar is a table with two columns: "Name" and "Menu Path". The table has one row with the following data:

Name	Menu Path
Edit Residential/Inpatient Worklist	Avatar PM / Services / Inpatient/Residential

20. The correct date should automatically populate the **Edit Compiled Worklist for Date** field.

21. In the **For Individual Unit or All** field, choose **Individual**.

22. Select the correct unit in the **For Unit** field.



A screenshot of the "Edit Compiled Worklist for Date" form. The form has three main sections:

- Edit Compiled Worklist For Date:** A date field containing "08/20/2015" and two buttons labeled "T" and "Y".
- For Individual Unit Or All:** Two radio buttons. The "All" button is unselected, and the "Individual" button is selected and highlighted with a red rectangular box.
- For Unit:** A dropdown menu with "Quest House" selected and highlighted with a red rectangular box.



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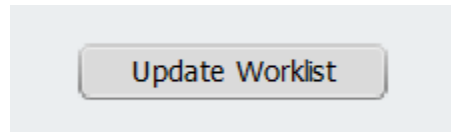
23. Select the **Client ID** for the person with the wrong code and/or charge.

24. Ensure the information is fixed to reflect the following data:

The screenshot shows a web form with the following sections:

- Edit Compiled Worklist For Date:** 08/20/2015, with 'T' and 'Y' buttons.
- For Individual Unit Or All:** Radio buttons for 'All' and 'Individual' (selected).
- Admit Charge Code:** A dropdown menu.
- Admit Charge:** A text input field.
- For Unit:** A dropdown menu showing 'Quest House'.
- Daily Charge Code:** A dropdown menu.
- Daily Charge:** A text input field.
- Client Charge Information (highlighted with a red box):**
  - Client ID:** (13) KIL,JOE
  - Room and Board Charge Code:** (101) Room + Board
  - Room and Board Charge:** 40.00
- Update Worklist:** A button on the right side.

25. When information has been updated, click **Update Worklist** on the right hand side of the form.



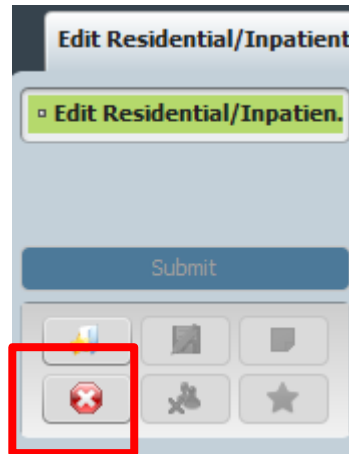
NOTE: Before moving on to Post (next step), check that your work has been saved correctly by choosing to Compile Residential/ Inpatient charges one more time but this time enter NO for “Do you wish to recreate the residential/inpatient worklist” Make sure all the extra 0 charges are gone.

26. Click the red X on the left hand side to exit this form.



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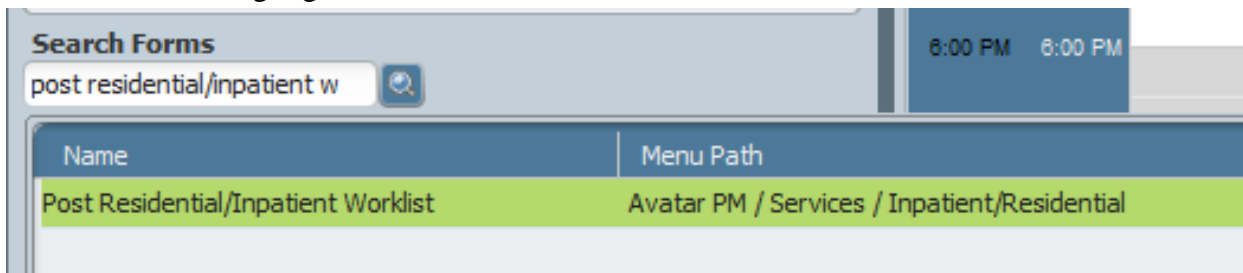


27. The last step to this process is **Post Residential/Inpatient Worklist**.

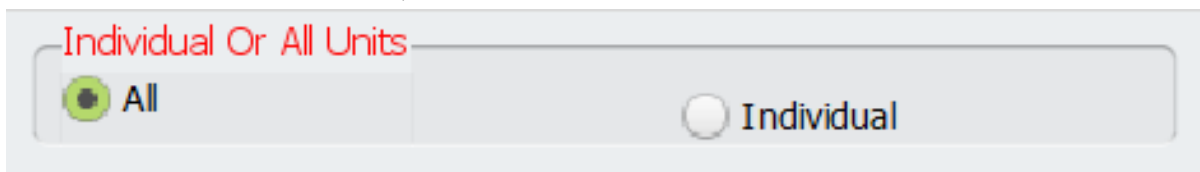
### Post Residential/Inpatient Worklist

28. From the Avatar Home Screen, search for the **Post Residential/Inpatient Worklist** form in the **Search Forms** widget.

a. Double-click the highlighted selected form.



29. In the **Individual Or All Units** field, choose **All**.



30. The **Post Charges From Date** and the **Post Charges Through Date** should auto-populate based on completing the previous forms.

a. If not, choose the correct dates that match steps 11 and 12 above.





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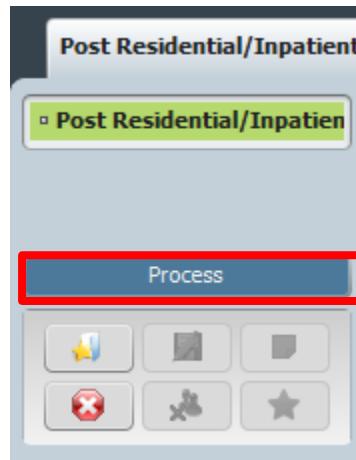
Post Charges From Date

08/20/2015
T
Y

Post Charges Through Date

08/27/2015
T
Y

31. Click **Process** on the left hand side to process the charges.



32. The **Post Room and Board Charges** report will display and reflect all the charges that were posted, and to whose account.

a. Save or print this report for documentation purposes by using the features at the bottom of the page.

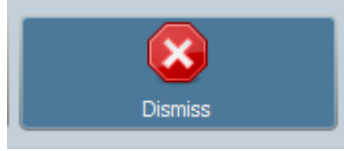
MEDICAL NUMBER	EPISODE NUMBER	CLIENT NAME	TYPE (RB/AD/DC)	SVC. CODE	CHARGE
PAGE NO. 1      Quest Counseling and Consulting Inc      RUN DATE: 09/21/2015 04:22 PM					
POST ROOM AND BOARD CHARGES					
FOR 08/20/2015					
UNIT Quest House					
42	3	BLOW, JOSEPH	RB	101	40.00
23	1	BOB, JOE	RB	101	40.00
17	1	CAR, MIKE	RB	101	40.00
45	3	CATMAN, BILL	RB	101	40.00
46	3	CLAUS, SANTA	RB	101	40.00
19	1	CLEAVER, BEAVER	RB	101	40.00
14	1	DEERE, JOHN	RB	101	40.00
11	1	FUNNY, DOUG	RB	101	40.00
13	1	KIL, JOE	RB	101	40.00
16	1	MOUSE, MICKEY	RB	101	40.00
22	1	RAPNICH, MARTIN	RB	101	40.00
10000000	1	SMITH, SALLY	RB	101	40.00
18	1	WERFLEMONSTER, JEDIDIAH	RB	101	40.00
<b>TOTAL: 13</b>					<b>520.00</b>



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33. Click **Dismiss** when the report is done.



34. In order to ensure the charge was posted to the client's account, from the Avatar Home Screen, search for **Client Ledger** in the **Search Forms** widget. (See **Client Ledger** policy and procedure.)

RUN DATE : 09/21/2015 04:28 PM

PAGE : 1

Quest Counseling and Consulting Inc  
3500 Lakeside Court, Suite 101  
Reno , NV 89509-4843  
Client Ledger

NAME: BLOW, JOSEPH	CASE NUMBER: 000000042
EPIISODE # : ALL	BALANCE OF ALL EPIISODES : 499.46
CLIENT STATUS FOR EPIISODE 2:DISCHARGED	DATE OF LAST SELF PAYMENT FOR EPIISODE 2 : NONE
CLIENT STATUS FOR EPIISODE 3:ADMITTED	DATE OF LAST SELF PAYMENT FOR EPIISODE 3 : NONE

EPISODE NUMBER	DATE	SERV	UNT	CHG	GUAR	GUARANTOR LIABILITY	AMOUNT RCVD	POSTING CODE	POSTING CODE TYPE	DATE POSTED	DATE BILLED	CLAIM NUMBER	LINE BALANCE
1	3	08052015	101	1.00	40.00	54	40.00	-----	-----	-----		OPEN	40.00
2	3	08062015	101	1.00	40.00	54	40.00	-----	-----	-----		OPEN	40.00
3	3	08202015	101	1.00	40.00	54	40.00	-----	-----	-----		OPEN	40.00
4	3	08212015	101	1.00	40.00	54	40.00	-----	-----	-----		OPEN	40.00
5	3	08222015	101	1.00	40.00	54	40.00	-----	-----	-----		OPEN	40.00
6	3	08232015	101	1.00	40.00	54	40.00	-----	-----	-----		OPEN	40.00
7	3	08242015	101	1.00	40.00	54	40.00	-----	-----	-----		OPEN	40.00
8	3	08252015	101	1.00	40.00	54	40.00	-----	-----	-----		OPEN	40.00
9	3	08262015	101	1.00	40.00	54	40.00	-----	-----	-----		OPEN	40.00
10	3	08272015	101	1.00	40.00	54	40.00	-----	-----	-----		OPEN	40.00

(GRAND TOTAL: 499.46 )

TOTAL BALANCE BY GUARANTOR

1)	Nevada Medicaid	39:	139.46
1)	SAPTA BA (Adult Block Grant)	54:	360.00

Bed Rates posted for the timeframe 08-20-15 through 08-27-15

35. Lastly, view the **Unit Verification Report** to ensure all pending bed rates have been posted.

### Unit Verification Report

36. From the Avatar Home Screen, search for **Unit Verification Report** in the **Search Forms** widget.

- a. Double-click the highlighted selection to open the form.



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The screenshot shows a search interface with a search bar containing 'unit verifica'. Below the search bar is a table with two columns: 'Name' and 'Menu Path'. The table contains one entry: 'Unit Verification Report' with the menu path 'Avatar PM / Client Management / Census Management Reports'. The time '3:00 PM' is displayed in the top right corner.

37. Enter the **From Date of Verification**.

- Click **T** for today.
- Click **Y** for yesterday.

38. Enter the **Through Date of Verification**.

- Click **T** for today.
- Click **Y** for yesterday.

39. Choose **For Individual Unit Or All**.

- All** or
- Individual**

The screenshot shows three fields from the verification form, each highlighted with a red box. The first field is 'From Date Of Verification' with the date '08/20/2015' and buttons for 'T' and 'Y'. The second field is 'Through Date Of Verification' with the date '08/27/15' and buttons for 'T' and 'Y'. The third field is 'For Individual Unit Or All' with radio buttons for 'All' (selected) and 'Individual'.

40. In the **Unverified/Verified/Both** field, choose the data to be displayed:

- Unverified**
- Verified**
- Both**

41. Click **Launch Unit Verification Report** to view the report.



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Unverified/Verified/Both

Unverified  Verified  Both

Launch Unit Verification Report

42. The report will display as a Crystal Report and will reflect the following data:

- **Verification Date** – this is the date of service that the bed rates were posted for
- **Unit** – this is the Unit for which the bed rates were posted for
- **Verified/Unverified** – this will display an “X” in the column for either **Verified** or **Unverified**
- **Verifying User** – this is the username of the person who completed the bed rates posting
- **Date Verified** – this is the date the bed rates postings were done
- **Time Verified** – this is the time the bed rates postings were done



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9/22/2015 8:06:29AM

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Quest Counseling and Consulting Inc  
3500 Lakeside Court, Suite 101  
Reno, NV 89509-4843

### Unit Verification Report

Verification Date	Unit	Verified	Unverified	Verifying User	Date Verified	Time Verified
08/20/2015	1 - Quest House	X		ADMIN,SAPTA	09/21/2015	05:11 PM
08/21/2015	1 - Quest House	X		ADMIN,SAPTA	09/21/2015	05:11 PM
08/22/2015	1 - Quest House	X		ADMIN,SAPTA	09/21/2015	05:11 PM
08/23/2015	1 - Quest House	X		ADMIN,SAPTA	09/21/2015	05:11 PM
08/24/2015	1 - Quest House	X		ADMIN,SAPTA	09/21/2015	05:11 PM
08/25/2015	1 - Quest House	X		ADMIN,SAPTA	09/21/2015	05:11 PM
08/26/2015	1 - Quest House	X		ADMIN,SAPTA	09/21/2015	05:11 PM
08/27/2015	1 - Quest House	X		ADMIN,SAPTA	09/21/2015	05:11 PM