

Avatar Account Request Form (SUD) Instructions

The Avatar Account Request Form (AARF) has been updated to coincide with the May 22 transition of mental health services to Epic.

The AARF is now used only for the onboarding, updating, or reactivating of accounts for users at SUD (substance use disorder) programs.

A workflow for requesting a new account is located at the end of this document.

Only the updated Avatar Account Request Form Needs to Be Submitted

To request a new Avatar account, or to update/reactivate an existing one, only the AARF needs to be submitted.

Once the AARF has been submitted, the Compliance Department will email the user a link to complete the remaining forms online.

The Avatar Account Request Form Must Be Typed

The AARF is a fillable PDF form that, except for signatures, *must be typed*. Red fields are required. Handwritten or incomplete forms will not be accepted.

We strongly recommend that you complete the form using official Adobe PDF software to ensure compatibility.

If you have questions about completing the form, contact the Avatar Help Desk at 628-217-5196.

Completed forms should be emailed to avataraccounts@sfdph.org. Save a copy of the completed form, with signatures, for your records.

As before, allow for 10 business days between the time you submit an AARF and an Avatar account potentially becomes available for use.

For a new Avatar account to be activated, both a Staff ID for the user must be generated by the Compliance Department *and* training must be verified.

All Avatar users are required to have a Staff ID *and* attend training, without exception.

When Is Training Required?

Training is required for all new accounts and when reactivating accounts that have been inactive for more than 365 days.

Training is not required when updating a currently active account or reactivating an account that has been inactive for less than 365 days.

There are no exceptions for individuals who have used Avatar in another county system. All staff members are expected to participate in training since the SFDPH environment is unique.

Training

Enroll your staff in training at your earliest opportunity. Training can be requested using the Avatar Account Request Form or by calling the Avatar Help Desk at 628-217-5196.

Account forms and links to the training schedules are available at:

<https://www.sfdph.org/dph/comupg/oservices/mentalHlth/BHIS/avatarUserDocs.asp>

On-Site Training by Certified Avatar Trainer

If you have a Certified Avatar Trainer at your site, submit the Attestation of On-Site Avatar Training at your earliest opportunity by emailing avataraccounts@sfdph.org.

NOTE: Only authorized personnel at Behavioral Health Services can certify Avatar trainers. If you have a staff member that you would like to have certified as an Avatar trainer, have that person call the Avatar Help Desk at 628-217-5196 to open a ticket and begin the process.

When an Avatar Account Request Form Is Not Needed

To have permissions added to an existing account, have a supervisor email a request to avataraccounts@sfdph.org, making sure to specify the exact forms/reports needed. Please note that the one's eligibility to access certain forms/reports is limited by one's credentials.

To add or remove co-signers on an account, have the user or a supervisor call the Avatar Help Desk at 628-217-5196.

To reactivate an account that has been inactive for less than 365 days at the same agency, with the same credentials, have the user call the Avatar Help Desk at 628-217-5196.

How to Complete the Avatar Account Request Form

- The form, except for the signatures, must be typed.
- Handwritten or incomplete forms will not be accepted.
- If you need to provide information that does not fit on the form, include that information on a separate page.
- If you have questions about completing the form, contact the Avatar Help Desk at 628-217-5196.
- If you have questions about the online credentialing process, please contact the Credentialing Unit at 415-255-3786 or 415-255-3406.

Below are instructions and information about completing the different sections of the form:

Staff Information

Please list your full name. The Staff ID generated by the Compliance Department and linked to your Avatar account is based on your legal name. If you have a preferred name, include it in parentheses in the First Name field (e.g., Samantha (Sammie)).

New Account

Check the New Account box if you are requesting an Avatar account in the city and county of San Francisco for the first time.

Reactivation/Update

If you are reactivating or updating an existing Avatar account, include your current username. **Do not check this box if you are adding a program.** If you check this box, we will replace your current agency information in Avatar—if it is different—with the information that you provide on the form.

Adding Program

Check this box if you are adding an additional program to your existing Avatar account. Include a separate page naming your current program/s.

Name Change

Check this box to change your name. Be sure that you have updated your NPI information (<https://nppes.cms.hhs.gov/#/>) and any licenses or credentials you have before submitting the form.

Avatar Staff ID Only (No Account)

Check this box if only an Avatar Staff ID is needed, and an actual Avatar account is not.

Agency Information

Include the requested information about the agency where you will be using Avatar.

Role Information

Check only the boxes that pertain to the work you will be doing at your agency. Ask your supervisor to assist you if you have any questions and to obtain the name of a Like Account (i.e., someone who does the same work you will be doing at your agency). A Like Account is especially helpful if your position at an agency is not a standard clinical or clerical one.

SUD System Code

List the System Code/s you need to access. Have your supervisor assist you if you are unsure of your System Code/s.

Co-Signers

If you require a co-signer, list the names of up to two eligible, currently active Avatar users at your agency. If you need add more than two co-signers, include the information on a separate page.

If you do not require a co-signer because you are a LPHA (Licensed Practitioner of the Healing Arts) or will not be doing clinical work in Avatar, check the appropriate box.

Training

Use the fields in this section to request a specific training and date.

Current Training schedules are available at the following link:

<https://www.sfdph.org/dph/comupg/oservices/mentalHlth/BHIS/avatarUserDocs.asp>

If training will be conducted on-site (by a Certified Avatar Trainer at your agency), include the Attestation of On-Site Avatar Training when you submit your Avatar paperwork.

Required Signatures

Complete all of the fields in this section. An account must be authorized by a supervisor, and the employee and the supervisor must be different people. (Digital signatures through programs like DocuSign are acceptable).

Requesting a New Avatar Account

