



# **Introduction to Avatar Look-Up Only**



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## Introduction to Avatar - Look-Up Users

This reference guide focuses on how to **navigate** through the Avatar Electronic Medical Record and will assist you to quickly “Look Up” client data. Information is presented in sections; each section includes a written description, including visual screen shot examples. This is a companion to the online Internet and LMS “Introduction to the BHRIS Avatar Electronic Medical Record Training” which is narrated and includes step by step demonstrations and is located at <http://www.smchealth.org/onlinetraining>.

This reference guide will help you understand how Avatar works, how to navigate through Avatar Menus, and what the Avatar Menus, Commands and Tasks mean.

You will become fluent in the *language* of Avatar, understanding what terms and which format is required when searching for or requesting client information.

You will learn which Avatar documents include important clinical/fiscal and administrative client data and where these documents are located.

You will learn how to create a Client Alert and Urgent Care Plan.

**Once you have completed the training, you will be sent your password in an e-mail within 10 days. Information about passwords is located in Section 2.**

### Section 1:      **What is Avatar?**

- San Mateo’s Electronic Medical Record/Information System.
- Meets federal mandate to convert from paper to electronic medical records by 2015.
- Integrates clinical, fiscal, administrative and management information in one place.
- Provides access to client information 24/7- helps clinical teams make decisions/handle emergencies.
- Provides client care coordination for the treatment team.
- Improves quality/continuity of care.
- Minimizes time managing paper records and finding lost charts.
- Avatar software application from NetSmart Technologies is used by 28+ California counties.
- Has been operational in San Mateo County for more than 1 year, paper records for all clients open since 2004 have been scanned into the Avatar record.
- May need to request paper chart if looking for documentation prior to 2004.
- Clients with a Medical Record/ID # greater than 930000 have never had a paper chart.



## Section 2: How do I Log-On to Avatar?

General Log On, PES Log On, About Passwords, Help Desk, Ethics/Your Role/Your Password, PES Map to a Printer within a Remote Session

### A. General Look-Up User Log-On – BHRS, External (Aging & Adult), Administrative Assistants, Contractors

**First:**

Log-On to Windows.

**Second:**

Look to see if you can find the Avatar icon to determine if the Avatar application has or has not been installed on your computer.

This is the Avatar icon.



You can look for the Avatar icon on your desktop, click to open the application.

Or

You can look for the Avatar icon through your START menu, click to open the application.

Or

You can get yourself to the Avatar application if you click on the Internet Explorer icon and then enter <http://svmid/ntst/radplus> in the browser window.

**Third:**

When Avatar is launched it will open to the Avatar Homepage and you will need to Log-On. Look to the left for **User Authentication**, then click on it. This window will pop up:

System Code	<b>You will be sent this</b>
User ID	<b>YOUR USER ID</b>
Password	.....

With your **CAPS LOCK ON** You will enter the System Code, User ID and Password information that will be sent to you.

You will be prompted to enter **your own** password - 8 characters, at least 1 must be a number.

- **Write down your password;** Avatar gives you 3 tries, if you forget, if you didn't use the cap lock and/or if your log-in fails; your password will need to be reset by contacting the ISD Help Desk (650) 573-3400.

\* Avatar automatically locks you out after 30 minutes to 1 hour of no use - you may receive a warning that time has elapsed since last use; you can cancel the warning and remain active or if you need, just log

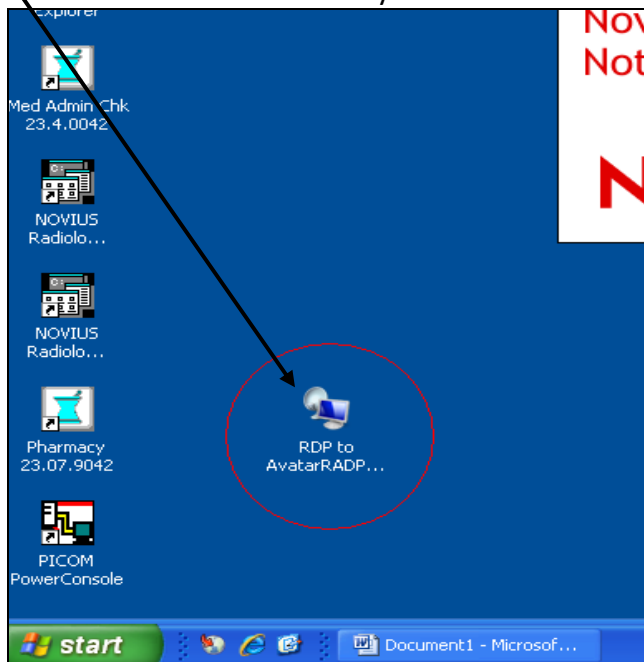


back in. Windows will lock you out after 10 minutes of no use and you will need to re-enter your Windows password.

**B. PES Look-Up User Log-On** – The SMMC PES desktops contain software that is incompatible with Netsmart Avatar. Therefore, **PES users must use a remote connection** to Avatar and once on that connection, manually map the PES administrative printer to the Avatar session.

Step by Step Instructions:

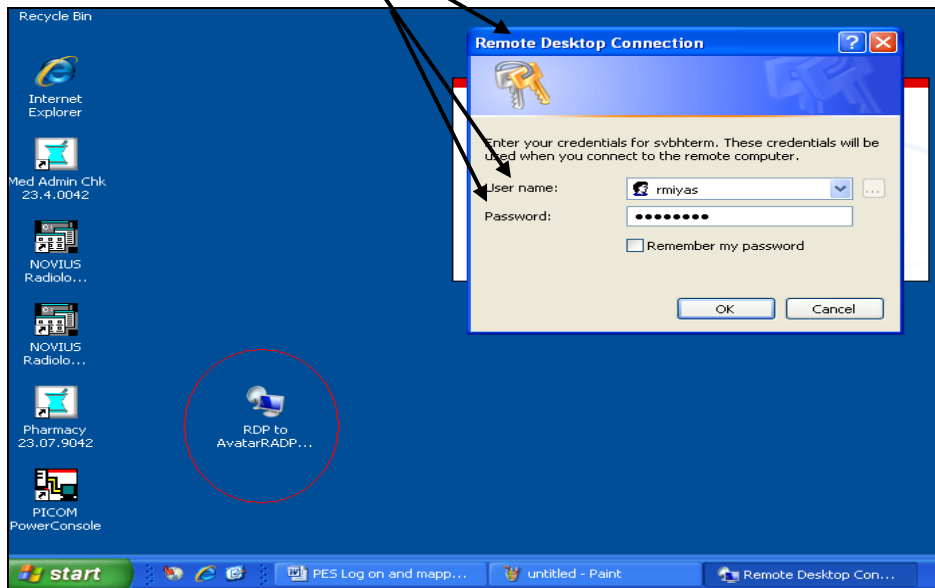
**First** - From a PES desktop computer, locate the icon to start Avatar on your desktop and double click. This will be your link to Avatar.







**Second** - Login to the **remote desktop** using your regular Windows User Name and Password, click ok.



**Third** - Now you see that a **second Windows screen** appears. Use your same Windows User Name and Password here and click ok.





**Finally** - The Avatar screen appears and on the left hand side, you will see and click on **User Authentication**. Now you can Log-On to Avatar.

**With CAPS LOCK ON Enter:**

**SYSTEM CODE**

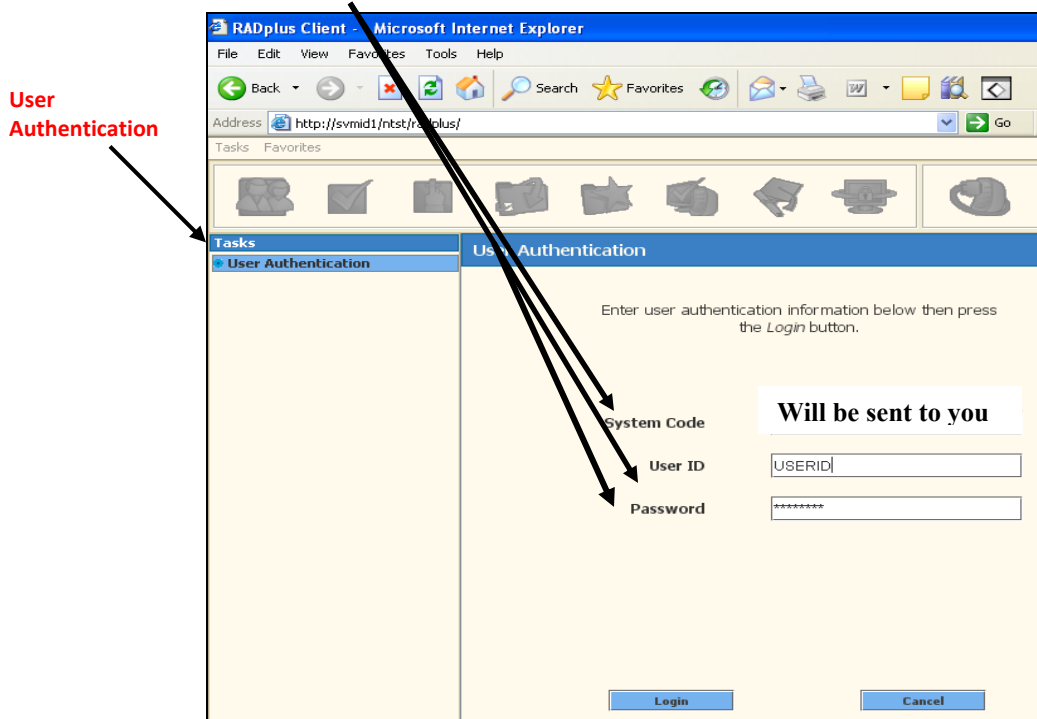
**You will be sent this**

**USER ID**

**You will be sent this**

**PASSWORD**

**You will be sent this**



- You will be prompted to enter **your own** password - 8 characters, and at least 1 must be a number.
- **Write down your password.** Avatar gives you 3 tries; if you forget, if you didn't use the cap lock and/or if your log-in fails, your password will need to be reset by contacting the ISD Help Desk (650) 573-3400.

\* Avatar automatically locks you out between 30 minutes to 1 hour of no use - you may receive a warning that time has elapsed since last use; you can cancel the warning and remain active or if you need, just log back in. Windows will lock you out after 10 minutes of no use and you will need to re-enter your Windows password.

**⚠ PES - Please refer to the end of Section 2 on Page 12 for how to map a printer so that you can print a face sheet or other documents.**



### **C. About Passwords**

When you are sent your password and log-on for the first time, you will need to enter a personal password to replace the system-generated password. This will become your **active Avatar password for the LIVE system. Protect it!**

To create your personal password, you must comply with the following:

- Minimum 8 characters
- Must contain at least one number and one alpha character
- Case sensitive- recommended that you use all caps for the alpha characters
- You will be prompted to change password every 90 days, the prompt will appear only once, so when the prompt appears, change your password. Once your password has expired it will not work and if you try and fail 3 times you will need to get your password reset through the Help Desk.

### **D. HELP DESK**



**Forget Your Password? Got locked out?**  
Contact ISD Help Desk 650-573-3400

[ISDHelpDesk@co.sanmateo.ca.us](mailto:ISDHelpDesk@co.sanmateo.ca.us)

### **E. ETHICS/YOUR ROLE/YOUR PASSWORD**

- The Password that will be sent to you is YOUR signature.
- No one has Access to your password; however, it can be reset if you are locked out.
- **NEVER** give out your password, it is a HIPAA violation, there are sanctions.
- **Confidentiality**- If you know a client or family member, it is your professional obligation to report this to your supervisor. You will not be assigned this client and the medical record will be blocked/restricted to uphold strict confidentiality protections on behalf of the client.
- When you meet with your client, ask if they have a family member working for or receiving services from the BHRS system, that medical record will also be blocked/restricted.
- While clinicians have access to the electronic medical records of all BHRS clients, off caseload activity can be monitored and access can be restricted if necessary.

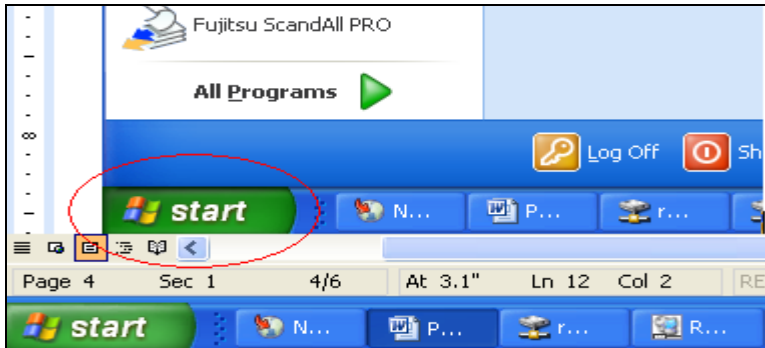


## F. PES Map to a Printer Within the Remote Session

Once you are logged in you will need to map to a printer to print face sheets and other documents.

**First:** Minimize your Avatar screen.

**Second:** Select the **top Start button on the lower left hand side of your screen.** (Note that the **start background color may be grey, not green** as shown circled below.)

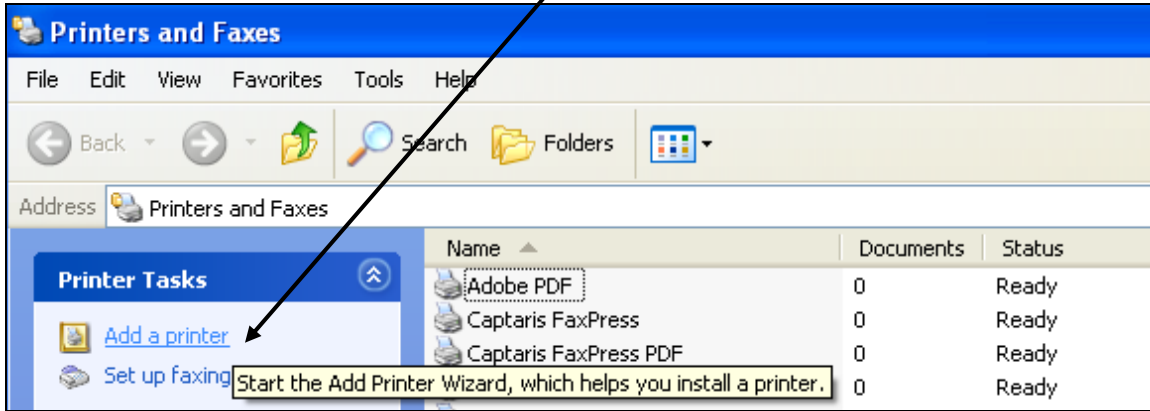


Next: Choose Printers and Faxes from the Menu.



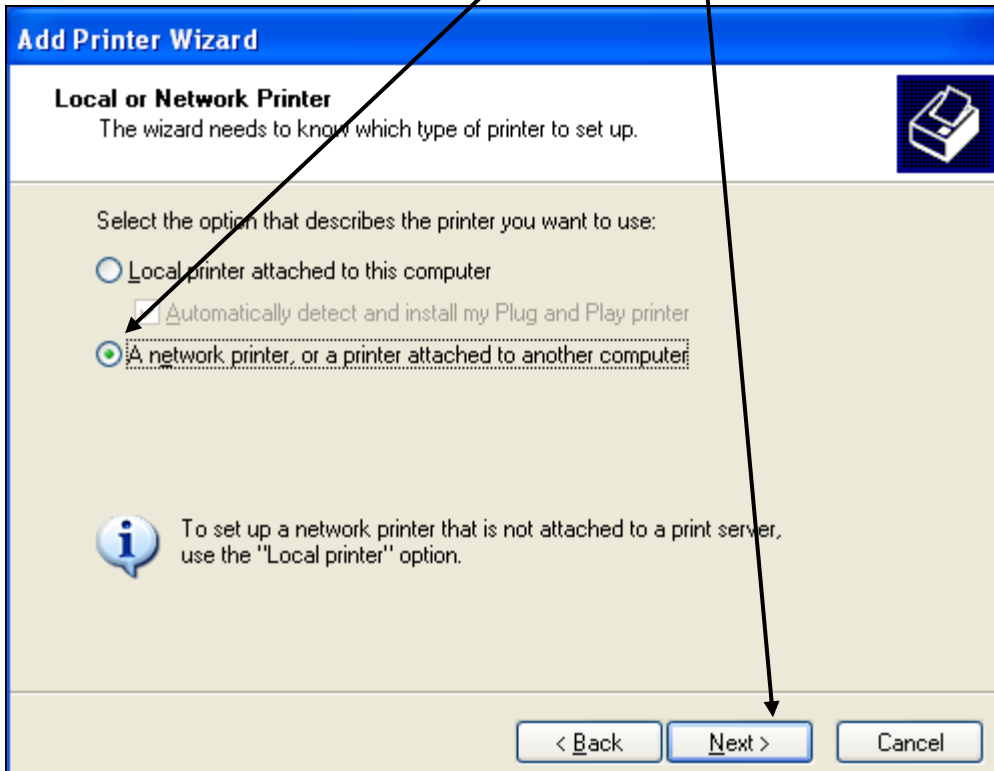


On the next menu, select "ADD a printer"



Then click "Next".

On the next screen select "A Network Printer" then click next.





You will need to type this information if you are printing to a PES Printer:

[\\svservices2\PTDTTC1078B.](#)

Then click "Next".

If you are not printing to the PES printer, you would need to obtain the name of the printer to enter. And then click "Next".

When the next screen come up, click "yes" to the question "Do you want to use this printer as your default printer?"

Then click "Finish" to finish the installation.

😊 **Now you know how to Log-in to Avatar and get HELP!**

You want to look at the client's chart but **first** you need to understand some of the **language** and **terms** used in Avatar and the **Avatar Menus, Task Options and Commands**.

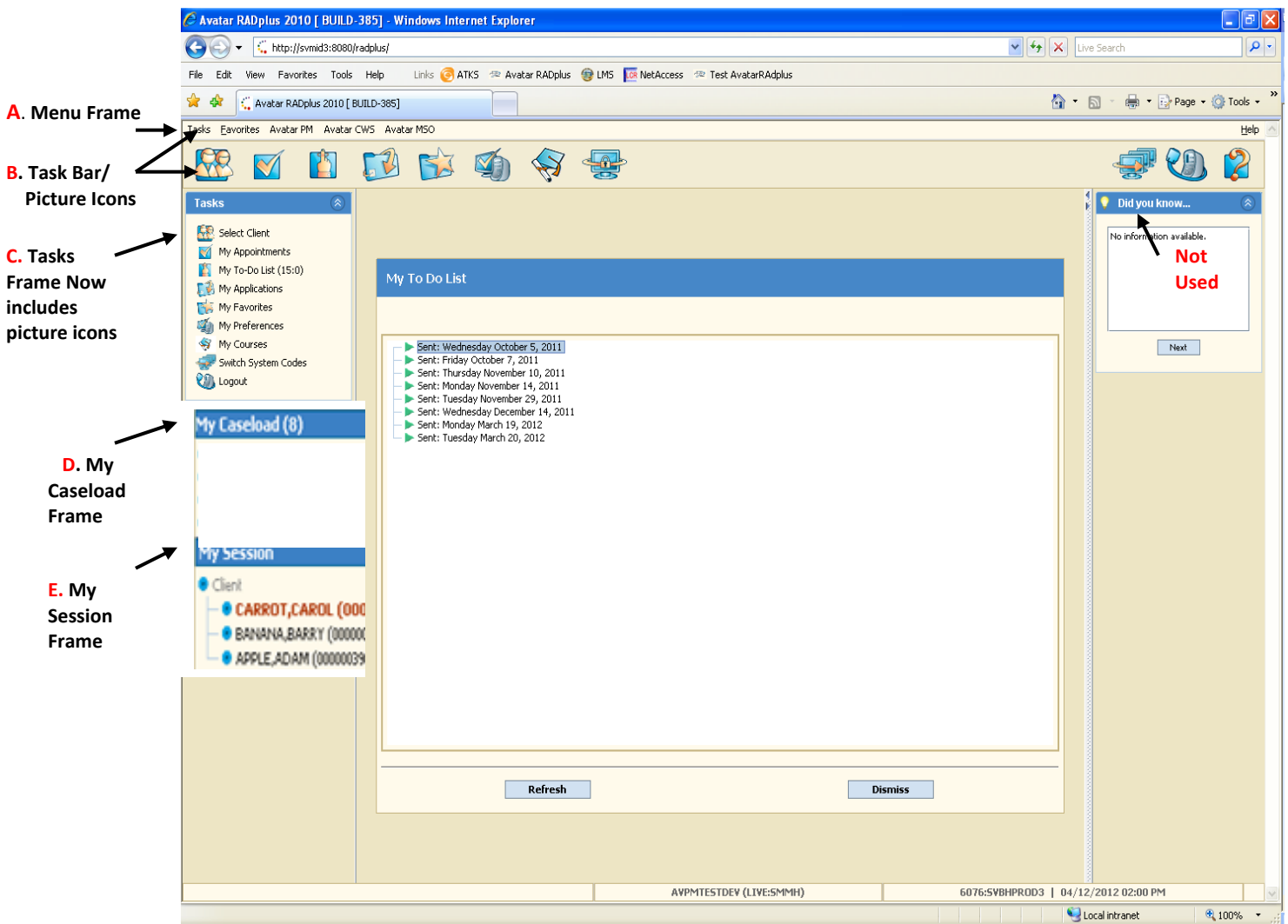


### Section 3: Overview of the Avatar Homepage

Menu Frame Options: Favorites, Avatar PM/CWS/MSO/Info-scriber/Document Imaging/Help;  
Tasks Menu Options, Select Client, Favorites, Lock, Log-Off, ?, HELP, My Session, Refresh

Look at the opening window, also known as the **Avatar Homepage**. This screen shot provides an overview of all Menus and Task Options in Avatar.

A. The **MENU FRAME**: (A) shows **Tasks, Favorites, Avatar PM, Avatar CWS, Avatar MSO** and all the way to the far right is **Help**.



When you click in Tasks in the Menu Frame (A) there will be a drop down list of options for you to select. The **Task Bar/Picture Icons** as shown in (B) and the **Tasks Frame (C)** include the same options.

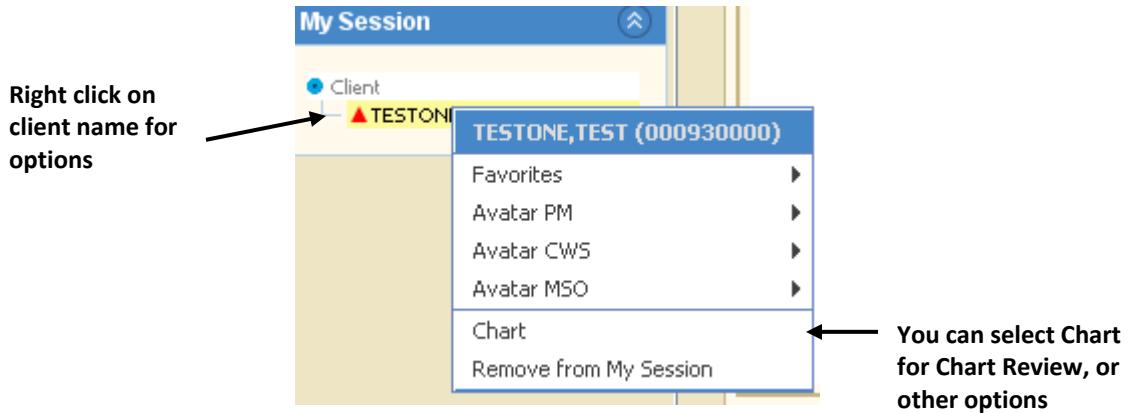
⚠ You can select task commands from any of these 3 places.

**Menu Frame      Task Bar/Picture Icons      Tasks Frame**

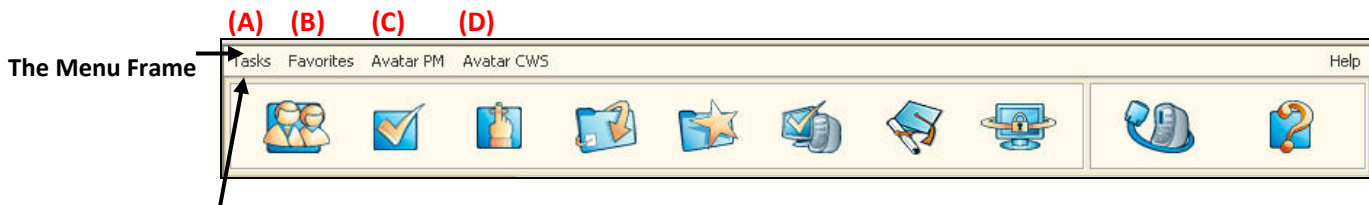


You can **also** right click on a client name in 'My Session' (E) for the menus/options above. In the "My Session Frame" an **active** client will appear in orange.

As a Look Up ONLY User you will **not** have a client in (D) My Caseload, however, as you perform a client search or Look-Up and a client name is present in (E) My Session, you can right click on the client name and a pop up window will show menu options where you can select *Chart* for Chart Review information.



The Menu Frame has menus that contain every command in Avatar:



**(A) Tasks Menu OPTIONS** - The Tasks Menu in the Menu Frame, is a drop down menu that includes: **Select Client**, My Appointments (not used by BHR), **My "To Do" List**, My Applications (not used by BHR), **My Favorites**, **My Preferences**, My Courses (not used by BHR), **Lock**, and **Logoff**

**(B) The Favorites Menu** - this is a shortcut that allows the Avatar window to **display your customized 'favorite' documents/reports so that all you need is to click on the Favorite you set up and that show on your homepage and you can go directly to that form or report.** Once saved, favorites are stored and available to you from any BHR computer.

**(C) The Avatar PM Menu** - Practice Management - contains Client Management, and Utilities functions, the administrative area of Avatar, for examples: business/billing, call intake, admission, family registration (UMDAP), discharge tasks. **Not used by Look-Up Users.**

**(D) The Avatar CWS Menu** - Clinical Work Station- contains the clinical features, Assessments, Treatment Plans, Progress Notes, and **Reports like the Client Dashboard Report which has links to the client's diagnosis, medication, episodes, and treatment history. Also, any document or report open through CWS will provide access to Chart Review where you can view the entire client's chart;** 90% of work is through this menu; CWS provides a multidisciplinary, integrated view of client information. Chart Review





can also be accessed by right clicking on the client's name in My Session and selecting Chart for Chart Review from the pop up.

**B. Other AVATAR MENU RESOURCES**

**The Avatar MSO Menu** - this application is designed for the private provider network to credential providers, authorize services, adjudicate claims, and reimburse providers. **Not used by Look-Up Users.**

**The Avatar Info-Scriber Menu** - this is the Electronic Prescription application for the MD to prescribe medication, review medication history, monitor drug/food interactions, display drug/allergy alerts. **Special access is required. Look-Up Users will view medications through the client's face sheet report!**

**The Avatar Document Imaging Menu** - allows Electronic Scanning of information- for example, if external clinical info is received from the hospital, it must be scanned in to client Avatar episode.

**Help Menu**- links to online documentation and search options.

**C. TASK OPTIONS: DETAILS of the TASKS MENU (A) TASK BAR/PICTURE ICONS (B) and TASKS FRAME (C)**

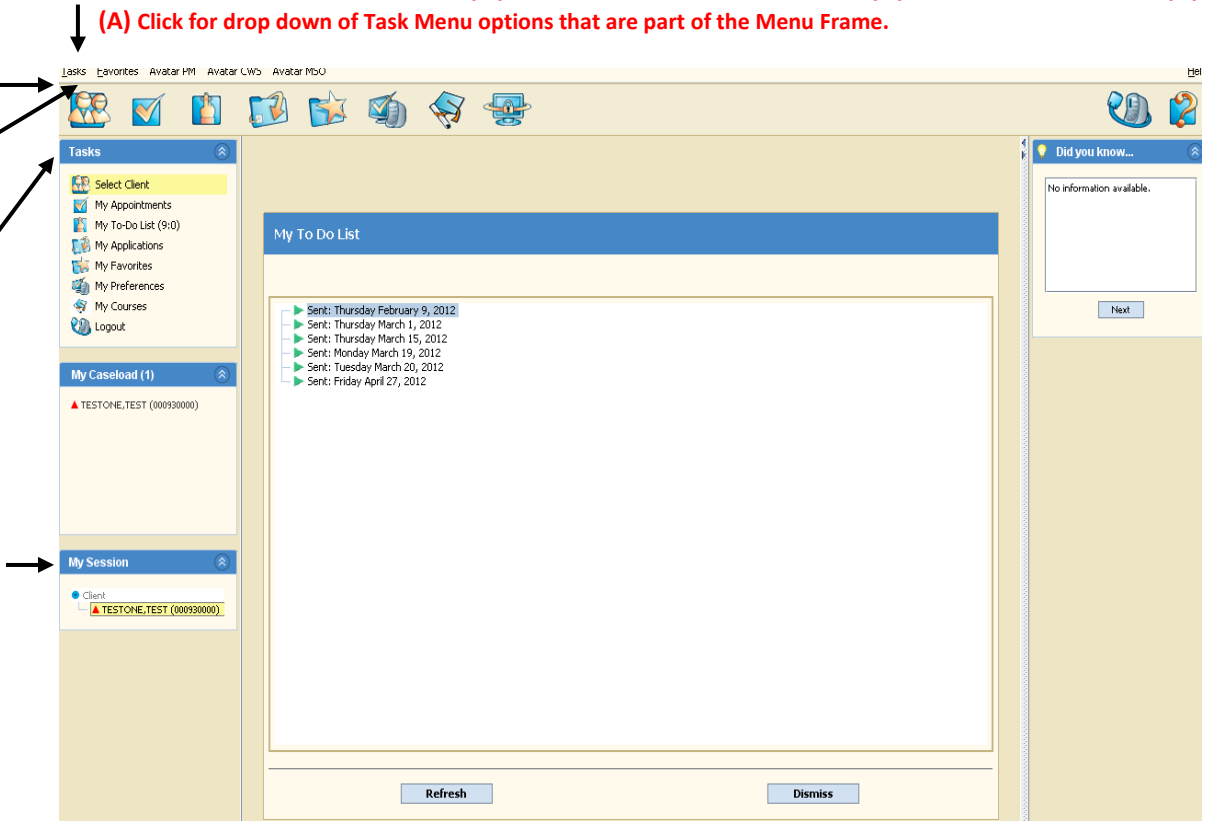
(A) Click for drop down of Task Menu options that are part of the Menu Frame.

1. Menu Frame

B. Task Bar/  
Picture Icon

C. Tasks Frame

D. My Session





### Select Client

This is a quick way to look up clients, add clients to 'My Session', MUST "Select Client" to request certain reports or documents. Client search results will show in the bottom half of the screen; the Up and Down arrows on the keyboard can be used to scroll through names and the Enter key can be used to highlight a row.

You can **Select a Client** by entering:

\*Medical Record Number; \*LastName ; \*LastName,First (no space); \*LastName,First JR (space only before title); \*LastName,First MI (space only before middle initial); \*Hyphen (Maria Lopez-Cantera); \*Apostrophe (Angelo D'Marco); \*Birth Date; \*Alternate Look Up: Social Security #; Alias- LastName,Alias; Soundex-Similar Sounding Name (e.g. Browne vs. Brown). \* Please see **Appendices**, for step by step "how to" Select Client.



### My Favorites

This is an Avatar function for you to create a short cut to YOUR most often used documents or reports. You create Favorites by clicking on Favorites until the Favorites folder appears on the Avatar homepage. Right-click on the Favorites folder icon and choose Add Folder from the pop up menu. An Input dialog box appears for you to type the name of the New Folder, then click OK. Place the mouse pointer over the "favorite" document or report you want to add from the Avatar CWS Menu. Left Click and hold down, while you drag the "favorite" document or report to just below the new folder. Then release the mouse button. Click the save button on the bottom of the screen. You can repeat this for each favorite you want to create for this folder or by creating a new folder and then adding documents/reports to it. \* Please see **Appendices**, for other alternatives for creating "favorites"





### Lock Application

If you click on the "Lock" application, client information will be protected and cannot be viewed if you leave your computer for short time. Locking the application restricts unauthorized access. You will be required to enter your Avatar Password to unlock Avatar when you return; however, the screen will be at the exact state where it was before it was locked.



### Log-off

You should **log off** when you are leaving the office at the end of the day so the system will shut down properly. When you **log off** the Avatar application closes completely. **USE THIS METHOD, NOT the ** in the upper right corner of the Avatar window. When the message appears asking if you are sure you want to logoff, click the "Yes" button at the bottom of the window. **Once you Log-off, then use the red  close button in the upper right hand corner of Internet Explorer.**



### Help

Help provides Links to online documentation and search options- this is currently under construction. The **question mark**, provides a hyperlink that connects you with the most current versions of the Introduction to Avatar Reference Guides and other quick reference guides. Here is the direct link: <http://smchealth.org/avatarguides>



### **My Session (D)**

Contains **active** clients, clients you are currently working on, the **ACTIVE** client will appear in **ORANGE**. A right click will show an option to remove a client from “My Session”.

### **Refresh**

There is no icon for this option. This command will allow any new report or feature that may have been added to Avatar, while Avatar has been in use, to become available in your menu or on your screen once you have **refreshed** your screen.

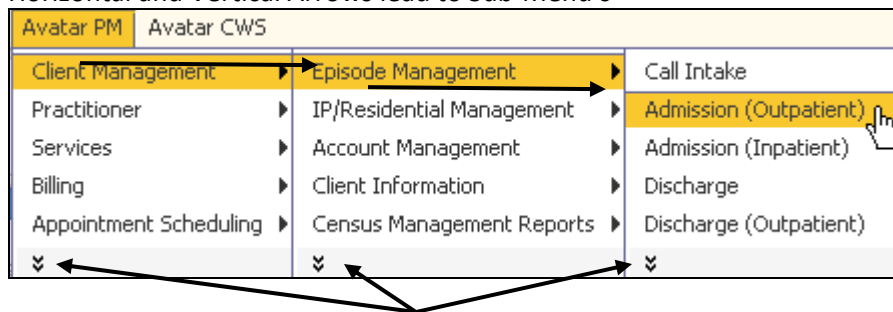
😊 You now know about Avatar Menus, Tasks Menu Options and Avatar terms! You know how to Select a Client, Create Favorites, Lock and Log-Off!

You **still** want to look at the client’s chart; but **first** you need to understand **Avatar Navigation Features**. You will need to use these features to request reports and for creating a Client Alert or Urgent Care Plan if you need to communicate about a client issue or concern.

## **Section 4: Navigation Features of Avatar Electronic Medical Record**

**A. ARROWS/SUB MENUS:** Avatar Menus can be expanded to present more options. If a menu has an **arrow on the right it means there is a sub-menu**; if you drag the cursor horizontally through the sub-menus, you can view more options and then click to choose your selection.

Horizontal and Vertical Arrows lead to Sub-Menu’s



There are double arrows (called chevrons) that also act to expand menus. You can slide your cursor vertically down and click on **the double arrows, the menu will expand to show more choices**.

### **B. WINDOWS/TABS/PAGES:**


#### **Windows:**

When you open any document a **Client Window** will open. Many documents may be open within that 1 **client window**. For example, the screen shot on the next page shows a **client window** that contains **open** documents for this client; look at the bottom, the Urgent Care Plan document is on the left, the Client Alert document is in the middle and Chart Review is on the right. **\*(A)** see next page



The **window name** appears in the blue title bar at the top; this is the Urgent Care Plan document **(B)** and the client's name and MR# are present **(C)**. If you click on Client Alert, the **window name** will change to *that* document. You can switch between documents within a *client window*.

**Please Note:** The client's name, MR#, date of birth and sex are also present in the line just below the toolbar **(D)** and, the client's name should appear orange or active in the "My Session" frame.

 When you open a *client window* be sure to use the 'rule of 3' checks so that you are viewing information on the correct client. (Client name is orange/active in "My Session"; it matches with client name in blue title bar and client name in the line just below the toolbar!)

**Tabs:**

A document may be divided into **Tabs**. A *Tab* divides a window into smaller pieces (e.g. a tab is similar to a tab that would be present within a section of a paper record). If there is more than one *Tab*, you must complete information for each *Tab*. You can switch between *Tabs*. The active *Tab* that you are working in will always be orange. The screen shot shows only 1 *Tab*. **(E)** Disregard "flags" that you may notice on a tab or next to a field. This is a visual indicator to a clinician that there is an incomplete or missing entry.

**Pages:**

A *Tab* may contain more than one **Page**. If all fields within a tab cannot fit into a single screen, Avatar divides the tab into multiple **Pages**. If there is more than one **Page** within a tab, you must complete information for each **Page**. The active **Page** you are working in will always be orange. The screen shot below shows there are 2 **Pages**. **(F)**



**C. The OPTION TOOLBAR:** The option toolbar appears at the top of all windows in Avatar.



	<p><b>1. Back/Forward:</b> Click these icons to move back and forth between multiple pages in a tab.</p>
	<p><b>2. Close:</b> Click this button to close a window.</p>
	<p><b>3. Home:</b> Click this to return to the Avatar Homepage without closing the current window.</p>
	<p><b>4. Submit:</b> Click this to SAVE or FILE data in the current window; typically when you submit the window closes.</p>
	<p><b>5. Lock:</b> Click this to protect client data if you leave your computer for a <i>short time</i>. Your password will be required to unlock Avatar but the Lock application returns you to the exact state your computer was in before it was locked.</p>
	<p><b>6. Copy, Cut, Paste, Spell-Check:</b> Click this to cut, copy, and paste text between fields in Avatar.</p>

**D. IMPORTANT**

- Always look at the screen and the command you have selected to see **what you are being asked to do**: save, file, apply, dismiss, add, ok, cancel?
- Usually a **left click is to select** and a **right click is to do**.
- **Program** - References to **program** mean the place/site where you are assigned to work or where you want to obtain client information.
- **Episode** - References to **episode** mean the opening (admit) and closing (discharge) at a **program**. A client may have many episodes of care. If an **Episode Display Screen** appears when you select a document or report, you **MUST** be sure to select the correct open episode which will be the **open episode** for the program you want to obtain client information. In an open **episode**, the discharge date will indicate NONE; historical information is in **episodes** that are CLOSED.
- **Pre-Display Screen**: When you select documents or reports, sometimes a **Pre-Display Screen** will appear that shows items that are in draft and need to be final. Sometimes a **Pre-Display Screen** will show documents and their status, for example Client Alerts and/or the Urgent Care Plan.

Now you know the **Avatar Menus, Tasks, Commands, and Toolbar Options** that will help you navigate through different Avatar screens and windows.



☺ You are now ready to view the Client’s Electronic Medical Record and locate the documents and reports that have been entered into Avatar!

## Section 5: The Client’s Medical Record: Avatar Reports

### A. About Reports:

If you imagine a client’s paper chart that has sections for assessments, consents, treatment plans, medications and progress notes, well Avatar **REPORTS** is how you can view completed documents.

You request a report through Avatar CWS ↓ Reports; slide your cursor horizontally and/or vertically to select the report you need. **Look to see what is required to submit the report you are requesting; some reports require a certain date range, a specific program, episode selection or clinician ID.** The Client’s **Dashboard Report** and **Chart Review** include most of the clinical, fiscal and administrative client information that Look-Up Users will need.

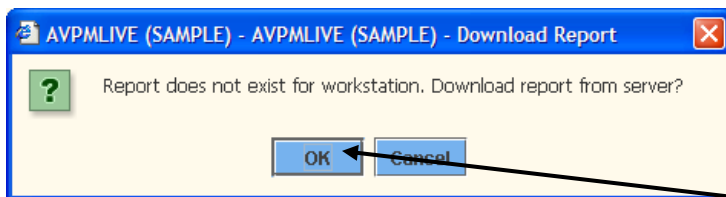
### B. The Crystal Report Application:

**Crystal Reports** is a software application that gathers information already entered into Avatar and presents it in a comprehensive, easy to view report format. You can select a report to view a section of the chart or a specific document and can print the document or section from the Avatar report screen. Sometimes there may not be any information when you run a report. For example, if a client is not on any medication, the Avatar medication report would be blank same as in a paper record, there would be blank medication sheets.

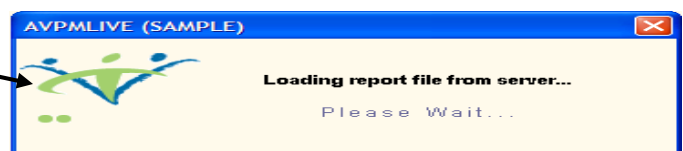
### C. The Crystal Report Submit Icon:



You will click on this Submit icon when you are requesting any report. The Report Submit icon has a squiggly line and will be present on many other reports that you may request. Once you click on the Report Submit icon these report pop up messages may appear:



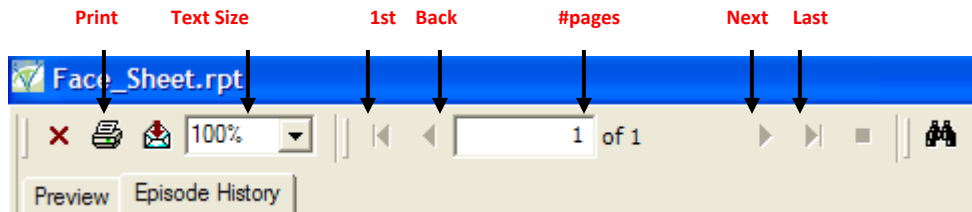
Click, OK to this pop up message to download the report. Then this following pop up message may appear to let you know the report is in process:





#### D. Standard Report Toolbar:

Reports use a standard toolbar as shown below:



You can print from the report screen, increase the screen size, view the total number of pages in the report and the current page you are viewing and you can move forward and back pages.

When you run any report it may take some time to download as all the information is being gathered from various places in the Avatar system. **Be Patient!**



## Section 6: The Client Dashboard Report

### A. Understanding the Client Dashboard Report

The Client Dashboard Report gives you a snapshot of your client's critical clinical information in one page. This report is designed to be viewed "live" in Avatar and has links to more information about your client than is displayed on this page alone. This document explains the various sections of the report and how to read the information presented. Below, there is an example of the report as it will appear when you run it in Avatar. See D. Dashboard Report Locations next page

### B. Screen Shot of the Dashboard Report

review | View all Contacts | Allergy Info | Other Assigned Staff | Dx History | Tx History | Episode Hx | Progress Notes | ICI Notes



**SAN MATEO COUNTY  
BEHAVIORAL HEALTH AND RECOVERY SERVICES  
CLIENT DASHBOARD**

**Client Demographic Information**  
**TESTONE.TEST (930000) D.O.B. (5/8/1962)**

<b>Gender:</b> Male	<b>SS #:</b> 222-55-9999	<b>Age Today:</b> 50
<b>Address:</b> 1245 BYE STREET - INFOSCRIBER TEST SAN MATEO, CA 94403 (h) 650-589-1172 (c) 650-258-3698 (w) 555-1256	<b>CCP Coordinator:</b> MEALEY,JEANNINE <b>Anniversary Date:</b> 05/01 <b>Treatment Consent:</b> 8/2/2012	
<b>Language:</b> TONGAN	<b>AKA 1:</b> testjoe	
<b>Preferred Language:</b> Unknown / Not Reported	<b>AKA 2:</b> rodney mytest	
<b>Ethnicity:</b> Unknown / Not Reported	<b>Living Situation:</b> Homeless, no identifiable residence	
<b>Race:</b> American Indian or Alaska Native, Asian Indian, Black or African American, Cambodian, Guamanian		

**URGENT CARE PLAN ON FILE**

**Start Date:** 2/15/2012  
CONCERNED ABOUT CLIENT HE FELL 3 DAYS AGO think he s self medicating and is taking too much please observe  
**Caution:** should not drive  
**Start Date:** 6/2/2012  
The quick brown fox jumped over the lazy sleeping dog.  
**Caution:**

**Guarantor Info**  
1) NON-RECOVERABLE Pol#

**Emergency Contact Info:** (Contact Type: G=Guardian; E=Emergency; K=Next of Kin) [View all Contacts](#)

Name	Type	Relationship / Contact Info:
Bull Mama	G E	Mother (h) 650-550-1212 (w) 650-573-2563 (c) 415-647-1942
Bull PAPA	G E K	Father (h) 415-123-1234 (w) 650-445-2266 (c) 650-456-4567
Bull Lotta		PCP (h) 416-555-1212
SHEETS - COUNTY PROBATION LORRIE	E	Parole/Probation Officer (w) 650-222-3333 (c) 650-333-2222
Testone Marla	G K	Daughter (h) 415-555-1212 (w) 408-555-1212 (c) 650-555-1212

**Authorization For Use of PHI**

Date	Person / Organization
6/2/2012	hello there testing
5/23/2012	ingall bull
5/16/2012	Jeannine
11/3/2011	TESTING123
8/3/2011	MICHELLE TREHAN
8/3/2011	ME
2/7/2011	ingall

**Assesmnt Status**

Adult Admission  
Status: Draft  
Date: 6/2/2012  
Completed By:  
LORRIE SHEETS

**Current Medications** (information is up to by 24 hours out-of-date. Please check Infoscriber for up-to-date medication profile) [Allergy Info](#)

Order Date	Refills	Drug / Dose / Prescriber / Pharmacy
6/2/2012	0	Valium ; - 10 mg, TAB, PO (1)ea BID Prescriber: Cabaj, Robert Pharmacy: Walgreens Drug Store 00063
4/6/2012	0	lithium ; - 300 mg, CAP, PO (1)ea BID Prescriber: Cabaj, Robert Pharmacy: Walgreens Drug Store 00063
1/18/2012	0	Adderall XR ; - 10 mg, ERC, PO (1)ea BID Prescriber: Cabaj, Robert Pharmacy: Walgreens Drug Store 00063

**Current Open Episodes / Primary Dx / Tx Plan Status** (as of 08/07/2012) [Other Assigned Staff](#) [Dx History](#) [Tx History](#) [Episode Hx](#) [Progress Notes](#) [ICI Notes](#)

EP	Admit	Program	Primary Clinician	Psychiatrist	Dx	Last Service	Tx Plan Status
37	11/10/2011	410405 FAIR OAKS INTERFACE	BULL,INGALL		309.81		Was Due 5/1/2012
36	10/6/2011	410401 SOUTH COUNTY ADULT	BULL,INGALL	SHEETS,LORRIE	305.20	6/2/2012	Draft 4/19/2012 - 5/1/2013
31	3/9/2011	007000 WESTWOOD MANOR	FRIEDMAN,MICHELE		799.9A		No Tx Plan Required
25	11/15/2010	410301 CENTRAL COUNTY ADULT	SHEETS,LORRIE		301.3	2/9/2012	Was Due 5/1/2012

**CA/LOCUS** **School Based Mental Health Info:**

**Date:** 5/31/2012 **26.5:** Yes **Date:** 11/9/2010  
**Score:** 7 **Closed Date:** 6/20/2012  
**0-6 Hours** **School District:** JEFFERSON ELEMENTARY

### C. Details of the 9 Main Sections and 7 Links (in blue) to More Information

- Client Demographics** - Includes information on the following: Client Name, Date of Birth, Age, Address, Phone Numbers, Race, Ethnicity, Language & Preferred Language, Gender, Social Security Number, CCP Coordinator, Anniversary Date, Living Situation, AKA Names, Treatment Consent Date (Avatar Consents only at this time.)



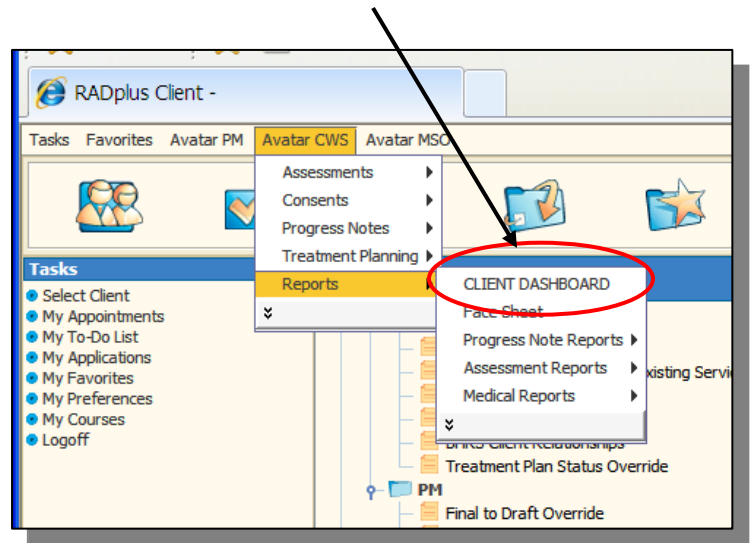
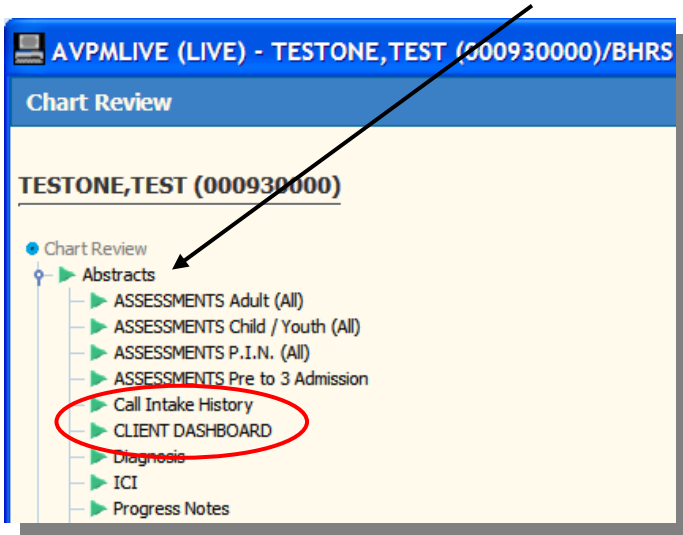


2. **Urgent Care Plan** - If a client has an Urgent Care Plan on file it will display in the upper right corner. (This report will only pull the *most recent*, open Urgent Care Plan.)
3. **Guarantor Information** - Shows the current payer information on file.
4. **Emergency Contact Information** - Displays information that has been entered in the Client Relationships form in Avatar. Individuals included have been flagged as one of the following: Guardian (**G**), Emergency Contact (**E**), and/or Next of Kin (**K**). In addition, it lists individuals who are designated as urgent contacts (e.g., Probation Officer, Primary Care Physician, etc...)
  - ▶ [View All Contacts](#) - This link will display all collateral contacts entered into Client Relationships. You can find Client Relationships at **Avatar PM/Client Management/Client Information**.
5. **Authorization For Use of PHI** - This section displays the current status of the consent form "Authorization for the Use of PHI." Consents for the last 18 months will display and items that are over a year old will display in **RED** to indicate that the consent has expired.
6. **Assessment Status** - Displays the current assessment status. If the client's assessment is almost due it will display in **GREEN** and assessments that are overdue or left in "Draft" will display in **RED**. (NOTE: **Documents left in draft are not considered complete, or part of the client record.**)
7. **Current Medications** - Displays currently prescribed medications from Infoscriber. Information includes the date prescribed, # of refills left, medication name, dosage, prescriber, and pharmacy (pharmacy phone number will be added later). Prescriptions that have been discontinued will not display in this section. (NOTE: **Infoscriber information can be up to 24 hours old.**)
  - ▶ [Allergy Info](#) - This link will display all medication and non-medication allergies that have been entered into Infoscriber.
8. **School Based Mental Health Information** - Displays current information regarding authorized School Based Mental Health services (formerly 26.5 Info.)
9. **Current Open Episodes/Primary Dx/Tx Plan Status** - This section displays information about the client's open episodes. Information for each episode includes episode number, admit date, program name, primary clinician, psychiatrist, primary diagnosis, last service date, and treatment plan status.
  - a. **Treatment Plan Information** - If the client's Treatment Plan for an episode is almost due, it will display in **GREEN**. Treatment Plans that are overdue or left in "Draft" will display in **RED**.
  - b. **Last Service Date** - Displays in **RED** if the last service occurred more than 90 days ago.
  - c. **Additional links in this section:**
    - i. [Other Assigned Staff](#) – Displays the names and roles of other staff who have this client on their caseloads and each staff member's program/team.
    - ii. [Dx History](#) - Displays the complete history of primary diagnoses by episode entered into Avatar.
    - iii. [Tx History](#) - Will display 90 days of service information by episode.



- iv. [Episode Hx](#) - Displays client's episode history since 7/1/2004. (Run time up to 1+ min.)
- v. [Progress Notes](#) - Displays 6 months of progress notes. (Run time up to more than 1 min.)

**D. Dashboard Report Locations** Abstracts Section of Chart Review and Avatar CWS/Reports

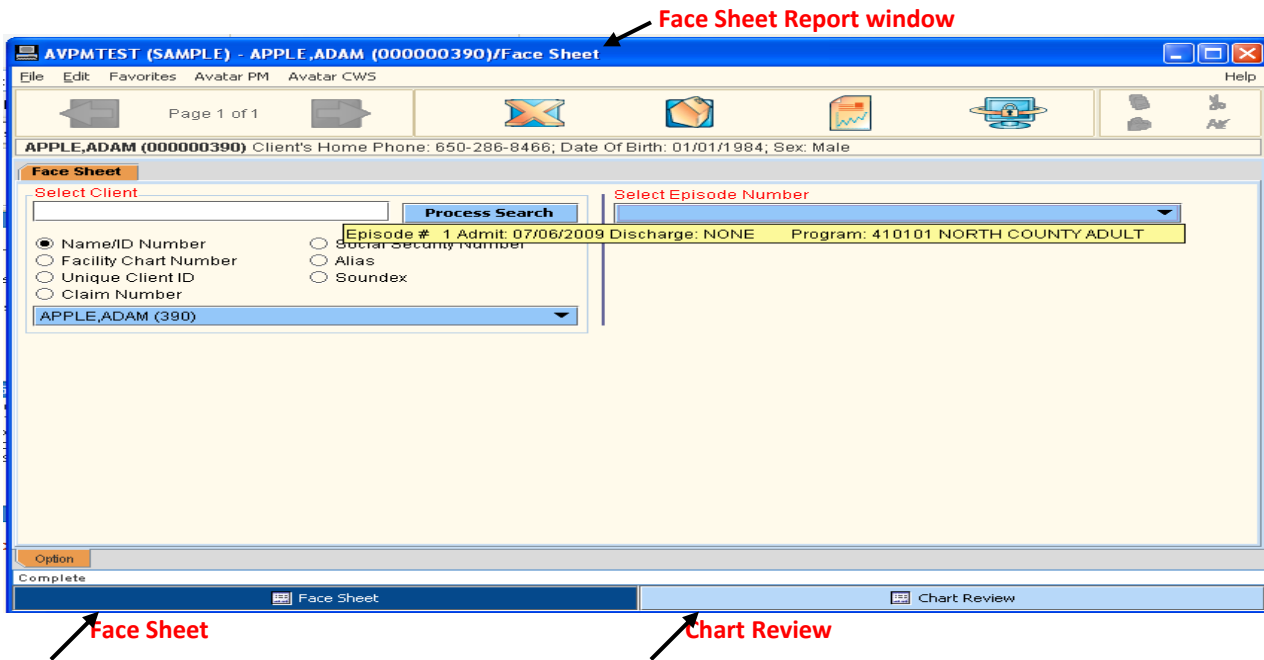




## Section 7: Chart Review

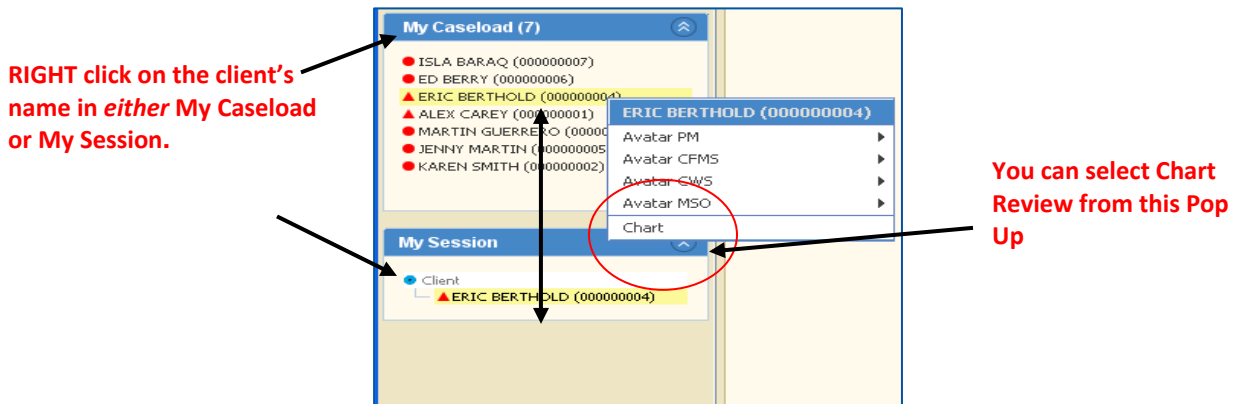
### A. How to Find the Chart Review Screen:

The blue title bar of the window below shows that this is the client's Face Sheet report window. On the bottom left section of the window is the Face Sheet and on the **bottom right in light blue is Chart Review**. When you click on Chart Review it becomes dark blue and is active. Chart Review will always appear at the bottom of any window you are working in. **Any report or form that you open will bring up the Chart Review screen.** You can switch between screens.



You can also Launch **Chart Review** as **stand alone function** without having to first open another option! The Menu Path is **CWS**→ **Reports**→ **Chart Review**. You can **also Right click on a client** either in **“My Caseload”** or **“My Session”** and select **Chart** for Chart Review.

From Chart Review, you can **exit** the screen by **clicking on Dismiss**.





## B. Information in the Chart Review Screen:

Chart Review shows a quick view of the client's entire chart. You can view episodes of treatment and ONLY finalized documents within the episodes.

\* **Abstracts:** These are reports that pull together information from multiple areas of the Avatar system. A report from Abstracts will include all information and companion documents. (Assessment includes MSE, Diagnosis, LOCUS, Substance Abuse Assessment if indicated- all will show for date selected.)

\* **Client Level Documents:** These are forms connected only to a client, not any particular program or episode, e.g. consents, LOCUS/CALOCUS, ICI's, Substance Use Assessment.

\* **Episodic Level Documents:** Episodes are displayed by episode number, admit and discharge dates, if the episode is open then NONE will show for the discharge date. Episodic documents include treatment plans, assessments, and diagnosis.

## Chart Review Screen

### ABSTRACTS

Abstracts are reports that pull together information from multiple areas of the system. We have added new assessment reports that will pull all of the assessments on file for a client in reverse chronological order. This will eliminate the need to search through the episodes for the assessments on file. These reports also include all of the information in the assessment and the companion documents.



**Chart Review**

**TESTONE,TEST (000930000)**

- Chart Review
  - Abstracts
  - To Do List
  - AIMS (Abnormal Involuntary Movement Scale)
  - BHRS Client Relationships
  - CALOCUS
  - Care Coordinator
  - CONSENTS Application for Services/Consent to Treatment
  - CONSENTS Authorization for use or Disclosure of PHI
  - Day Treatment Authorization Approval
  - ICI Contacts Note
  - Initial Contact Screening (ICI)
  - LOCUS
  - Substance Use Assessment
  - URGENT CARE PLAN
  - Episode # 38 Admit: 12/15/2011 Discharge: NONE Program: 417000 COASTSIDE ADULT
  - Episode # 37 Admit: 11/10/2011 Discharge: NONE Program: 410405 FAIR OAKS INTERFACE
  - Episode # 36 Admit: 10/06/2011 Discharge: NONE Program: 410401 SOUTH COUNTY ADULT
  - Episode # 35 Admit: 04/30/2011 Discharge: 05/06/2011 Program: 410205 PENINSULA HOSPITAL INPATIENT

**CLIENT LEVEL**

Client Level forms are not associated with any particular program or episode; they are connected only to the client. These forms include consents, LOCUS or CALOCUS, ICI's, Substance Use Assessment, and others.

- Episode # 26 Admit: 11/15/2010 Discharge: 05/26/2011 Program: 411100 YOUTH SERVICES CENTER
- Episode # 25 Admit: 11/15/2010 Discharge: NONE Program: 410301 CENTRAL COUNTY ADULT
  - ADULT Admission Assessment
  - ADULT Annual / Update Assessment
  - ADULT Special Assessment
  - BHRS Client Treatment and Recovery Plan
  - BHRS Diagnosis
  - CHILD / YOUTH Admission Assessment
  - CHILD / YOUTH Annual / Update Assessment
  - CHILD / YOUTH Special Assessment
  - Contractor Treatment Plan
  - Diagnosis
  - Managed Care Authorizations
  - Medication Reconciliation
  - PRE TO 3 Admission Assessment
  - Progress Note Viewer
  - Transfer/Discharge Request
- Episode # 24 Admit: 11/15/2010 Discharge: NONE Program: 410101 NORTH COUNTY ADULT
- Episode # 23 Admit: 10/07/2010 Discharge: NONE Program: 410311 YOUTH TRANSITION SERVICES

**EPISODE LEVEL**

Episode level documents include Treatment Plans, Assessments, Diagnosis and others

**C. How to Open and View Chart Review Documents:**

- A Green triangle by a document means there is **more information**.
- A small circle, means there is **no** information.
- Clinical documents now have “print ready” reports associated with them.

You must go to Section 9 for instructions about the Avatar Clinical Document Viewer so you can search for and view scanned documents.



## Section 8: The Face Sheet Report

**A** Report Submit Icon

**B** Client

**C** Episode

AVPMTEST (SAMPLE) - APPLE,ADAM (000000390)/Face Sheet

Page 1 of 1

APPLE,ADAM (000000390) Client's Home Phone: 650-286-8466; Date Of Birth: 01/01/1984; Sex: Male

**Face Sheet**

Select Client

Process Search

Select Episode Number

Episode # 1 Admit: 07/06/2009 Discharge: NONE Program: 410101 NORTH COUNTY ADULT

Name/ID Number  Social Security Number  
 Facility Chart Number  Alias  
 Unique Client ID   
 Claim Number  Soundex

APPLE,ADAM (390)

Option

Complete

Face Sheet Chart Review

**A. PATH:** Avatar CWS ↓ Reports → Face Sheet, click

You can see that this report requires the Client Name (**B**) and Episode (**C**) to be entered. You will then go to the Report Submit icon (**A**) in the toolbar and click.

**B. Details of the Face Sheet Report:** The Face Sheet Report opens to the Preview Screen tab.

**Preview Tab** This top portion includes demographic information, language, therapist, and diagnosis

Face\_Sheet.rpt

100%

1 of 1+

powered by crystal

Preview

San Mateo County BHRS  
FACE SHEET

Client/Episode: - 390 - 1      SS #:      Pseudo SS #:      Sex: Male      DOB: 1/1/1984  
Family Number:

Name: APPLE,ADAM	Home Phone #: 650-286-8466	Language: English
AKA 1 : DOUBLE A	Work Phone #:	Preferred Language: English
AKA 2 :	Cell Phone #:	Parent's Language: English
Age: 25		Years Education: No Entry
Address: 714 ORCHARD LANE SAN MATEO, CALIFORNIA, 94401	CCP Coordinator:	

Admit Date: 7/6/2009	MOS:	Admit GAF:	Group 1:	Group 2:	Group 3:
Provider: 410101 NORTH COUNTY			Assigned Therapist: BECHER,MATT		
Diagnosis Effective Date: 10/7/2009			Doctor:		
Primary Dx: 100.D - TRAUMATIC STRESS DISORDER					
Secondary Dx:					
Conservatorship/Court Status: No Entry					



The bottom portion of the Face Sheet Report includes the name of the coordinator, 26.5 eligibility, guarantor information, emergency contacts, and client relationships.

Notice of PP: <b>Temporarily Unavailable</b> Consent to Tx: <b>Temporarily Unavailable</b> Initial Assessment: 06/15/2011 CCP Coordinator: MEALEY, JEANNINE CCP Intake Date: 11/15/2010 Anniversary Date: 05/01	<b>Guarantor Name:</b> NON-RECOVERABLE	<b>Rank: Policy #:</b> 1																									
<b>26.5: Yes</b> School District: BRISBANE ELEMENTARY Contact Info:	<b>26.5 Eligibility Date:</b> 11/9/2010	<b>Next IEP Due:</b> 11/9/2011 <b>Closed Date:</b> 6/26/2012																									
<table border="1"> <thead> <tr> <th>Name</th> <th>Relationship:</th> <th>Guardian</th> <th>Next of Kin</th> <th>Emerg. Contact</th> </tr> </thead> <tbody> <tr> <td>LORRIE SHEETS - COUNTY PROBATION</td> <td>Parole/Probation Officer (w) 650-222-3333 (c) 650-333-2222</td> <td>No</td> <td>No</td> <td>Yes</td> </tr> <tr> <td>Mama Bull</td> <td>Mother (h) 650-550-1212 (w) 650-573-2563 (c) 415-647-1942</td> <td>Yes</td> <td></td> <td>Yes</td> </tr> <tr> <td>PAPA Bull</td> <td>Father (h) 415-123-1234 (w) 650-445-2266 (c) 650-456-4567</td> <td>Yes</td> <td>Yes</td> <td>Yes</td> </tr> <tr> <td>Marla Testone</td> <td>Daughter (h) 415-555-1212 (w) 408-555-1212 (c) 650-555-1212</td> <td>Yes</td> <td>Yes</td> <td>No</td> </tr> </tbody> </table>	Name	Relationship:	Guardian	Next of Kin	Emerg. Contact	LORRIE SHEETS - COUNTY PROBATION	Parole/Probation Officer (w) 650-222-3333 (c) 650-333-2222	No	No	Yes	Mama Bull	Mother (h) 650-550-1212 (w) 650-573-2563 (c) 415-647-1942	Yes		Yes	PAPA Bull	Father (h) 415-123-1234 (w) 650-445-2266 (c) 650-456-4567	Yes	Yes	Yes	Marla Testone	Daughter (h) 415-555-1212 (w) 408-555-1212 (c) 650-555-1212	Yes	Yes	No		
Name	Relationship:	Guardian	Next of Kin	Emerg. Contact																							
LORRIE SHEETS - COUNTY PROBATION	Parole/Probation Officer (w) 650-222-3333 (c) 650-333-2222	No	No	Yes																							
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PAPA Bull	Father (h) 415-123-1234 (w) 650-445-2266 (c) 650-456-4567	Yes	Yes	Yes																							
Marla Testone	Daughter (h) 415-555-1212 (w) 408-555-1212 (c) 650-555-1212	Yes	Yes	No																							

### C. Episode Data Drill Down Reports:

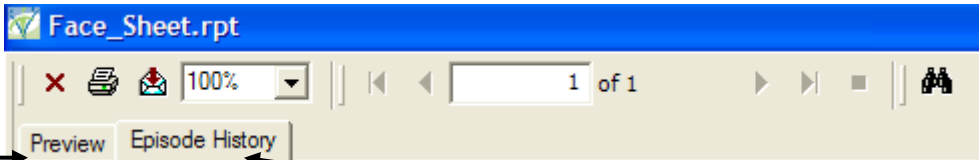
**⚠ MOST IMPORTANT for Look-Up Users is the Episode Data Drill Down at the very bottom of the Face Sheet. Data Drill Down categories are highlighted in blue and when you click on a link a report is generated which will open a new tab on the face sheet screen, next to the Preview tab.**

#### Episode Data Drill Down

- [Episode History](#)    
 [Diagnosis History](#)    
 [Treatment History](#)    
 [Client Relationships](#)  
[Demographic History](#)    
 [Psychiatrist History](#)    
 [Progress Notes \(Last 6 Months\)](#)    
 [Medication History](#)

#### Details of the Episode Data Drill Down:



- Episode History: Shows all episodes, open and closed, better to view from CHART REVIEW, Section 7, pages 28-29 or Section 9, page 33.
- Demographic History: Shows past and current demographic status.
- Diagnosis History: Shows entry date, which person entered, diagnosis, principal diagnosis and diagnosing practitioner.
- Psychiatrist History: Shows date assigned, practitioner type, practitioner name, date entered and who entered.
- Treatment History: Shows service date, service type/code, practitioner, practitioner ID, duration, location.
- Progress Notes: **(Last 6 Months):** Shows progress notes for past 6 months *across episodes*.
- Client Relationships: Shows contacts, next of kin, if releases are on file.
- Medication History: Shows order date, drug and dose, prescriber, pharmacy, refills, when Rx ends, instructions; **may be out of date by 24 hrs, better to check Info-Scriber Report.**



**D. View Reports from Episode Data Drill Down:**

To view a report, click on a link, the report will process and then open, you will also notice a new tab opens next to the Preview tab. The Episode History link was selected and here is the tab.

**The Preview tab will bring you back to the full view of the Face Sheet where you can *close the report* or *select another drill down link*.**

**E.  IMPORTANT:** Use **ONLY** the Preview tab to access other Data Drill Down reports. If the  is used, you will be kicked out and will need to re-order the Face Sheet Report! **GO TO PREVIEW TAB!**

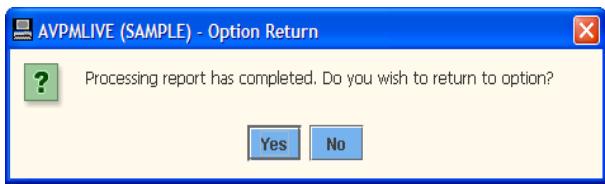
You can print information from the Episode Data Drill Down screens but **NEVER** consider the information to be appropriate for a legal release of information.

**For legal releases you MUST select and print documents from the specific Avatar report menu. (Progress Note Report, Assessment Report, etc)**



**F. Closing the Face Sheet Report:**

When you are ready to close the Preview screen of Face Sheet Report, you *can* close Crystal Reports with the .

When you close the Crystal Report window, the following message appears.



Always click "Yes"

Click the Close button in the upper-right corner of the Face Sheet window to exit the **report** . Then you will be at the screen where you first requested the Face Sheet report and you can close this window if you click the  Close icon.





## Section 9: Scanned Documents

### A. Viewing Scanned Documents

Avatar allows any authorized user to search for, view and print scanned documents.

### B. Understanding the Clinical Document Viewer Window

- **Path:** Avatar CWS → Document Management → Clinical Document Viewer
- **Access:** Any BHRS staff member can access Clinical Document Viewer. However, some documents, such as HIV status, are restricted to certain staff only.

Clinical Document Viewer has 2 tabs; Tab 1 Search: You will Select the Search Criteria

The screenshot shows the 'AVPMTEST (SAMPLE) - Clinical Document Viewer' window. The 'Search' tab is active. Annotations are as follows:

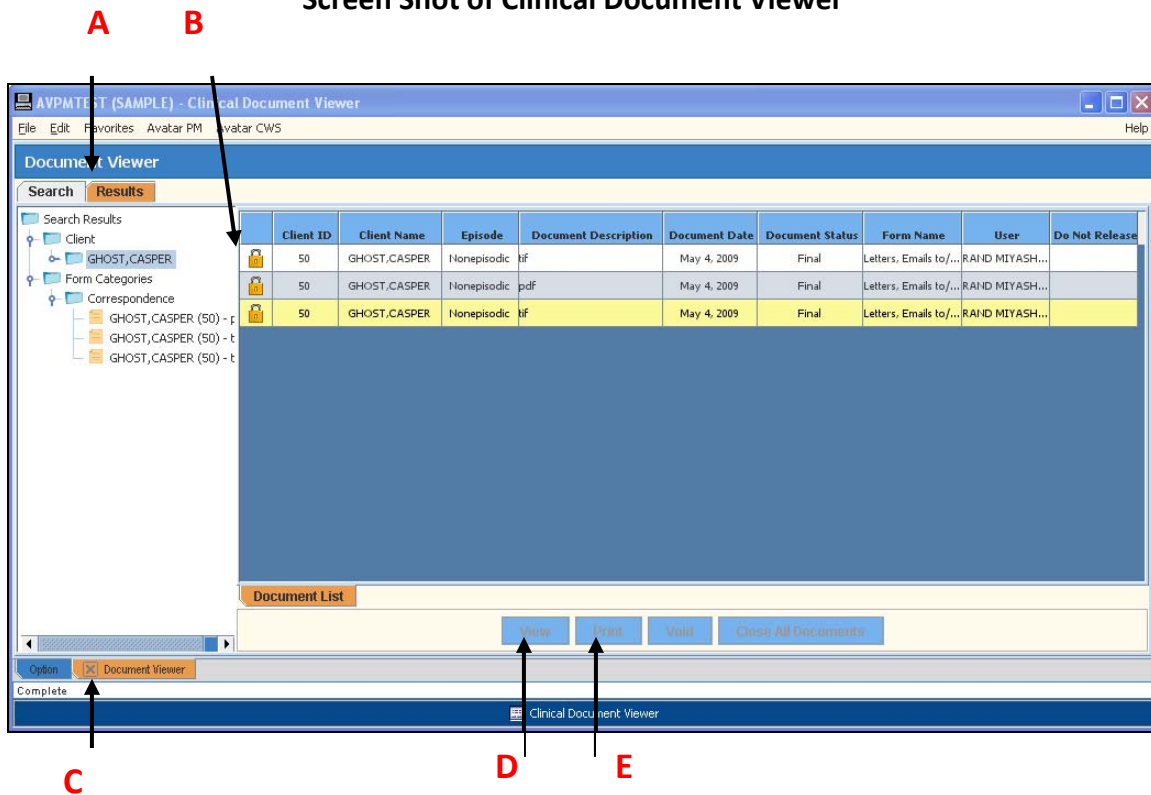
- A:** Points to the 'Search' tab.
- B:** Points to the 'Select Type:' dropdown menu, which is set to 'Client'.
- C:** Points to the 'Select All or Individual Client:' radio buttons, with 'Individual' selected.
- D:** Points to the 'Select Client:' dropdown menu, which shows a list of clients including 'APPLE, ADAM (390)' and 'APPLE, PEAR B (255)'.
- E:** Points to the 'Episode:' dropdown menu, which is set to 'All'.
- F:** Points to the 'Form Selection' section, where 'Entire Chart' is selected.
- G:** Points to the 'Close' button at the bottom right of the window.

- **Search Tab: (A)**
  - **Select Type of Search:** Select Client for documents related to this client or Staff for documents scanned by specific staff. (B) Then Select All (scanned by all staff) or Individual Client (C).



- **Select Client:** Enter a few letters of the client's name, if more than one name appears click to make it populate the select client field **(D)**.
  - **Episode:** Select a specific episode or to see all documents for this client, **select ALL (E)**.
  - **Form Selection:** You can search for a document by Entire chart, legal Medical Record or by Categories/Forms **(F)**.
  - **Click Process (G)**.
- **Results Tab: (A)**
    - **Lock icon (B):** Document is restricted and not available to view or print.
    - **Document Viewer Tab (C):** Bottom left - brings you back to the search screen; you can perform another search or click the close icon to exit and return to the Avatar homepage.
    - **View button (D):** You can view the scanned document on your screen
    - **Print (E):** You can print a paper copy of the scanned document; some restricted documents can be viewed but not printed.

Screen Shot of Clinical Document Viewer





## **Section 10: Urgent Care Bundle (Urgent Care Plan and Client Alerts)**

As a Look-Up User you may have a need to create a client alert about a special problem or concern that you have encountered.

You want other users to be aware of the situation when they open or view the client's electronic medical record.

### **A. Client Alerts:**

Client Alerts are similar to Post It Notes that have been used on a paper chart. The Client Alert is a way users can view important information or issues that need attention. The alert may be set by any Avatar user; once created there will be a pop up window that contains the alert message, for example, "**Client enrolled in Total Wellness**".

The Client Alert pop up window will appear upon opening any document or report. A Client Alert can display for certain periods of time, such as a week or months. Client Alerts do not end until they are disabled.

Client Alerts may be simple and non clinical statements or requests, for example, "Client is GPO" or "Update client demographics". Other Client Alerts are clinical concerns that may be urgent and require the development of an Urgent Care Plan (high priority).

It would be inappropriate for the Client Alert pop up window to contain the sensitive client information regarding the specific clinical risk, concern and/or instructions as Avatar screens may be seen by a client/guardian who is present when the clinician is working in Avatar. The Care Message or Care Alert type of Client Alert will actually direct a user to the Urgent Care Plan to view this sensitive information. The clinician may want other practitioners to know of the concern but not the client/guardian.

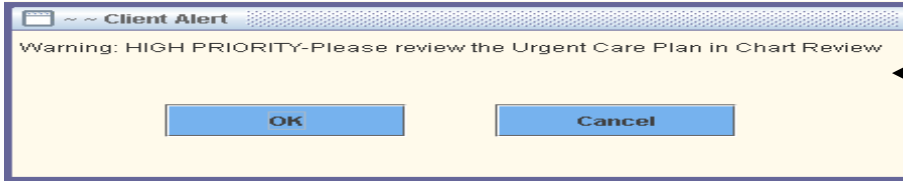
The **Care Message** or **Care Alert** is usually enabled by Clinicians.

**1. Care Message:** Includes a routine concern or information about the client that other clinicians should be aware of, for example, "the client is refusing to take meds". This message will not show in the Care Message Alert pop up window. The Care Message pop up window includes this direction: "**Please Review Urgent Care Plan for Information**". The Urgent Care Plan describes the alert information/concern and may include instructions regarding what needs to be done.

**2. The Care Alert:** Includes information about a more urgent concern or safety issue, for example, "monitor client as danger to other". The Care Alert pop up window includes this direction: "**High Priority- Please Review Urgent Care Plan in Chart Review**" The clinician will view the Urgent Care Plan as soon as possible and without the client/guardian viewing!



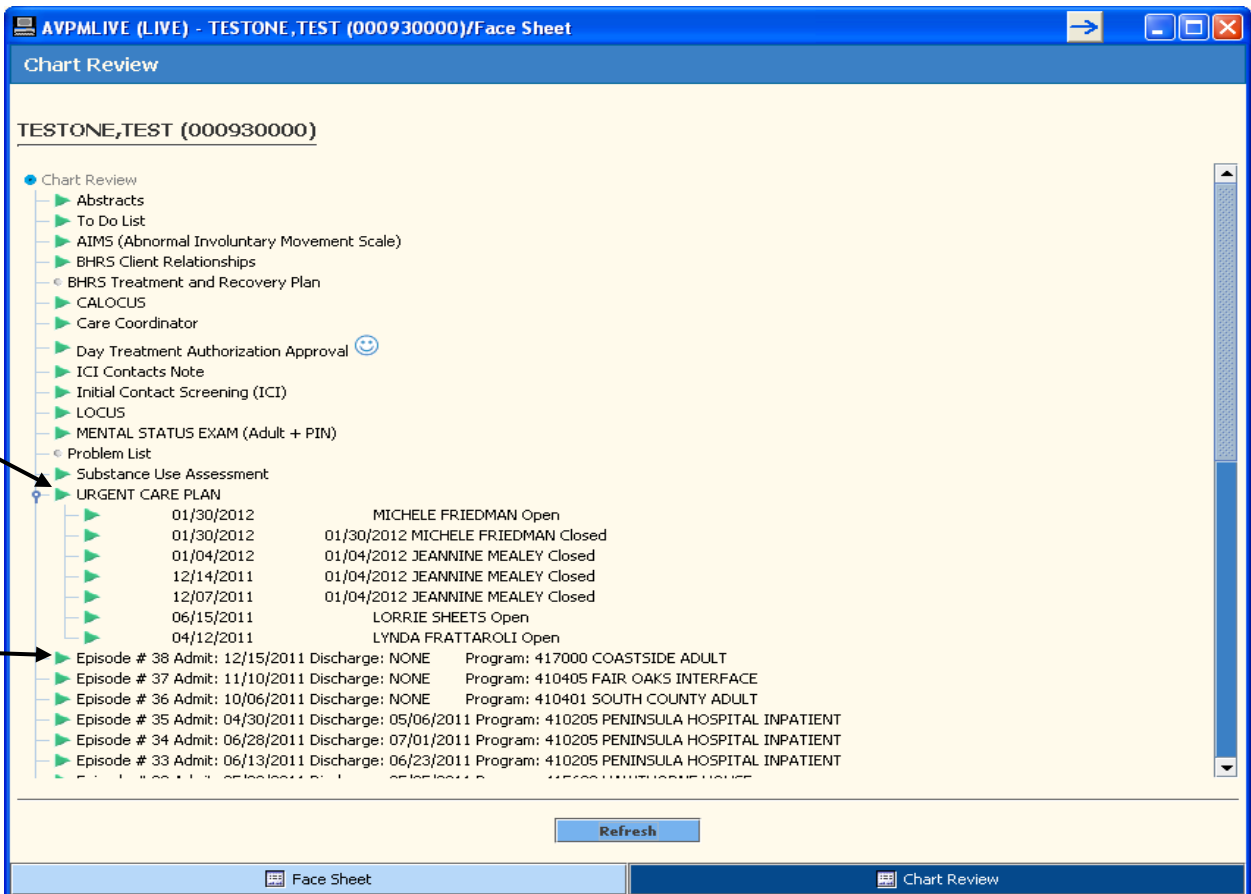
### 3. Example of Client Alert Pop Up Window



Example of Care Alert pop up Warning - Click OK, then go to Chart Review screen!

### B. How to View the Urgent Care Plan: (as directed by the Care Alert or Care Message pop up window)

- The Urgent Care Plan is located **above the latest episode (A)** in the Chart Review screen.
- The Urgent Care Plan is listed by date with the **most current date at the top**. Click on the **green arrow (B)** to view and read the Urgent Care Plan.





### Example of an Urgent Care Plan

AVPMLIVE (LIVE) - TESTONE,TEST (000930000)/BHRS Outpatient Progress Note

Report: 01/31/2012 MICHELE FRIEDMAN Open

Report Date: 01/31/2012 Page 1 of 1

SAN MATEO COUNTY  
BEHAVIORAL HEALTH & RECOVERY SERVICES  
URGENT CARE PLAN Inquiry

Urgent Care Plan  
Start Date: 01/31/2012  
Status: Open  
Date of Birth: 05/08/1962  
Primary Diagnosis: MAJOR DEPRESSIVE DISORDER, SINGLE EPISODE, SEVERE WITH PSYCHOTIC FEATURES (296.24)  
Therapist/Caseworker: FRIEDMAN,MICHELE (053396)

Urgent Care Treatment Plan:  
Client is possible danger to others. He has been hostile, aggressive and argumentative with others. Becomes agitated and has threatened vague harm to others on one occasion

Caution:  
client has not taken his meds for 1 week and is at risk.

View Search PDF Config PDF Viewer

Page: 1 of 1 100%

<< Prev Next >> Current Page File Print Dismiss

BHRS Outpatient Progress Note Chart Review Report: 01/31/2012



## C. Create a Client Alert and Urgent Care Plan

### 1. CLIENT ALERT

- Select the client.
- **PATH:** Avatar CWS → Other Chart Entry → Urgent Care Plan Bundle
- The bundle will open to the document to create a Client Alert; if other alerts have been made, there will be a **Pre-Display Screen** that **shows the other Client Alerts** that have been created.
- The **Client Alerts Pre-Display screen** includes: the **Description** or **Alert Type**, the **Custom Message**, the **Date of Entry** and if the **Alert is Enabled/Active** or **Disabled/Closed**.
- At the bottom of this screen there are options for you to select:
  - **ADD** is to add a **new Client Alert**.
  - **EDIT** is to **edit an alert that is active** and/or to **disable an active alert**.
  - **DELETE** is to delete an Alert.
  - **CANCEL** will cancel this option and return you to the homepage.

### Client Alert Pre-Display Screen

Alert Type	Description	Custom Message	Date Of Entry	Disabled
		Client repeatedly asks for benzos, CON...	03/08/2010	Yes
		client AWOL from Board and Care if pre...	03/03/2010	No
		This is a test Warning message.	03/08/2010	Yes

Select **ADD**; the Client Alert document will open



### How to Complete the Client Alert: Screen Shot Tab 1, Client Alerts,

The Client Alert document has 1 tab (A) and 1 page (B); Select the Type of Alert (C)

- |                            |                                    |                               |
|----------------------------|------------------------------------|-------------------------------|
| Assignment of Benefits Due | Financial Interview Due            | Stop do not link to episode 1 |
| Care Alert                 | GPO                                | Total Wellness                |
| Care Message               | insurance Application              | UMDAP Financial Due           |
| Client is Deceased         | Stop do not link this episode      | Update client demographics    |
| Error (custom)             | Stop do not link to episode 1 or 2 | Warning (custom)              |

- The Alert will fill in the **custom message (D)** box if custom is not a selection. *Do NOT select custom error as it will lock you out of all functions and you will need to call the help desk.* If Warning is selected then there must be an entry in the custom warning in the custom message box (red/required).
- Select **Active** or **Active for a Date Range**: If Active (E) is selected you will be *unable to make an entry for the start and end date.* The warning remains active until a status changes.
- If **Active for Date Range (F)** is selected, the **Start Date (G)** and **End Date (H)** will automatically be entered with today's date. The **End Date (H) can be changed manually for however long you set it.**
- **Disabled: (I)** this is *how you close an active alert that has no end date.*
- **Applicable Options: (J)** allows you to *set how the Alert will appear. Select All options.*
- **Episodes: (K)** allows you to select *which episodes will be impacted* by the Alert.
- **Submit: (L)** you will know the Alert has been set once you reopen Avatar. The pop up will appear and require you to click OK.

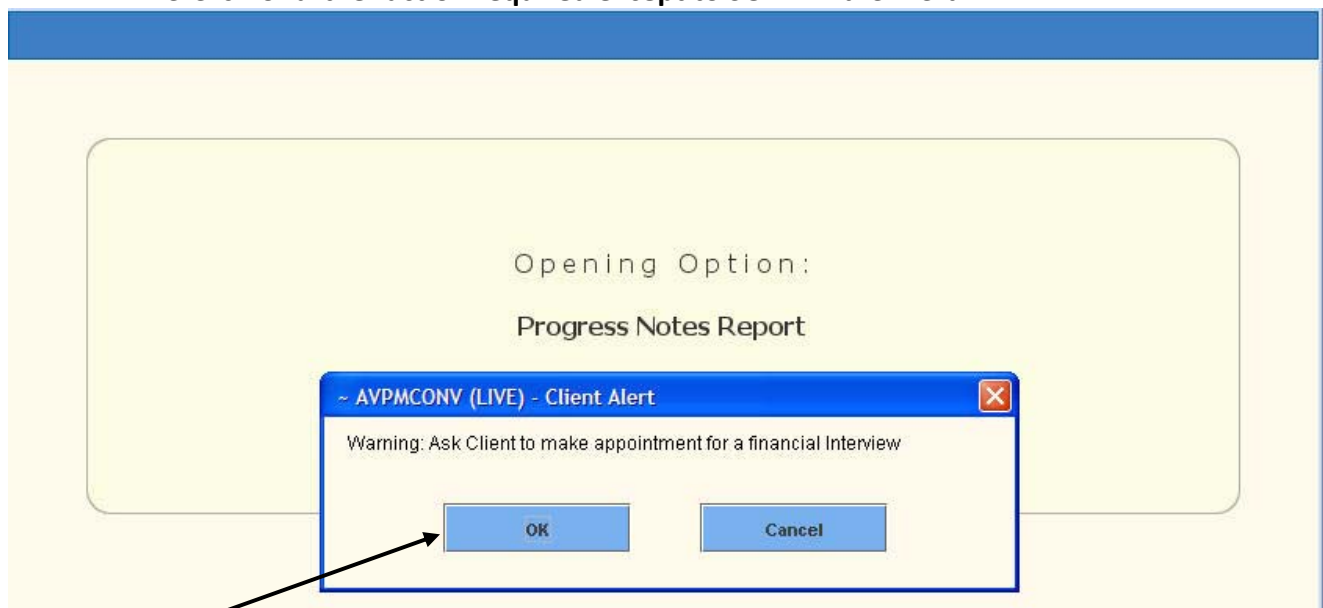
The screenshot shows the Avatar Client Alerts form for patient TESTONE, TEST (000930000). The form includes the following fields and options:

- A:** Tab label "Client Alerts"
- B:** Page indicator "Page 1 of 1"
- C:** "Type Of Alert" dropdown menu set to "CARE ALERT"
- D:** "Custom Message" text area containing "HIGH PRIORITY-Please review the Urgent Care Plan in Chart Review"
- E:** "Active or Active for Date Range" radio buttons, with "Active" selected
- F:** "Start Date" field set to 1/30/2012
- G:** "End Date" field set to 01/30/2012
- H:** "Disabled" radio buttons, with "No" selected
- I:** "Applicable Options" list with "All Options" checked
- J:** "Episode(s)" list with "All Episodes" checked
- K:** "Option" button at the bottom of the form



1. Example of a **simple Client Alert** that **does not** require an Urgent Care Plan:

- Select Financial Interview Due from the description or alert type drop down options.
- The Custom Message Box will fill in automatically with “Ask Client to Make Appointment for a Financial Interview”.
- Active for Date Range will fill in automatically.
- Disabled Defaults to No; select “YES” to close an active Alert or an Alert that had no End Date.
- The Start Date and End Date are filled in automatically with today’s date.
- You can change the End Date manually for however long you want the Alert set for.
- The fields Applicable Options and Episodes are pre-set to ALL.
- There is **no further action required except to SUBMIT** the Alert.



\* When any document or report in Avatar is opened, this alert will pop up. Click OK.

2. Example of a **Care Alert that REQUIRES an Urgent Care Plan**:

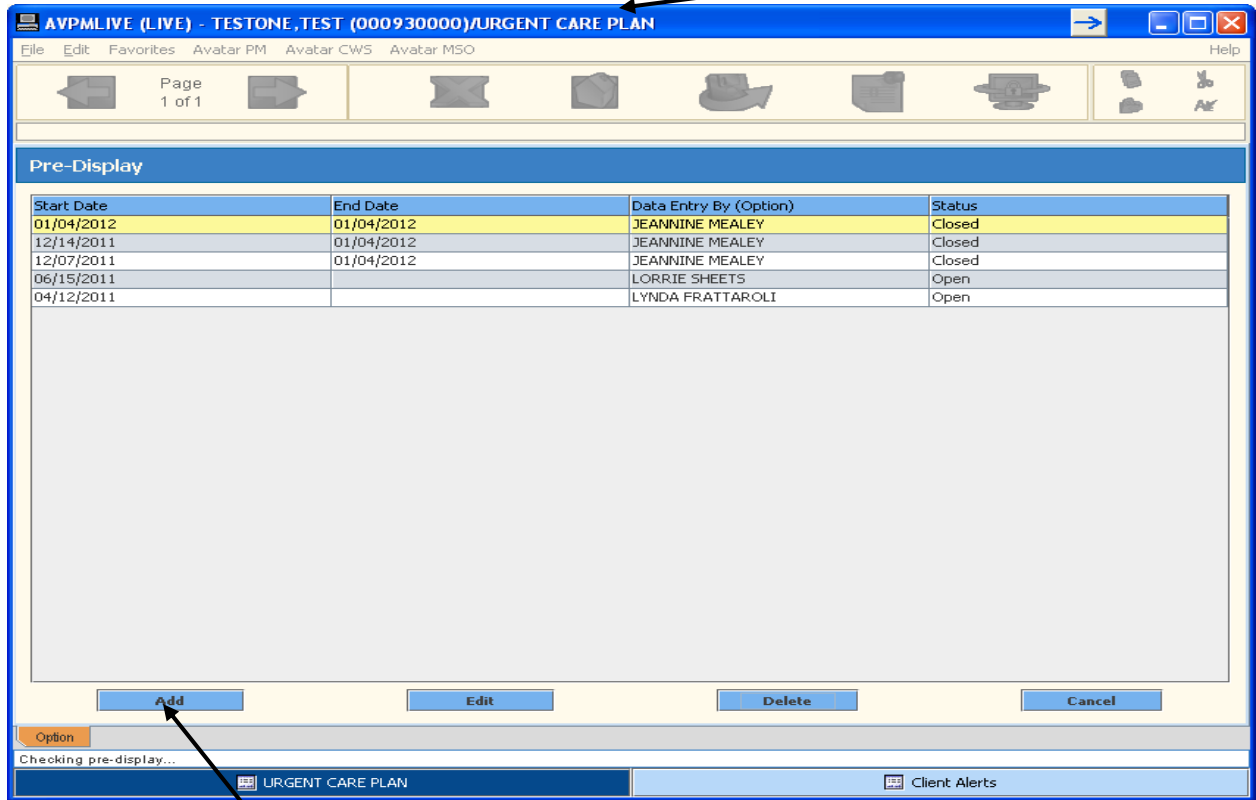
- Select: **Care Alert**.
- The Custom Message Box fills in automatically:  
    **“HIGH PRIORITY- Please Review the Urgent Care Plan in Chart Review”**.
- Active automatically is filled in; Disabled Defaults to No.
- Select “YES” to close an active Care Alert.
- The fields Applicable Options and Episodes are pre-set to ALL.
- SUBMIT.





## D. Urgent Care Plan

\* Once the Care Alert has been submitted, the Urgent Care Plan screen will automatically pop up with the Urgent Care Plan document or if there have been other Urgent Care Plans, an Urgent Care Plan *Pre-Display* screen will appear.



- The **Urgent Care Plan Pre-Display** screen displays **Start Date, End Date, Data Entry By** and **Status of the plan as Open or Closed**
- At the bottom of the screen are options for you to select:
  - ADD** is to add a **NEW Urgent Care Plan**.
  - EDIT** is to **edit an Active Urgent Care Plan** or **change the STATUS** and **CLOSE** an Urgent Care Plan.
  - DELETE** is to delete an urgent care plan.
  - CANCEL** is to cancel this option and return you to the homepage.
- **Select ADD**



The URGENT CARE PLAN contains 1 Tab (A), 2 pages (B) (C). Screen Shot of Urgent Care Plan Page 1:

**Identifying Information**

**Page 1: (B) Identifying Information.**

- Entry fields on the left side of the form are red/required fields.
- Start Date: (D) Date of Birth (F) and Primary Diagnosis (I) will automatically fill in.
- Select Status: (E) Status will default to Open; Select CLOSED to close an Urgent Care Plan that has been open.
- **Therapist/Caseworker:** (G) A process search entry, enter letters of the last name or entire last name of person in the white box, click process search, select the correct Therapist/Caseworker so that the name populates the blue box.
- The right hand side of the Urgent Care Plan includes **entry boxes that are optional.**
- **End Date:** (H) You can enter a date or leave this blank.
- **Diagnosis:** (I) This **fills in automatically**, you can update the diagnosis if needed by entering the code in the white primary diagnosis box, click process search, then select the correct diagnosis so that it appears in the blue box. If you update the diagnosis, the next box, psychiatrist, will become a red required field to enter who updated the diagnosis
- **Psychiatrist:** (J) Optional process search type entry, enter psychiatrist if diagnosis was updated per above
- **Region (K):** You can select the region from the drop down.



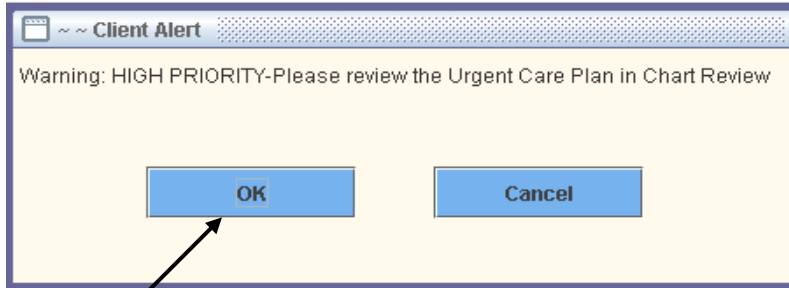
### Screen Shot: Urgent Care Plan Page 2: Treatment Plan and Caution (A).

#### Page 2: Treatment Plan and Caution (A)

- **Urgent Care Treatment Plan: (B)** This is a free text box for a narrative description of the concern.
- **Text Editor: (C)** This provides an expanded view of the text and spell check.
- **Caution: (D)** This is an optional free text box to include cautions.
- **Submit: (E)** Submits the Urgent Care Plan.



Once the Urgent Care Plan and Alert have been completed and submitted, the warning pop up ALERT will appear with any document or report that is opened. The pop up screen will warn users: **“HIGH PRIORITY - Please Review the Urgent Care Plan in Chart Review.”**



Click ok to this message AND  
**BE SURE TO VIEW THE URGENT CARE PLAN THROUGH THE CHART REVIEW SCREEN!**

### 3. How to VIEW the Urgent Care Plan

The Urgent Care Plan is viewed through the Chart Review screen. You must open any document or report in order to get to the Chart Review window. Please see page 33

#### **IMPORTANT: Close/Disable Urgent Care Plan**

- Always remember to **Close an Urgent Care Plan** and/or **Disable a Client Alert.**
- Select Stop or Dismiss and that will get you out of that screen.
- To Deactivate or Disable Urgent Care Plan or Care Alert, **SELECT the Urgent Care BUNDLE.**
- **Select EDIT: Change Status to CLOSE; enter today's date.**



## Section 11: Appendices

### 1. Select Client Screen

To add a client to the My Session Frame, you must use the Select Client command from either the Tasks Frame or Task Bar or Picture Icon.

The screen shot below shows Select Client is highlighted in blue, in the upper left. The Select Client screen requires an entry in the Client Name/ID# field. Enter the client name with last name first, followed by a comma (no space), and then the first name. Use the following examples as a guide when entering client names:

- LAST,FIRST
- LAST,FIRST JR (type a space before the title)
- LAST,FIRST MI (type a space before the middle initial)
- ID# - This number refers to the client’s Medical Record Number, also known as MR # or Client ID. If you know the number, you can type it here

You can use hyphens for names such as MARIA LOPEZ-CANTERA. You can use an apostrophe for names such as ANGELO D’MARCO.

Once the client name is entered, click on the blue Select Client ID Search, the client’s name will appear in the Select Client box below. Sometimes more than one client pops up with the same last name and you will need to narrow down your search.

**The new Avatar 2010, Select Client Screen:** This screen has a *different look*; **client search results** now show in the **bottom half of the screen**; alternative look-up is still there. The **Up** and **down** arrows on the keyboard can be used to scroll through names and the **Enter** key can be used to highlight a row.

Annotations in the screenshot:

- Here's the Alternative Look Up Search (points to the Alternate Lookup field)
- Enter Key will highlight the row (points to the highlighted search result row)



You can narrow your search for a client by trying any of these **alternative look-up methods**:

Item	Description
Social Security Number	Search for client by social security number.
Facility Chart Number	This is the SMMH MR#. The latest entries are from December, 2009. This list is not currently kept up to date.
Alias	Search for a client by alias. If possible aliases are entered in Avatar in this format:  LASTNAME,ALIAS
Unique Client ID	BHRS does not use this item.
Soundex	Search for client with similar sounding names. For example, if you enter <i>Brown</i> , Soundex would also locate clients named <i>Browne</i> .
Client Name Shortcut	If you are not sure how to spell a client's name, you can use shortcuts to display a list of clients to choose from. For example, you can type <i>S,J</i> for all clients whose last names begin with S and first names starts with J, or type <i>SM</i> to see all clients whose last name begins with <i>SM</i> .

**Client Name  
Shortcut**

Select Client		
Client Name/ID#		
S,J		
Select Client Name/ID# Search		
Select Client		
SMITH,JOHN (000000219)	12/12/1912	Male
SMITH,JOHN (000000219)	12/12/1912	Male
SMITH,JOHN (000000327)		
SMITH,JOHN (000000338)		Male
SMITH,JOHN (P63)		



## 2. Favorites

Task	Procedure
Add Commands to My Favorites	<ol style="list-style-type: none"> <li>1. Choose Help→Search for Option from the Menu Frame. <i>The Option Search screen appears.</i></li> <li>2. In the Enter Text to Find in Option Name field, type the text string you are searching for.</li> <li>3. Click the Search button.</li> <li>4. Click the row in the results table for the command you want to add to My Favorites.</li> <li>5. Click the Add to Favorites button at the bottom of the screen. <i>The Add Favorite window appears.</i></li> <li>6. Click OK.</li> <li>7. Repeat steps 2–5 to add more commands to your favorites.</li> <li>8. When you are finished adding commands to your favorites, click the Dismiss button at the bottom of the Option Search screen.</li> </ol>
Organizing My Favorites into Folders	<ol style="list-style-type: none"> <li>1. Click the My Favorites link in the Tasks Frame on the left side of the Avatar Homepage.</li> <li>2. Right-click the Favorites folder icon and choose Add Folder from the popup menu. <i>The Input dialog box appears.</i></li> <li>3. Type the name of the new folder and click OK.</li> <li>4. Place the mouse pointer over the favorite you want to add to the new folder.</li> <li>5. Click and drag the favorite just below the new folder and then release the mouse button.</li> <li>6. Repeat step 5 for each favorite you want to place in the folder. <i>The folder has a small icon in front of it. Clicking that icon expands and collapses the contents of the folder.</i></li> <li>7. Click the Save button at the bottom of the My Favorites screen. <i>If you right-click a client name in the My Caseload Frame or the My Session Frame, you will now see a Favorites command in the popup menu, which you can use to access your favorites if you wish.</i></li> </ol>

### Commonly Used Favorites for Look-Up Users:

- Client Dashboard
- Chart Review
- Urgent Care Plan Bundle - includes Client Alerts



### 3. Using Shortcuts

The following table displays several shortcuts you can use in navigating through Avatar windows.

Keyboard Shortcut	Action
[Ctrl]+[E]	Exits window without submitting
[Ctrl]+[S]	Submits (saves) window
[Page Down]	Moves one page forward on current tab
[Page Up]	Moves one page back on current tab
[Ctrl]+[Page Down]	Moves one tab forward on current window
[Ctrl]+[Page Up]	Moves one tab back on current window
[F6]	Move from tab to tab within a window
[Enter]	Same as clicking OK or Yes
[F5]	Clears the selected value from a dropdown field
Arrow Keys	Arrow through dropdown menu to select command
[Tab]	Move forward one field
[Shift]+[Tab]	Move backward one field
[Spacebar]	Selects radio button option if your cursor is on it.

Keyboard Shortcuts for Text Fields	Action
[Home]	Moves cursor to the beginning of text in a field
[End]	Moves cursor to the end of text in a field
[Ctrl]+[Home]	Moves the cursor to the beginning of the next field
[Ctrl]+[End]	Moves the cursor to the end of the field
[Ctrl]+[→]	Moves cursor to the beginning of next word
[Ctrl]+[←]	Moves cursor to the beginning of previous word
[Shift] with any arrow key	Selects (highlights) text one letter at a time
[Ctrl]+[Shift] with arrow key	Selects (highlights) one word at a time
[Ctrl]+[C]	Copy selected (highlighted) text
[Ctrl]+[X]	Cut selected (highlighted) text
[Ctrl]+[V]	Paste selected (highlighted)text
[F7]	Spell check

Field	Proper Convention
Date	Avatar always saves dates in MM/DD/YYYY format. You can type shortcuts as follows: 020609 becomes 02/06/2009 112308 becomes 11/23/2008
Time	Avatar always saves times in HH:MM AM/PM. You can use military time as follows: 0123 becomes 01:23 AM 1345 becomes 1:45 PM
Phone Numbers	Must be typed in the following format: 650-555-1212 If you don't type the dashes, Avatar adds them for you.





<b>Field</b>	<b>Proper Convention</b>
Social Security Numbers	Must be typed in the following format: 555-12-4345 You must type the dashes for social security numbers. If not, you will see a message prompting for the correct format.
Address – Street	Do not use punctuation or special symbols, such as the pound sign (#) in addresses. 123 MAIN ST APT 3 The following abbreviations are accepted: ST, AVE, BLVD, WAY, CT.
Address – City	Type the full name of the city with no abbreviations. SAN MATEO
Address – State	Always a 2 letter abbreviation (CA, OR, NV).
Address – Zip	Always a 5 number code (94501).
<b>Red</b> field	Field is required and must be completed before a window can be submitted.
<b>Black</b> field	Field is standard and should be completed if possible.
<b>Grey</b> field	Field is not available. This can be because information is populating from another screen or you must complete a field or select a checkbox somewhere in the current window before inputting.