

Moving a Client to a Different Admitting/Primary Clinician

Rationale and Timing

There are various clinical, logistical, and administrative reasons why a client may need to be reassigned from one admitting or primary clinician to another. This process should be handled thoughtfully to ensure continuity of care and to maintain a strong therapeutic alliance.

Common Reasons for Reassignment

- Staffing Changes: The current clinician is no longer with the agency due to resignation, reassignment, or leave of absence
- Caseload Management: Caseload balancing to ensure clinicians can provide appropriate attention and care to all assigned clients
- Specialized Needs: The client requires services outside the current clinician's scope of practice or would benefit from a clinician with a specific area of expertise (e.g., trauma, co-occurring disorders)
- Client Request: A client may request a new clinician due to a perceived mismatch in communication style, cultural understanding, or other therapeutic concerns
- Clinical Judgment: Based on supervision or team discussions, it may be determined that a different clinician is better suited to support the client's treatment goals
- Program Transitions: The client is transitioning between levels of care or programs within the agency that require assignment to a new clinician

When to Reassign

- As soon as a change in staffing occurs that affects the client-clinician relationship
- Upon identification of a clinical or logistical issue that impacts treatment effectiveness
- During treatment plan reviews or case consultations that identify the need for change
- At the client's request, following discussion with supervisory staff or care team

Process Considerations

- Communicate clearly with the client about the reason for the change
- Ensure a warm hand-off whenever possible, including joint sessions or transition meetings

- Update documentation and records promptly to reflect the new clinician assignment
- Inform all relevant team members and coordinate care as needed to minimize disruption

Reassigning clinicians should always be done with the client's best interest in mind, prioritizing trust, continuity, and therapeutic engagement.

How to move a Client to a Different Admitting/Primary Clinician

A client will appear on your caseload if you are listed in either of the *Admitting/Primary Clinician* or *Attending Practitioner/Physician* fields on the client's Admission form (see Figure 3).

When admitting a client, entering an *Admitting/Primary Clinician* is required. (Entering an *Attending Practitioner/Physician* is optional, and the field cannot be edited on an admission form.) There are numerous reasons to move a client from one clinician's caseload to another's (e.g., the current clinician is no longer at the agency). One of the most straightforward ways of assigning a client to another clinician is to edit the client's Admission form, adding the new clinician's name in the *Admitting/Primary Clinician*, replacing the existing clinician's name. Most Avatar users can edit a client's admission form.

Editing the Admitting/Primary Clinician Field

1. Single-click on the desired client's name on the Client/Staff widget (see Figure 1) to highlight them.

NOTE: If the client is not assigned to you and therefore not listed under My Clients in the Client/Staff widget, enter the client's name in the *Search* field. Once you select the desired client, they will appear, highlighted, under Recent Clients.

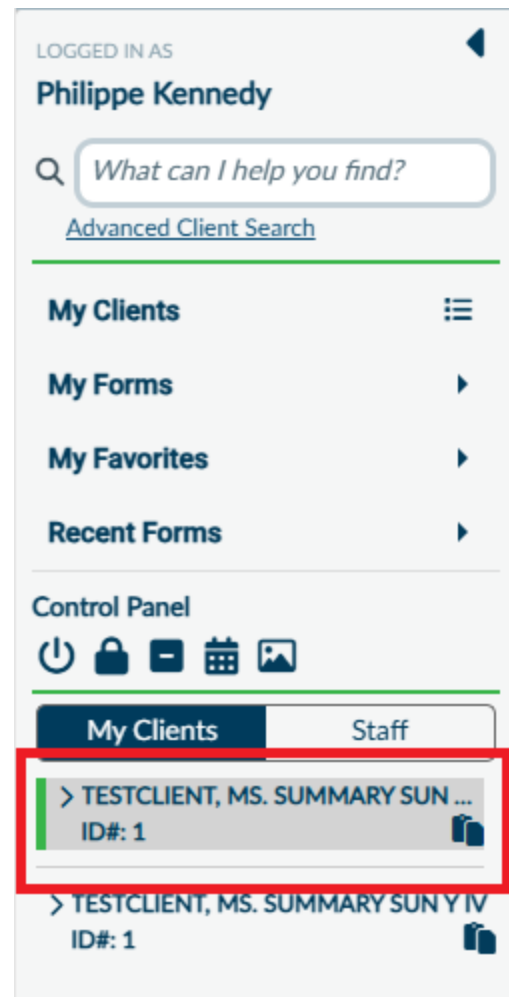


Figure 1: The Client/Staff widget showing a client caseload, with client selected

- After you have highlighted the name of the client, type “admission” into the *Search* field (see Figure 2) and select the desired admission form from the options that appear.

NOTE: If you access an admissions form without first highlighting a client name you will need to search for your client by completing at least three fields in the Search Client dialog that appears. (You will save yourself a lot of time by highlighting the client’s name before accessing the desired admission form.)

Figure 2: Searching for “admission”

- If the client has more than one episode in Avatar, you will need to select the desired episode (either by double-clicking the episode or highlighting the episode with a single click and then pressing the *Edit* button).
- On the admission form that appears, you will see the name of the assigned clinician in the *Admitting/Primary Clinician* field. (Verify that you have accessed the correct episode and that the expected clinician is listed).

Figure 3: The Admission (Outpatient) form showing the Admitting/Primary Clinician

- In the *Admitting/Primary Clinician* field, delete the name of the list clinician, search for and select the name of the new clinician, and then press *Submit*. The client will disappear from the previous clinician’s caseload and appear on the caseload of the newly assigned clinician.

6. If you encounter any difficulties with this procedure, contact the Avatar Help Desk at 628-217-5196.

Editing the Attending Practitioner/Physician Field

The Attending Practitioner/Physician field is typically reserved for a prescribing clinician and as noted above, cannot be edited using the admission form. To alter, change, or remove an attending practitioner/physician an Avatar user with supervisor permissions should use the Attending Practitioner form (see the February 1, 2018 Avatar Bulletin: Attending Practitioner).

Moving a Large Number of Clients to Another Clinician

Avatar users with supervisor permissions can use the Transfer Practitioner Caseload form to move a large number of clients from one clinician to another.