

myAvatar™

Scan and View Documents

Table of Contents

UNDERSTANDING SCANNING AND IMPORTING DOCUMENTS	3
What Documents Will I Scan?	3
WHO CAN PERFORM THIS FUNCTION?	3
MENU PATH	3
Document Imaging and Archiving – POS Window	4
Scanning Documents	5
CLINICAL DOCUMENT VIEWER	7
WHO CAN PERFORM THIS FUNCTION?	7
MENU PATH	7
The Clinical Document Viewer Window	7
Forms Selection by Categories.....	9
Clinical Document Viewer Search Results Window	10
Viewing and Printing a Scanned Document.....	11

LESSON SCENARIO

Maria Montoya is an administrator at a BHRS clinic. She scans a client's consent to treatment into Avatar in order to maintain a complete electronic record for the client and to ensure that the client's signature is on file.

The screenshot shows the Avatar Document Imaging and Archiving - POS interface. The main window displays a scanned document titled "San Mateo County Behavioral Health and Recovery Services APPLICATION FOR SERVICES AND CONSENT TO TREATMENT". The document includes the following information:

San Mateo County Behavioral Health and Recovery Services
APPLICATION FOR SERVICES AND CONSENT TO TREATMENT
Confidential Patient Information:
See California Welfare and Institutions Code Section 5328.

Client Name: APPLE, ADAM	DOB 1/1/1984
Social Security # 555-12-1234	MH Record # 390

I, hereby make application for myself, or my minor child, to receive care and treatment voluntarily from San Mateo County Mental Health Services.

I understand that such care and treatment may consist of an evaluation process, mental health services, case management, and, in some instances, medication.

If this application is accepted, San Mateo County Mental Health Services is authorized to administer the treatment/services described above. Such consent, however, does not waive my civil rights; I reserve the right to decline treatment against medical advice.

I further understand that I have the continuing right to an explanation of the treatment to be administered, and that I may address complaints about services to Mental Health Advocacy Services, 800-388-5189. I further understand that my records are confidential under Federal and State law, and will not be released to outside individuals or agencies without my expressed written authorization. However, I realize that certain information may be released without my authorization under circumstances described in the Mental Health Notice of Privacy Practices.

I have read the above and I agree to accept treatment for myself/my child, and I further agree to all conditions set forth herein. I acknowledge that I have received a copy of this agreement.

ADAM APPLE

Client/Parent or Guardian

Date 10/21/2009

The interface also shows a "Scan/Import" sidebar with fields for Client (APPLE, ADAM), Episode (# 1 Admi - 07/06/2009), and Document (App For Svcs & Consent to Tre). Buttons for "Add page to current document", "Save File to Avatar", and "Close Document" are visible.

myAvatar™ Scan and View Documents

In this lesson you will learn to scan documents into Avatar. The need to scan documents relates to documents that are available in paper form only, such as a client's driver's license, pay stub, proof of insurance, and so forth. It also includes paper based documents where a signature is needed, such as consents and Payor UMDAP reports.

You will also learn to view and print scanned documents.

Lesson Objectives

- Perform the steps needed to set up a document for scanning
- Use the document scanner to scan documents into Avatar
- Use the Clinical Document Viewer to view and/or print documents

UNDERSTANDING SCANNING DOCUMENTS

Avatar provides Point of Service (POS) scanning, which is *scanning on demand*. POS indicates that you can easily scan documents into Avatar just at the time you need to.

Scanning client-related documents into Avatar assures that key clinical information can be electronically shared throughout the organization. It eliminates the cost of managing and storing paper-based records, and it improves client quality of care by providing access to one comprehensive source of client information, the electronic health record.

WHAT DOCUMENTS WILL I SCAN?

The following list provides examples of documents that you would typically scan into Avatar.

- Assignment of Benefits
- Insurance Cards
- Driver's Licenses
- Signed Payor UMDAP Reports
- Consent Forms
- Signed Client Treatment Plans

WHO CAN PERFORM THIS FUNCTION?

Administrators scan documents into Avatar.


MENU PATH


Avatar CWS → Document Management → POS Scan or

Avatar CWS → Document Management → POS Scan64 for 64 bit machines

DOCUMENT IMAGING AND ARCHIVING – POS WINDOW

Use this window to describe the document you are scanning.

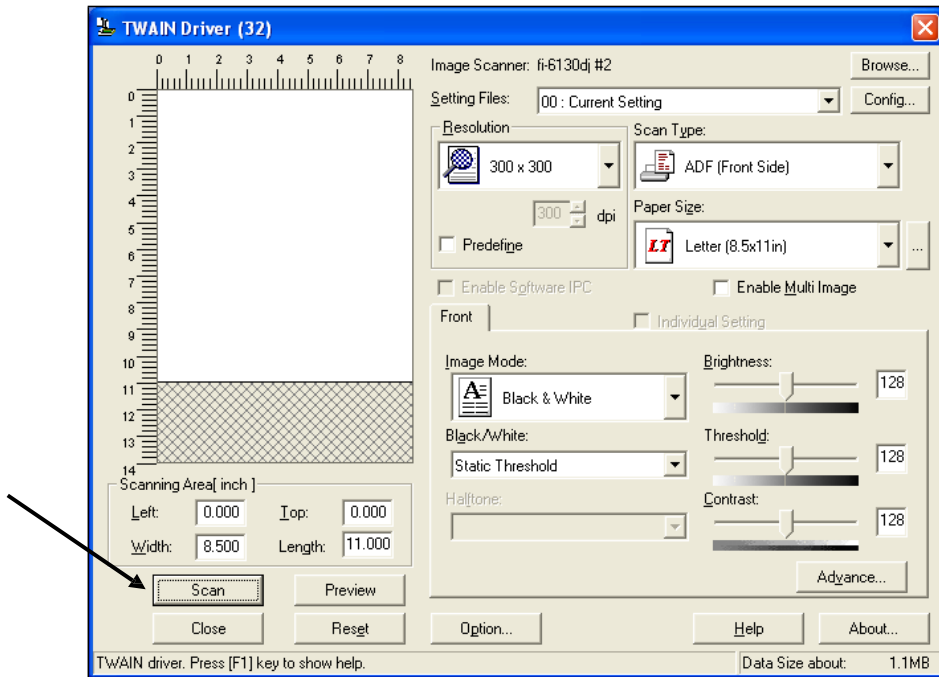
FIELD/BUTTON	DESCRIPTION
A) Type	Select Client from the dropdown list to view documents related to a specific client or select Staff to view documents scanned for a particular staff member.
B) Client	Type the last name of the client whose record you are attaching the scanned document to and tap [Enter] to retrieve the full client name. If there is more than one client with the same last name, use the dropdown list to select the correct client.
C) Episode	 IMPORTANT For Progress Notes and Treatment Plans, be sure that you select the correct episode to scan these documents into. For all other scanned documents select Non-Episodic.
D) Orignation Date	The Orignation Date is the date of the document. If a document requires signatures of both the clinician and the client and the client signs at a later date than the clinician, the date of the clinician's signature is the document date.

FIELD/BUTTON	DESCRIPTION
E) Form	 IMPORTANT Select the category that matches the type of document you are scanning. Choosing the correct form category is essential to allow others to retrieve the document in the future.
F) Scan	Click the Scan button to begin the scanning process

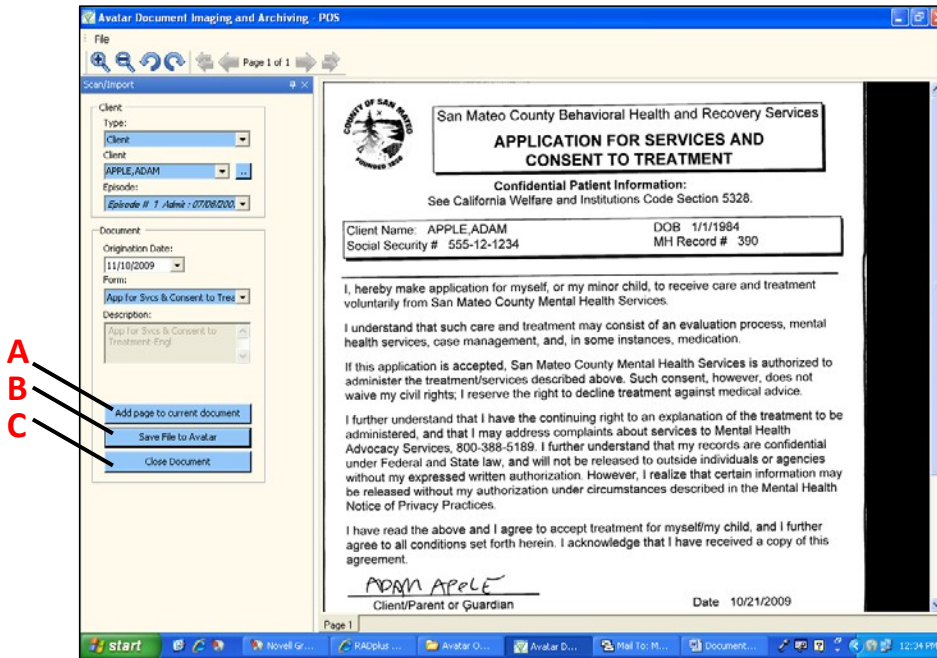
SCANNING DOCUMENTS

Clicking the Scan button in the Document Imaging and Archiving – POS window displays the dialog box shown in the following illustration. Clicking the Scan button in this dialog box begins the scan.

NOTE: The document should be face down in the scanner.



When the scan is complete, you see the scanned document displayed in the Document Imaging and Archiving – POS window. Verify that the quality of the scanned document is readable, and the signature is legibly.



BUTTON	DESCRIPTION
A) Add Page to Current Document	Use this feature if a page is missing from a document, if a page is damaged during the scanning process, or if the scanned image of a page is poor quality.
B) Save File to Avatar	Use this button to save the scanned document into Avatar.
C) Close Document	If the scanned document quality is poor, click the Close Document button and re-scan the document.

CLINICAL DOCUMENT VIEWER

Administrators use the Clinical Document Viewer to view documents scanned into Avatar, such as consents, scanned insurance documents, and so forth.

WHO CAN PERFORM THIS FUNCTION?

Administrators and clinicians have the ability to view, print and void scanned documents. The documents you can view depend on your level of permissions in Avatar. For example, documents indicating HIV status are restricted to specific staff members.

MENU PATH

Avatar CWS → Document Management → Clinical Document Viewer

THE CLINICAL DOCUMENT VIEWER WINDOW

Use this window to view documents that were scanned into Avatar.

The screenshot shows the 'Clinical Document Viewer' window with the following fields and controls:

- A:** Select Type dropdown menu (set to Client)
- B:** Select All or Individual Client radio buttons (Individual selected)
- C:** Select Client dropdown menu (set to APPLE, ADAM (390))
- D:** User dropdown menu (set to JILL MURPHY - CLINICIAN (JILLCL))
- E:** Document Status checkboxes (Final, Void)
- F:** Document Origination Date Start and End dropdown menus (Start: 07/01/2009, End: 12/01/2009)
- G:** Form Selection radio buttons (Entire Chart, Legal Medical Record, By Categories / Forms selected)
- H:** Program checkboxes (San Mateo Medical Center, Test program, Inp. Child Psych.)
- I:** Episode dropdown menu (set to Episode # 2 Admit : 11/03/2009 Dischar...)
- J:** Document Source checkboxes (POS Scan / Import, Batch Scanning Module, Web Service API, Document Routing)

Form Restrictions:

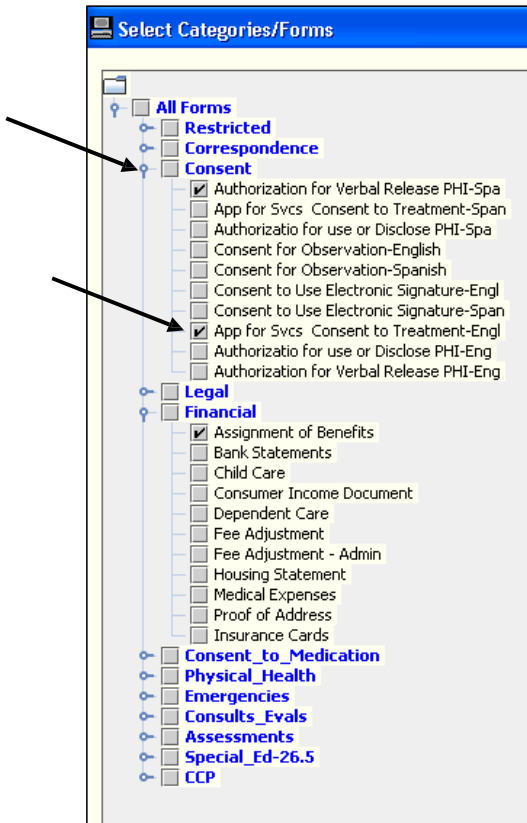
Form Restrictions	Include	Exclude
Do Not Print	<input type="radio"/>	<input checked="" type="radio"/>
Do Not Release	<input type="radio"/>	<input checked="" type="radio"/>
Archived Documents	<input type="radio"/>	<input checked="" type="radio"/>

Buttons: Process, Close

FIELD/BUTTON	DESCRIPTION
A) Select Type	Select Client to search for documents related to a specific client or choose Staff to locate documents that were scanned for a particular staff member.
B) Select All or Individual Client	Normally you will select Individual.
C) Select Client	Type all or part of a client's name and tap [Enter]. If more than one name appears, select the desired name from the list.
D) User	Choose yourself as the user.
E) Document Status	BHRS does not use this field.
F) Document Origination Date (Start/End)	Enter dates here to select a date range for documents you want to view.
G) Form Selection	If you wish to narrow your search, choose By Categories/Forms and click the Select button to display a list of document categories including, Restricted, Correspondence, Consent, Financial, Emergencies, and Assessments, as shown in the figure following this table. NOTE: If you need to print a restricted document, contact Quality Management.
H) Episode	To search for documents related to a particular episode, choose the episode from this list.
I) Document Source	POS Scan/Import is the only category BHRS uses.
J) Form Restrictions	Choose either Include or Exclude to narrow your search. Archived Documents is not used by BHRS at this time.

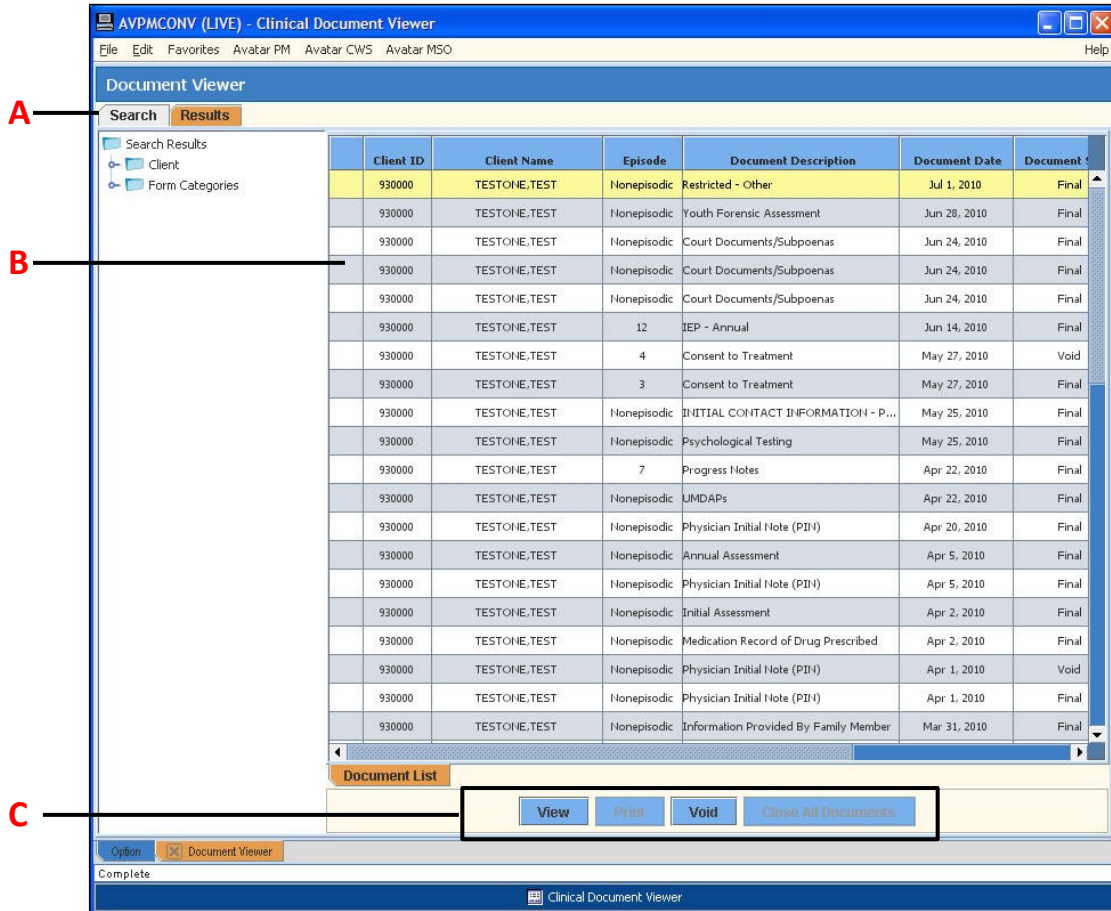
FORMS SELECTION BY CATEGORIES

Choosing By Categories/Forms in the Form Selection area and clicking the Select button displays the following window, which lists document categories. Clicking the Expand/Collapse button to the left of the category name expands or collapses the category listing. Clicking a checkbox defines which documents the viewer will retrieve.



CLINICAL DOCUMENT VIEWER SEARCH RESULTS WINDOW

This window displays a list of all documents that qualify based on the criteria chosen in the Clinical Document Viewer window.

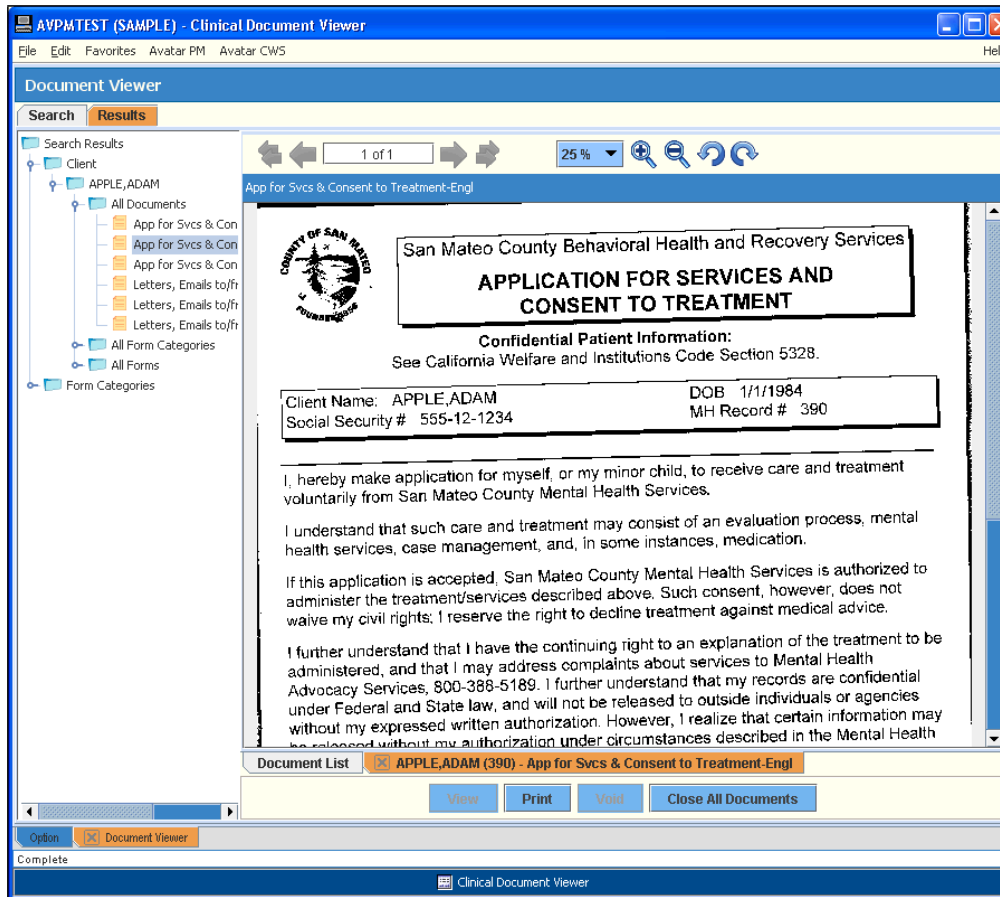


ITEM	DESCRIPTION
A) Search Tab	Click this tab to conduct another search or to return to the Search window where you can close the window.
B) Lock Icon	If a lock icon appears in this column, it means that the document is restricted, based on your Avatar permissions and you cannot print or view the document. NOTE: If you need to print a locked document, contact Quality Management.

ITEM	DESCRIPTION
C) Buttons	<ul style="list-style-type: none"> • View—View the selected document. • Print—Print the selected document. If the Print button is grayed out when you select a document, it means the document is restricted and you do not have rights to print it. If you must print the document, contact the ISD Help Desk at 573-3400 or Quality Management. • Void—Void the selected document. (Not everyone has rights to void scanned documents. Administrators have the rights to void documents.) • Close All Documents—Close all documents you opened during this session.

VIEWING AND PRINTING A SCANNED DOCUMENT

The following figure displays a document view. You can print the document, if needed, from this window.



CONCEPT REVIEW

See appendix for answers.

1. When scanning a document that is not related to a specific episode, what do you choose in the Episode dropdown list?
 - a. Episode #1
 - b. Non-Episodic
 - c. The most recent episode
2. When scanning a document, what do you enter as the Origination Date?
 - a. The date of the document
 - b. The current date
 - c. The client's admission date
3. Should you place a document you want to scan face up or face down in the scanner?
 - a. Face up
 - b. Face down
4. If you are using the Clinical Document Viewer, what do you do if you need to print a restricted document?
 - a. Find someone in your office who has access to the document and have them print it.
 - b. Forget about it.
 - c. Contact Quality Management.

APPENDIX—CONCEPT REVIEW ANSWERS

1. b
2. a
3. b
4. c