## 1.0 Policy

It is the policy of the Substance Abuse Prevention and Treatment Agency to provide to providers that are using the Avatar system a navigational document for Avatar.

## 2.0 Procedure

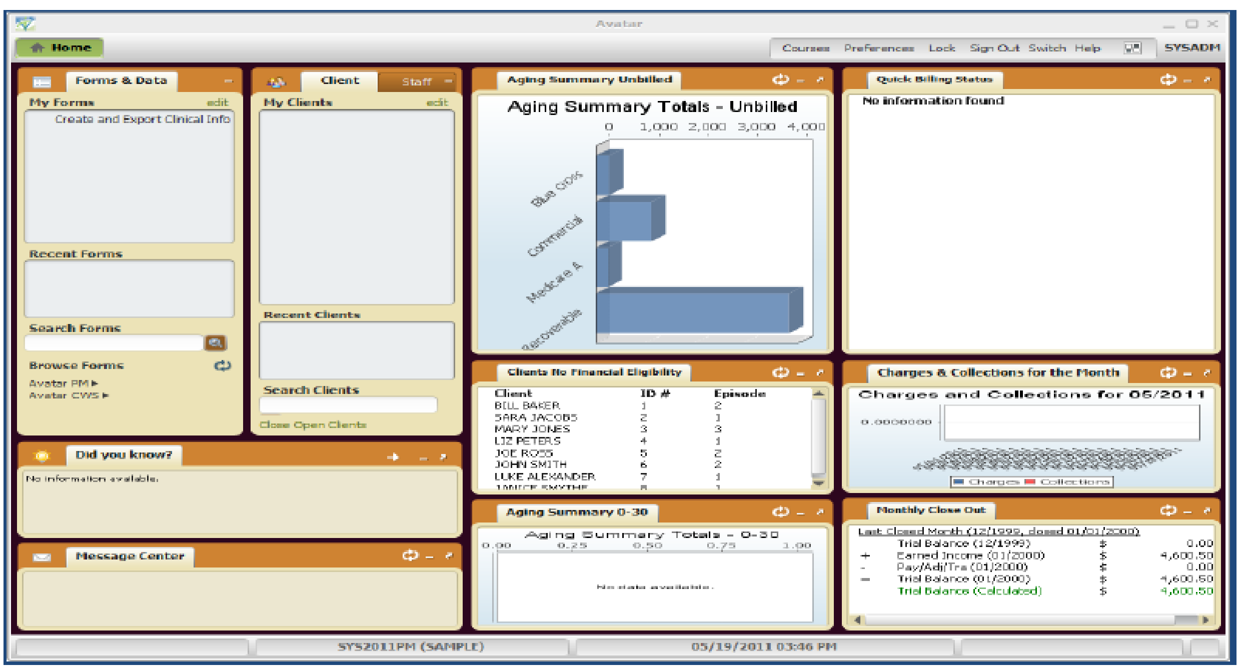
### The Home View

Each user is assigned a home view based on his or her user definition in myAvatar. Upon the initial login into Avatar, the *Default Home View* will display or one of the 3 Predefined *View Roles* that an Administrator can associate with a User Definition record. These *View Roles* are designed with a specific Home View layout but they can be modified to include or exclude other Widgets.

- Billing
- Clinician
- Front Desk
- System Administrator

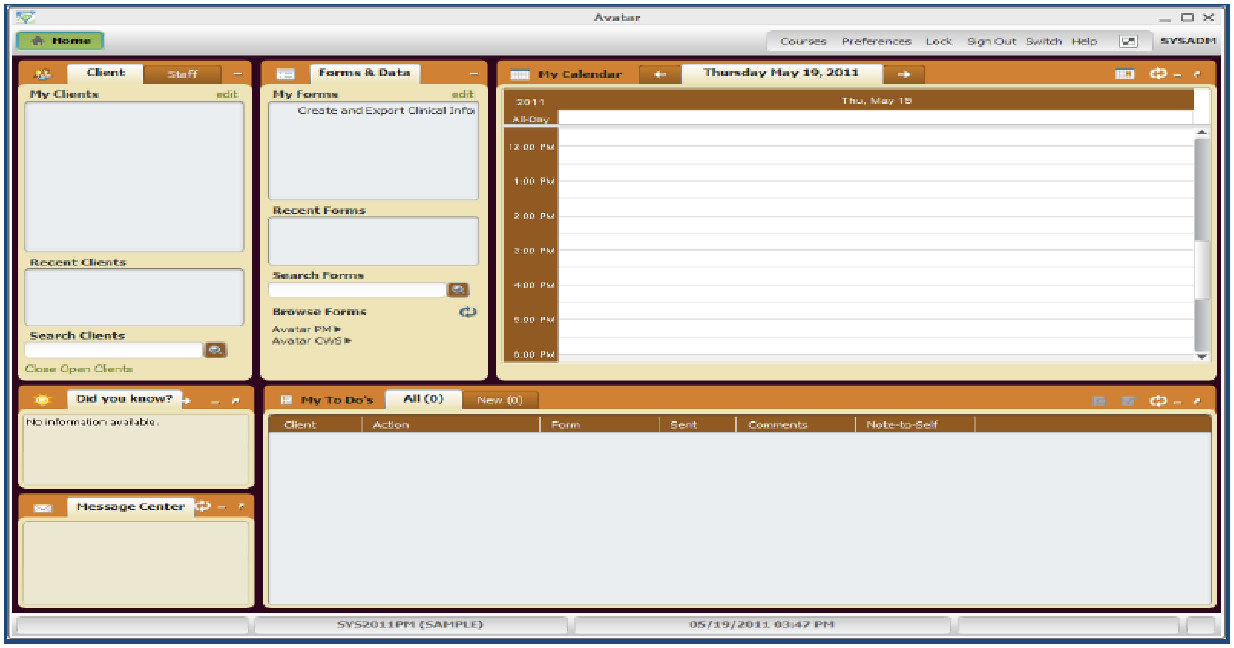
### Billing View

This *Home View* shows clients without eligibility, snap shots of account receivables, status of Quick Billing and Monthly Close Out.



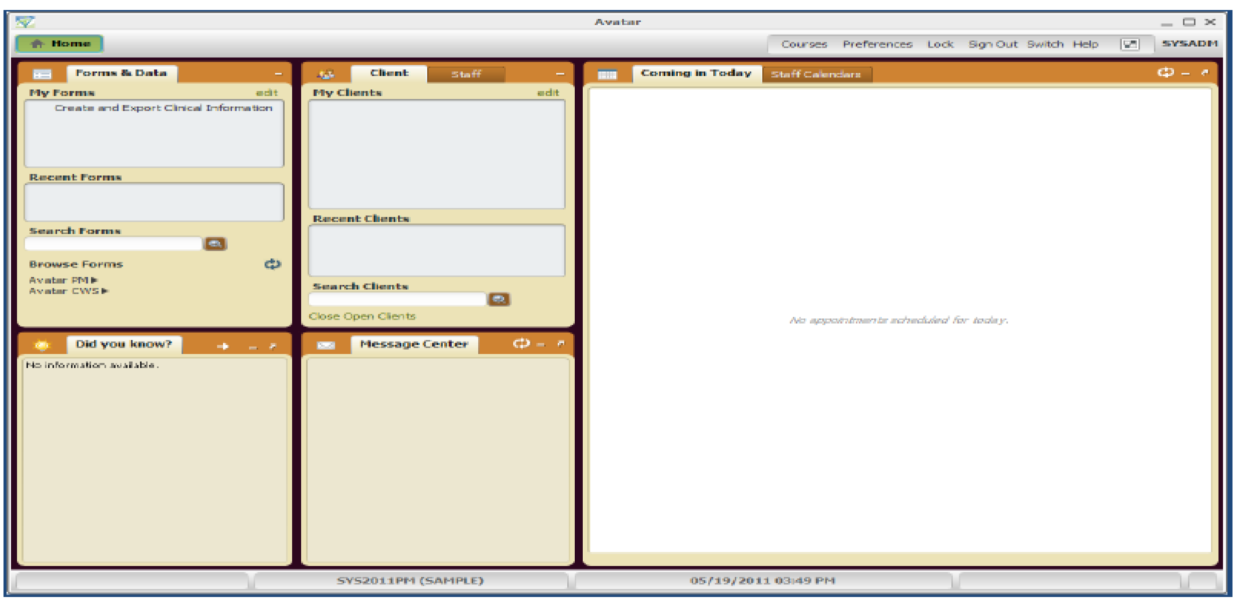

### Clinical View

This *Home View* allows Clinician's to manage their clients, see their To Do List and Calendar.



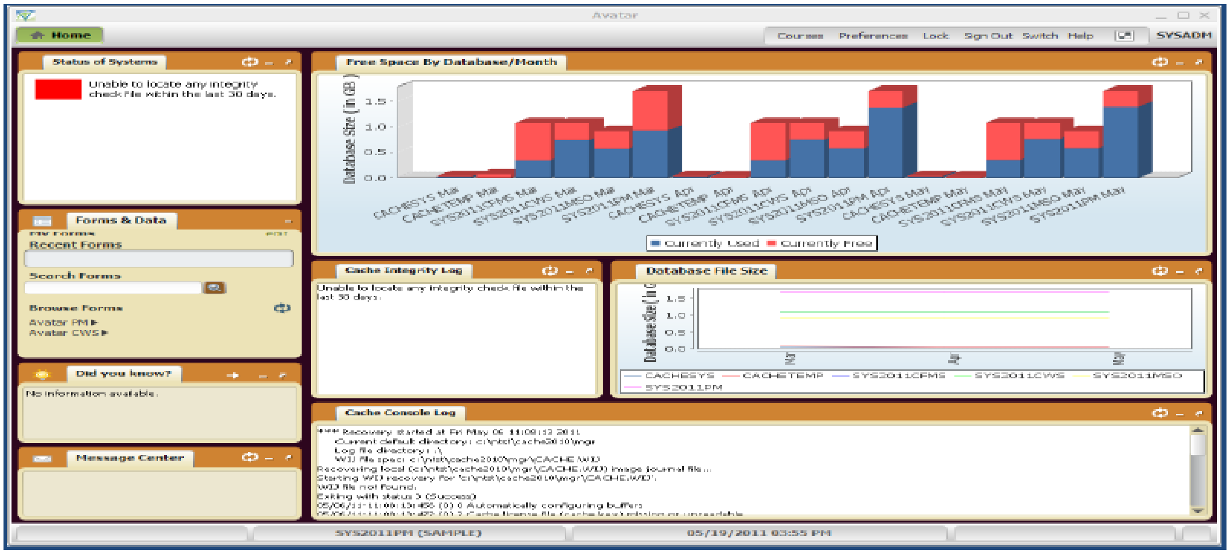

## Front Desk View

This *Home View* allows front desk personnel the ability to manage client appointment and quick access to update client data.



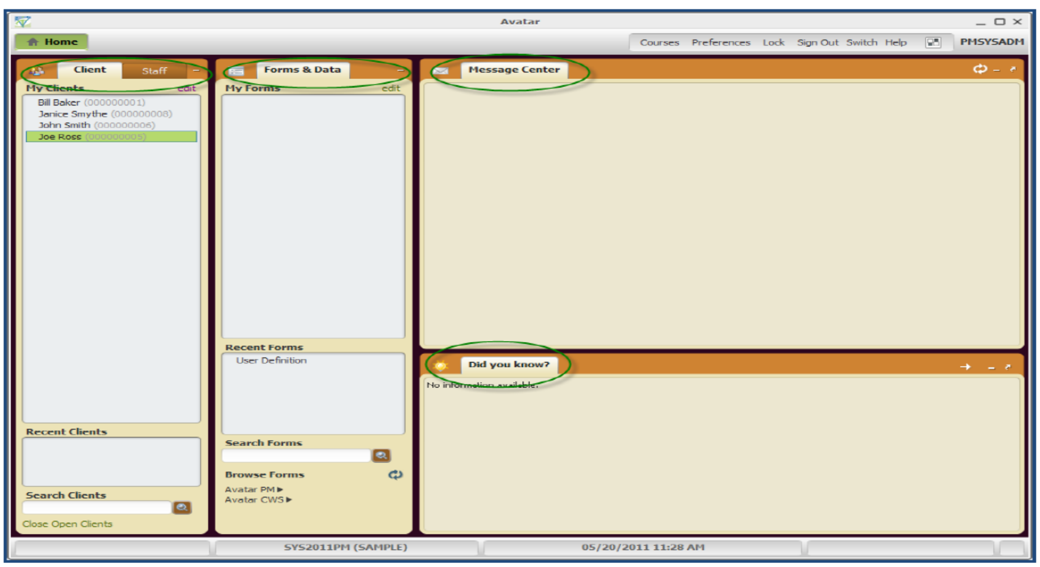

## System Administration View

This *Home View* allows System Administration personnel to view a dashboard to monitor system status, database size, interfaces and integrity checks.




The default home view will always display the following:

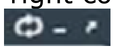
- Client/Staff Widget
- Forms & Data Widget
- Message Center
- Did you know?




The Menu Bar at the top of the home view contains a Home Button and user preferences. The home button will return you to your Home View no matter when you are within the system and displays any Forms or Charts that you have open. Each users home view forms are customized based on their user role.

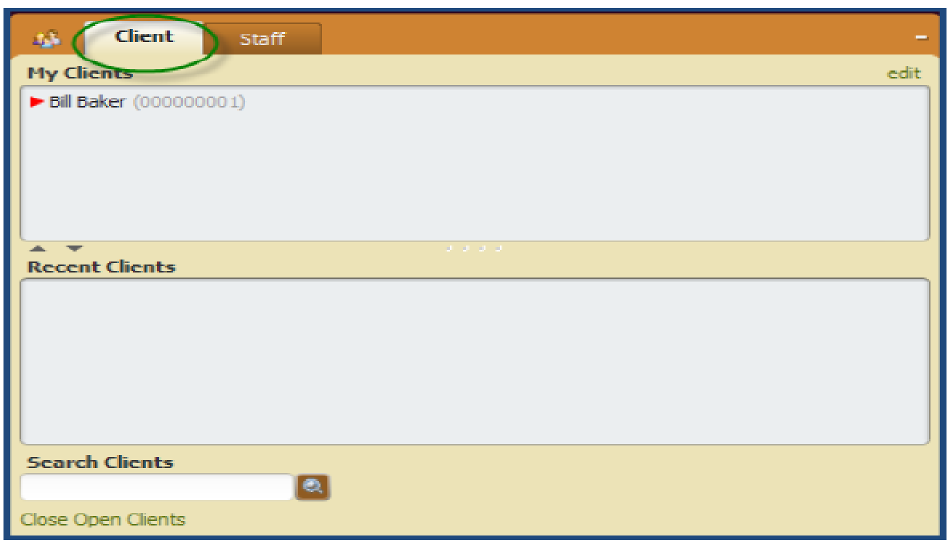
You can have multiple forms and charts open at once and they will all be listed here so you can toggle back and forth between them and the home view without using the windows task bar. The **Menu Bar** also contains your **Preferences** and **Help** menus and displays the **User ID** that is logged in.

Directly from the **Home View** you can move the widgets assigned to the view by dragging and dropping.

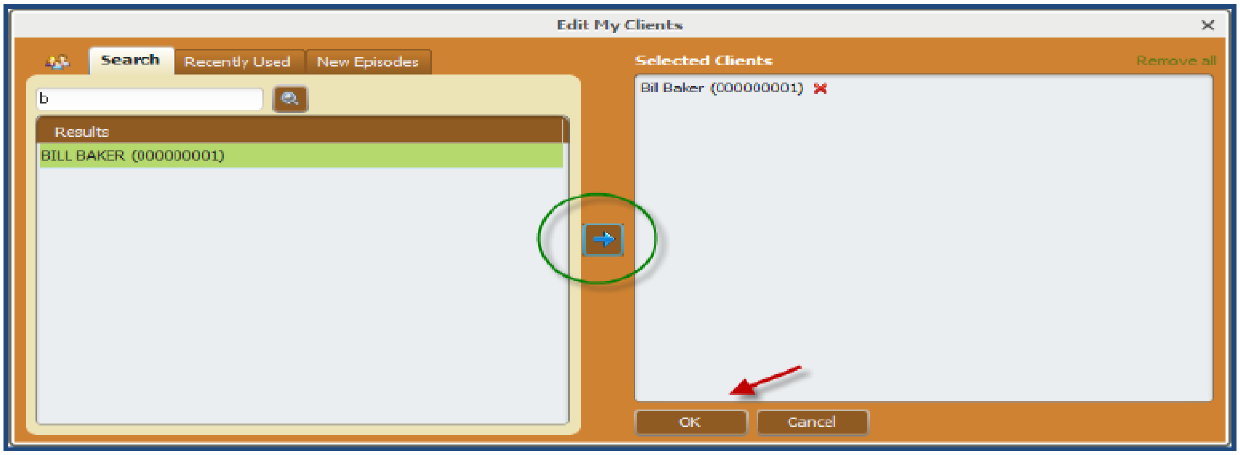
- You can also re-size the widgets using the cursor.
- The icons on the top right corner of most widgets include **refresh, minimize/ maximize, and undock/ re-dock.** 
- **If Lost in Home View** – If you have re-sized or lost some widgets and you just want to return to the default view, click on the checkerboard icon at top right. You are now in "Customize Widgets" form. Go to bottom left of form, click on "Reload Home View". You are prompted to confirm reload. Click yes and click on "Apply". Your original View re-appears.

**Client/Staff Widget:**

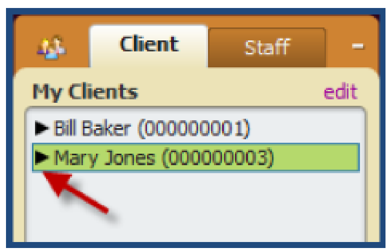
The *Client/Staff Widget* provides the ability to display a list of current clients and staff.




- My Clients: the User has the ability to add clients for their current session by selecting 'edit' on the top right of the Widget. These added clients will only appear for the current session. Those client assigned to the User's caseload will always appear.

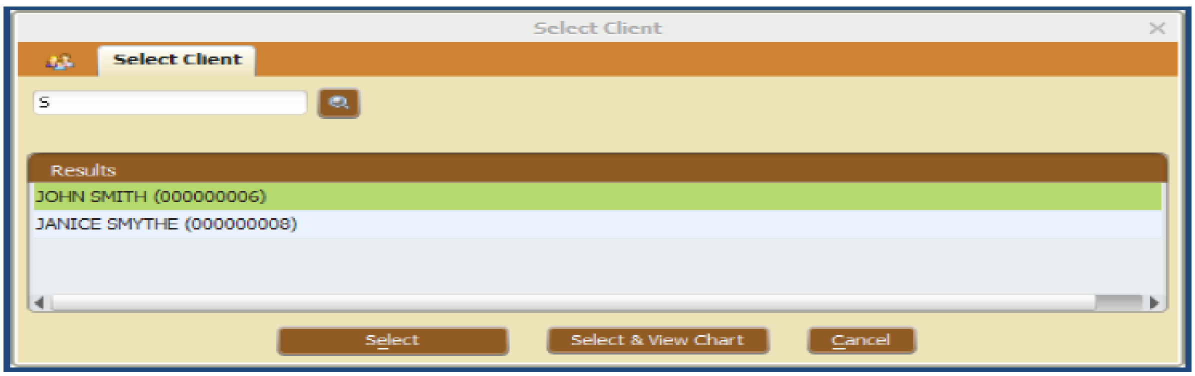



- For clients with associated To Do Items, a client status indicator will display within the Client section of the Client/Staff Widget. The indicator, as shown below, will be black if the To Do items were sent today. The indicator will be red if the To Do items are older than today.




- My Staff: If a User is associated with a Practitioner, their name will appear under the My Staff section. In addition, Users have the ability to add staff for their current session by selecting ‘edit’ on the top right of the Widget. These added staff will only appear for the current session. If a user is associated with a site then all of the staff for that site will display under the My Staff list.

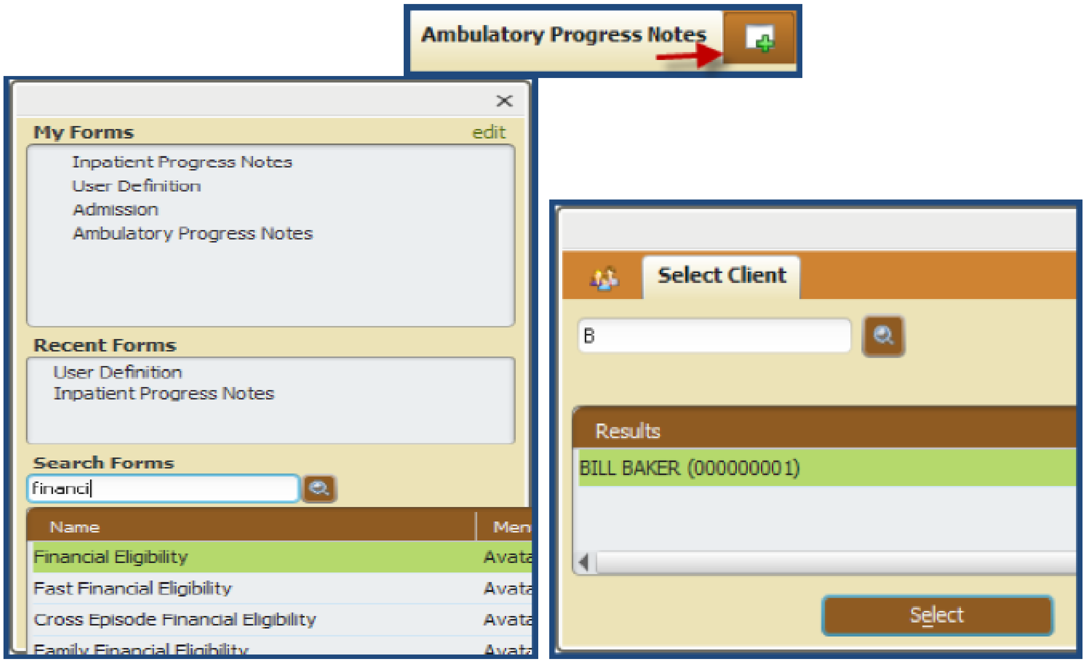
- Recent Clients/Recent Staff: List of clients/staff you have accessed in this session. This list will be reset at log out. Right mouse click to *Display Chart* or *Remove from List*. You can drag and drop a staff from your Recent Client list up to the My Staff list and it will permanently add that staff person to your list of staff.
    - Search Clients/Search Staff: This new format uses the *Smart search*. As you type the last name, the drop down will display the client or staff meeting the search criteria.
    - You can select the client or staff by double click or by using the arrow keys to move to the desired client and press *Enter* to select. Hitting the magnifying glass will launch a search window.
    - If searching for a client you have the ability to select or select and view chart, which will launch the Client's Chart Review.




**Forms & Data Widget:**

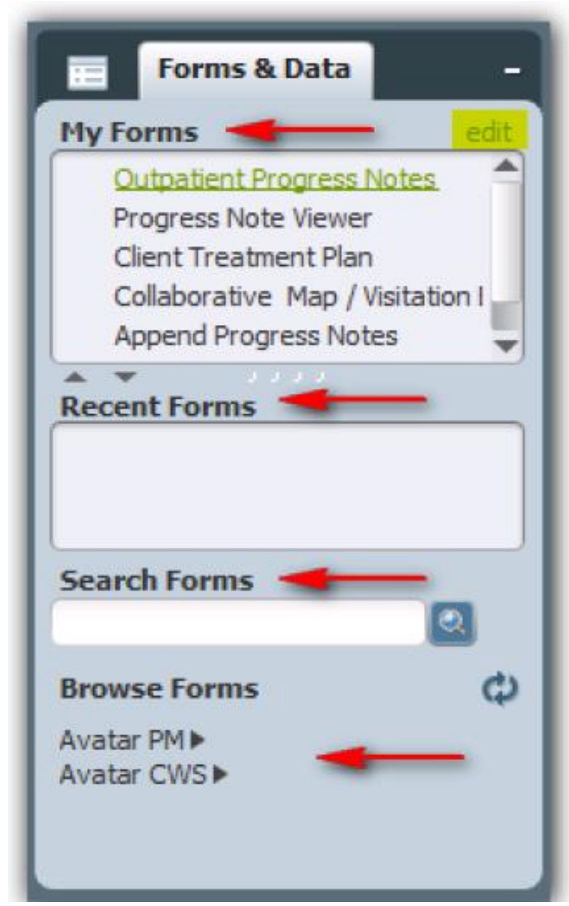
The *Forms & Data Widget* provides the ability to display a list of frequently used Forms defined for the User, recently used Forms and the ability to search for Forms.

- Opening Multiple Forms: Forms can be accessed at any time within another Form. The icon shown below that appears to the right of the Form name can be used to search for a new Form. If it's a client specific form, a client search field will prompt the User in order to launch a new Form for a new client.




- My Forms: will display Forms that are frequently used and are assigned to a User Role. In addition, the User has the ability to add Forms to their My Forms section by selecting 'edit' on the top right of the Widget and search for the Form to add. Users can also drag a Form from the Recent Forms section to the My Forms section

1. The top section of this form is titled **My Forms.**. All of your favorites will carry over and display in this section of the widget..
2. In order to edit your **My Forms** click **Edit** at the top right of the widget.
3. Any form that you access within your session (before you log out) will remain in the **Recent Forms** section.
4. You can drag and drop a form from the **Recent Forms** section into the **My Forms** section and it will remain there after logging out.
5. **Search Forms** field is a **Smart Search** field. In this field you can search for a **Form** by typing in the entire name or just part of the name of the form.
6. You can also use the **Browse Forms** drop down menu for each product. The Browse Forms in Avatar 2011 is the same menu type as the earlier version of Avatar.

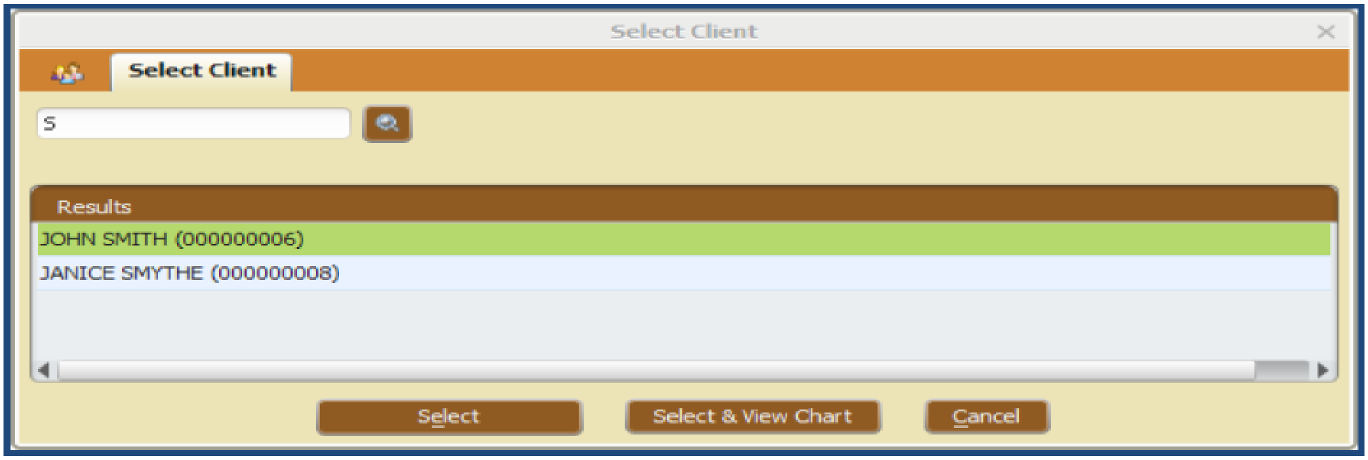



## Smart Search Function

*Smart Search* is a search format that will dynamically display all results as you type in the search criteria. All results conforming to the criteria will display. As more information is entered into the search prompt, the results will be refined. This Smart Search feature is available when searching for Clients, Staff or Forms within *myAvatar*.

- Searching for Clients or Staff: This format uses the Smart Search. As you type the last name, the drop down will display the client or staff meeting the search criteria.
    - You can select the client or staff by double click or by using the arrow keys to move to the desired client and press Enter to select. Hitting the magnifying glass will launch a search window.

- If searching for a client you have the ability to select or select and view chart, which will launch the Client's Chart Review.




Once you select the client and click **Select**, the form selected tab will show up. If an episode is required, the form will list out all the episodes. Select the episode and click Ok.

- In the **Smart Search** field, enter the client's Last Name, ID, etc. to search. To open the client's chart you can double click on the client name in the search drop down. Additionally, you can click once on the clients name or use the down arrows to navigate to the client's name and press the enter key.

- The client's name will populate in the **Recent Clients** section and you can double click on the name from there or right click on the name and select **Display Chart.** Finally, if the client's name is populated in the **Recent Clients** section, you can make sure it is highlighted and then search for or click on a client-specific form in the **Forms and Data Widget.**

**Courses**

The courses option listed in the toolbar has no functionality for SAPTA clients.

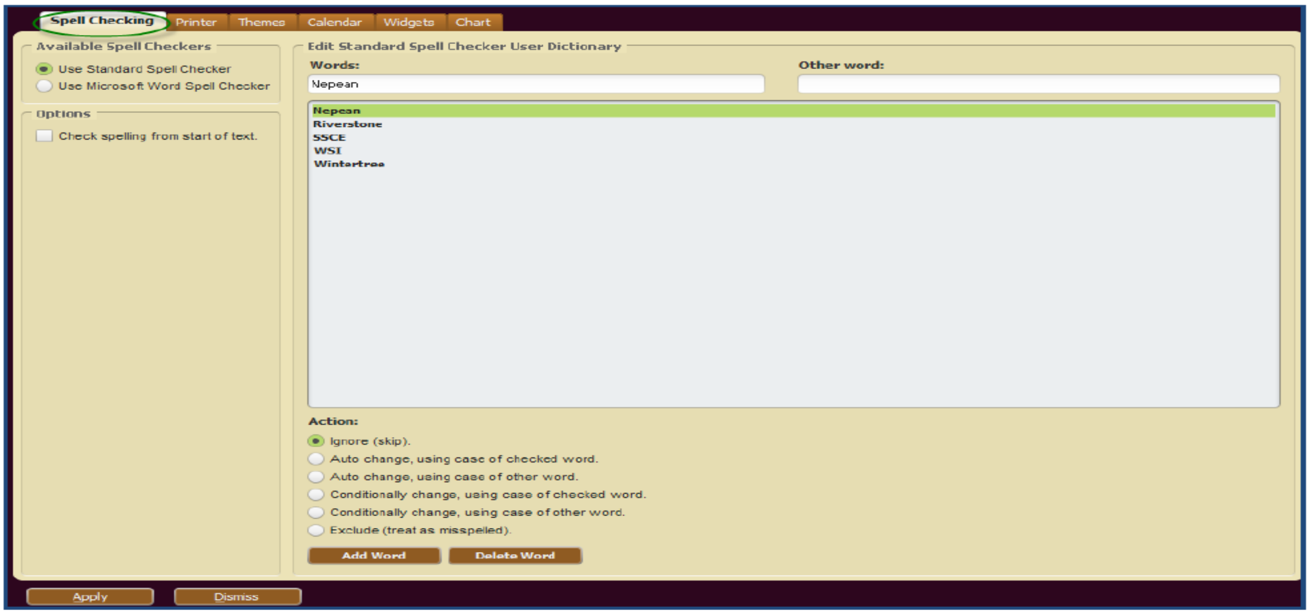
**Preferences**


The ***Preferences*** Form can be accessed in the menu bar on the top right of your screen. This Form allows the User to define the following basic *RADplus 2011* functionality.

- Spell Checking
- Printer Settings
- Themes
- Calendar
- Widgets
- Chart

## Spell Checking

The *Spell Checking* tab allows Users to define how spell checking is performed throughout Avatar.

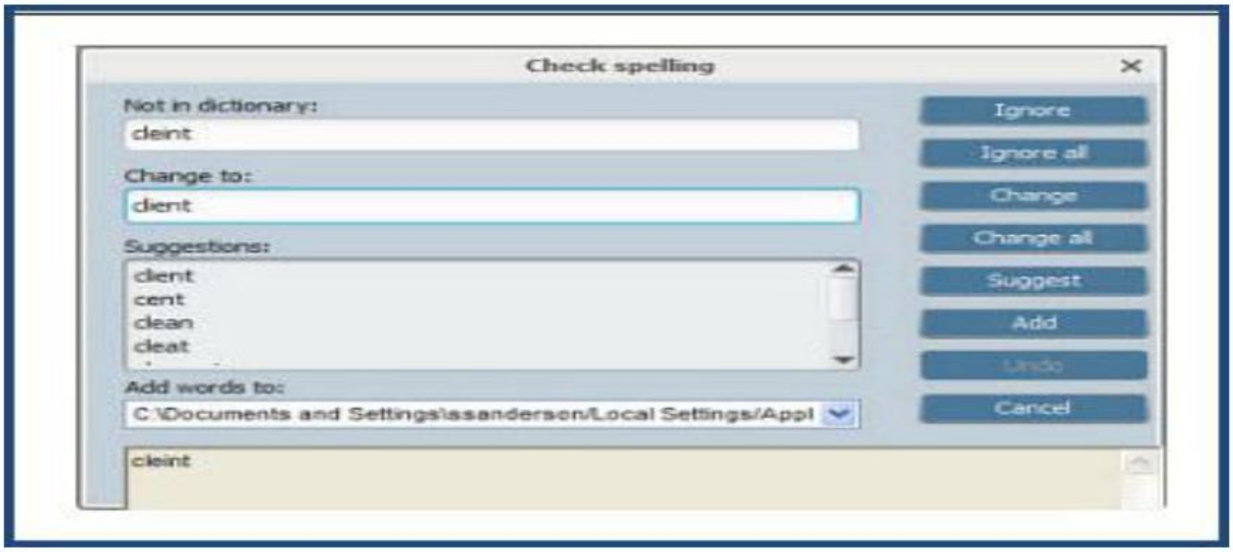



The available Spell Checker choices are to the Standard or Microsoft Word Spell Checkers.

- Users can decide whether the spell check process will begin at the start of the text. If this option is not selected, spell check will start at the cursor mark.
- Additions and edits to the Spell Checker User Dictionary can be made within this tab.

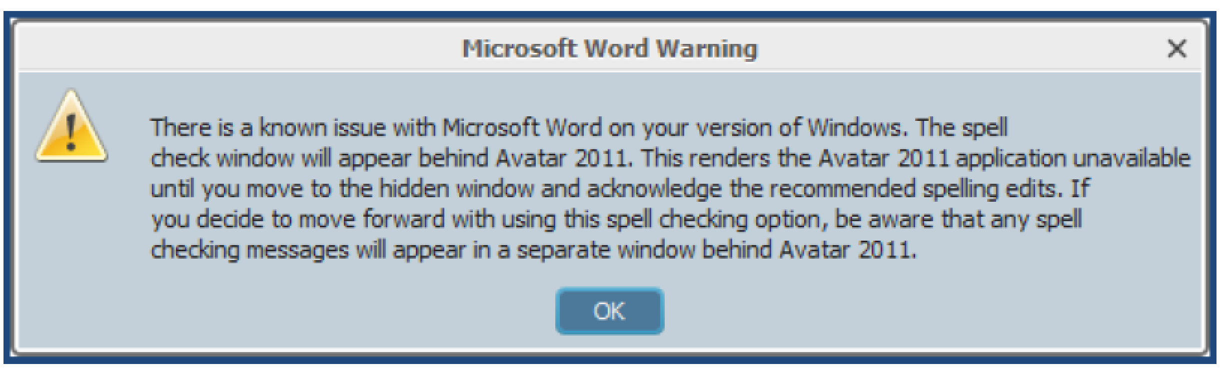
### *Spell Checking Use*

- Fields with spelling errors will be underlined in red. Users can either click F7 or right click a misspelled field and select Spell Check.
- The Check Spelling dialog



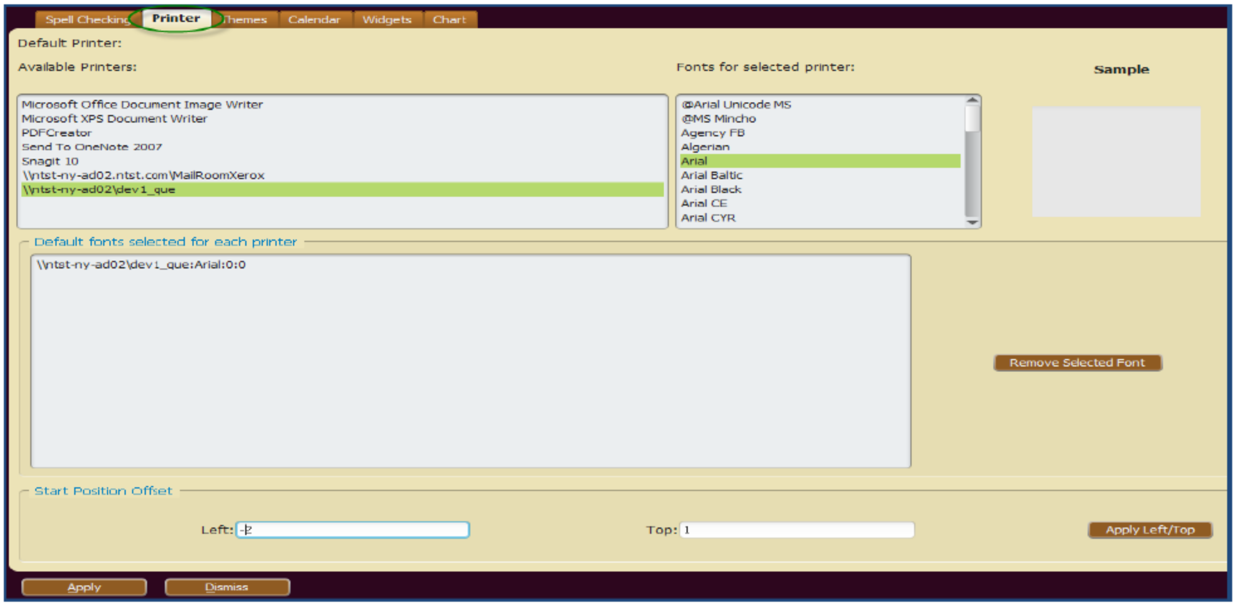

### *Using Microsoft Spell Checker*

- Users that choose to use Microsoft Spell checker will receive the following warning message upon selecting "Use Microsoft Word Spell Checker" within the Preferences screen. The warning message informs the use of a known issue with using Microsoft word as the Spell Checker in a *RADplus 2011* environment. The spell check window will appear behind the *myAvatar* session when it is launched for spell checking functions. Users must move to the hidden window and acknowledge the spell check edits.




### Printer

The *Printer* tab allows Users to select the printer and fonts to be used when printing Avatar information.



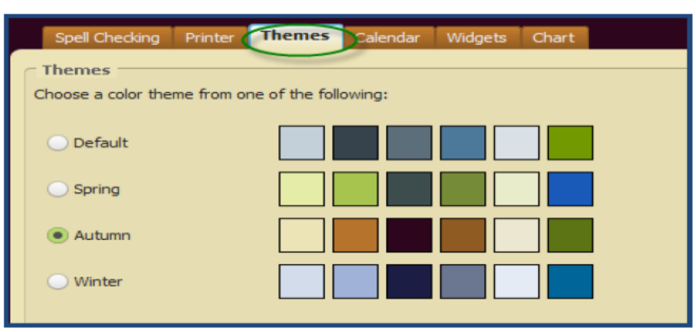

- Users can choose default fonts to be used for specific printers.

- Start Position Offset- will adjust the printer start position.
    - In the *Left* field, enter a negative number to move the start position to the right.
    - In the *Top* Field, enter a positive number to move the start position down. Enter negative numbers to move the top start position up.

- The User must be given permission to change printer fonts within the *User Definition* or *User Role Definition* Forms.

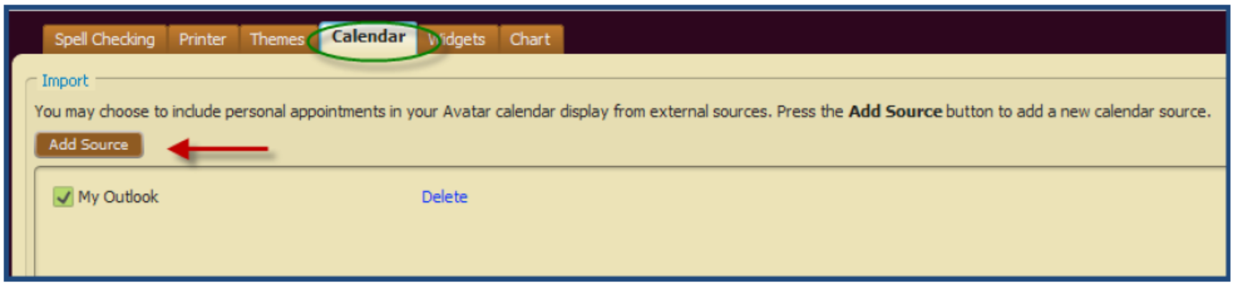
**Themes**

The *Themes* tab allows Users to select a default color theme for the Avatar application. In order for the new theme to take effect, Users must log out of the *myAvatar* session, close the browser and re-launch the Avatar system.

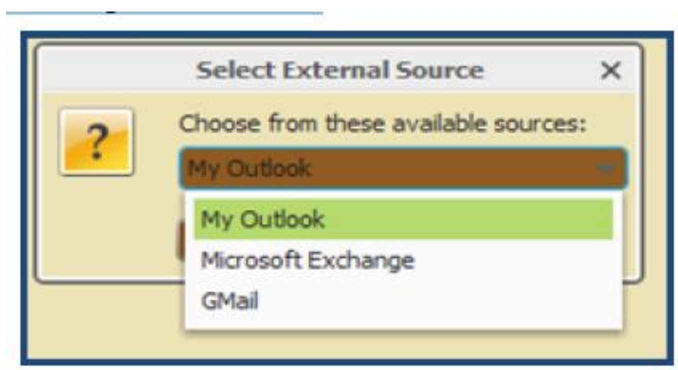


## Calendar

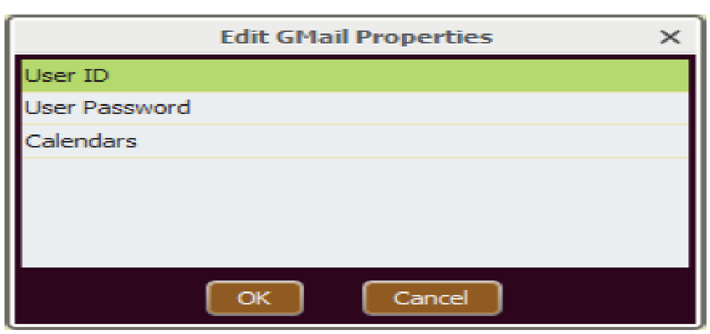
The *Calendar* tab allows Users to select an external source to include personal appointments in the Avatar calendar display.



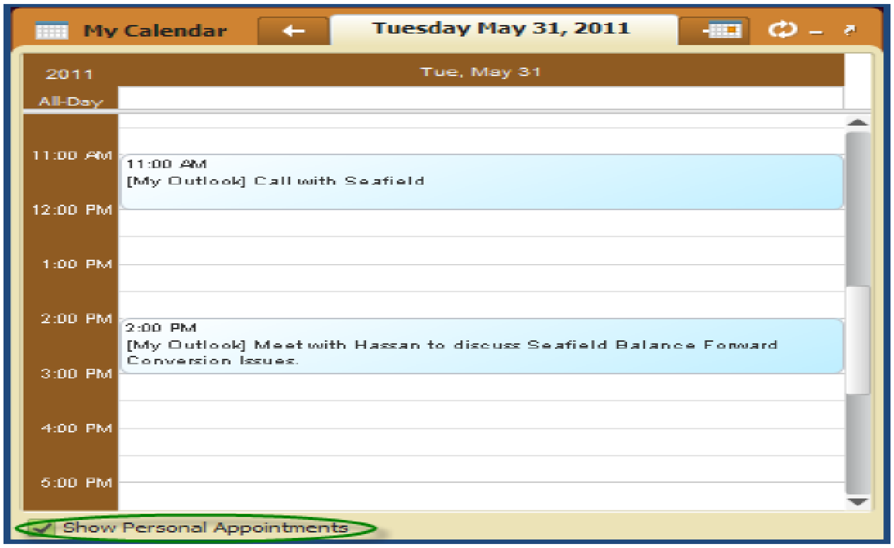

- Press the *Add Source* button to add a new calendar source. The current choices available are My Outlook, Microsoft Exchange and Gmail.




- In the *Select External Source* dialog, choose the email source.
- Click *Ok*.
- If appropriate, click *Configure* to change email properties for the account.
- The account properties dialog displays. Enter the details, click *Ok*.




- The *Calendar Widget* will now display the appointments from the linked external source, as shown below. In addition, the Calendar integration with the *Appointment Scheduling 2011* module can be seen when scheduling appointments for the User. This can be seen within the *Scheduling Calendar* Form.



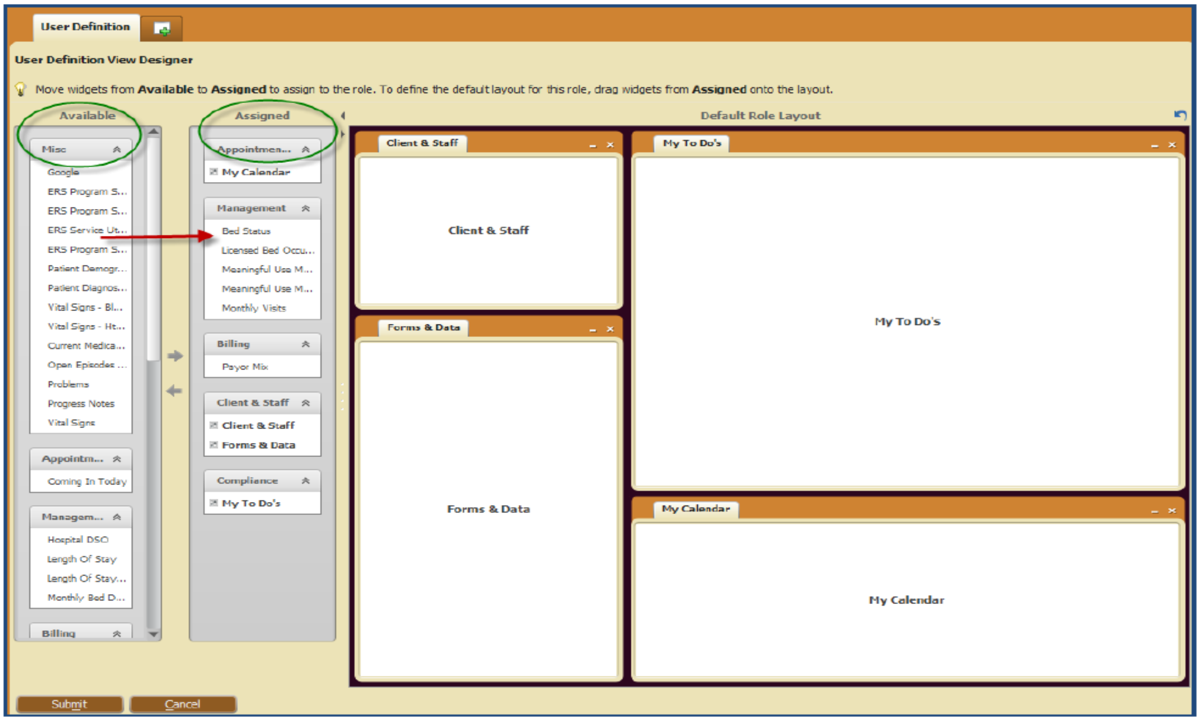

**Note-** If you wish to choose My Outlook as an available source when configuring your Calendar, you must be using Microsoft Exchange 2007 or 2010.

**Widgets:**

The *Widget* tab of the *Preferences* Form is the *Customize Widget* screen. This is similar to the *Home View Designer* contained within the *User Definition* and *User Role Definition* Forms, shown below. The *Home View Designer* can be used to control the Widgets displayed in the Home View. System Administrators can grant access for Widgets to be available to Users to add on their own using the *Customize Widget* screen.

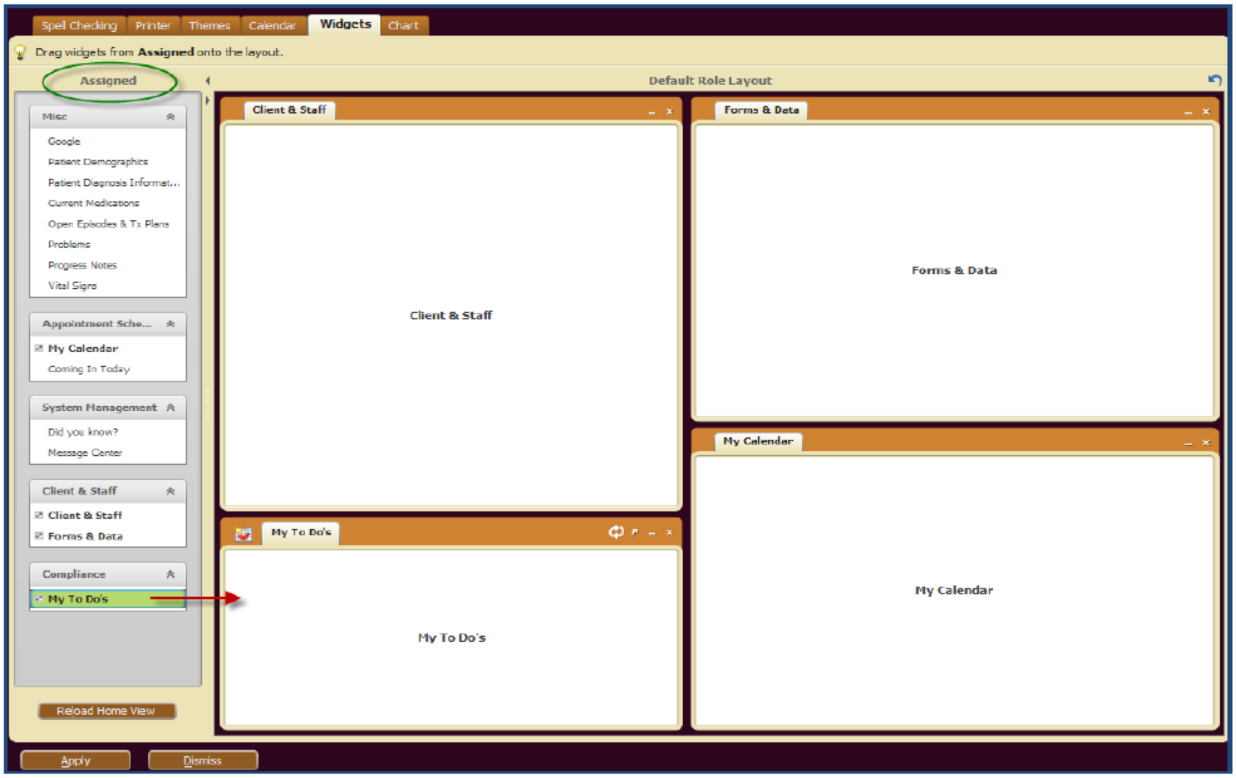
*See **View Roles Overview** section in this document for more information on the *Home View Designer*.

**Home View Designer in User Definition/User Role Definition**

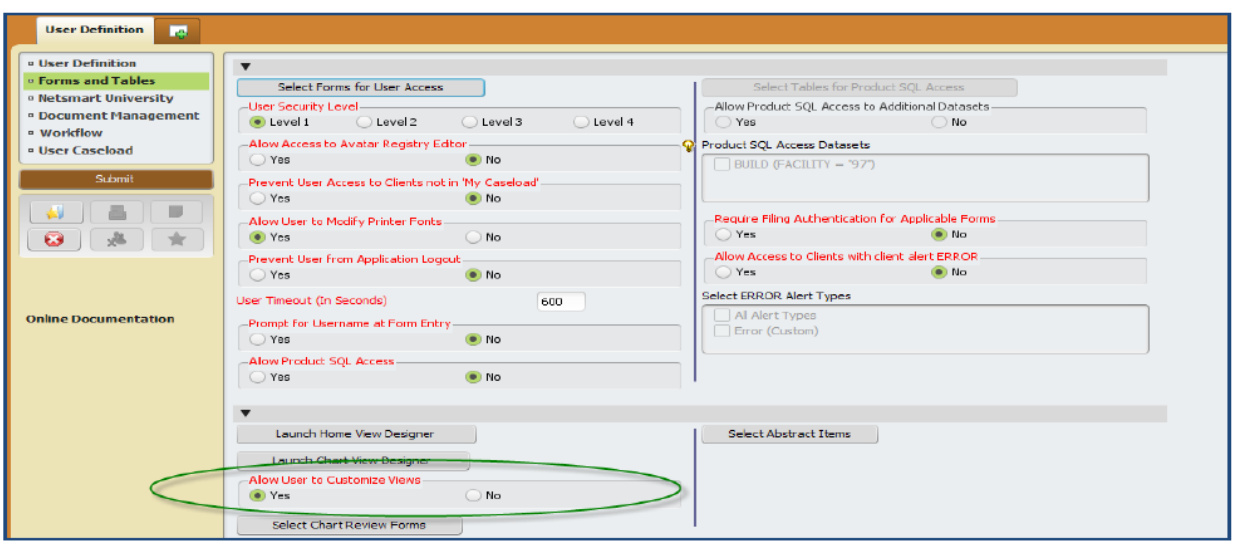



**Customize Widget Screen in Preferences**

Changes made to the *Customize Widget* screen with the *Preferences* Form will be specific to that User. Any Widget assigned to that User within either the User Definition or User Role Definition Forms will appear in the 'Assigned' column of the *Customize Widget* screen. Users can add these Widgets and resize or move the Widgets to their preferred display.



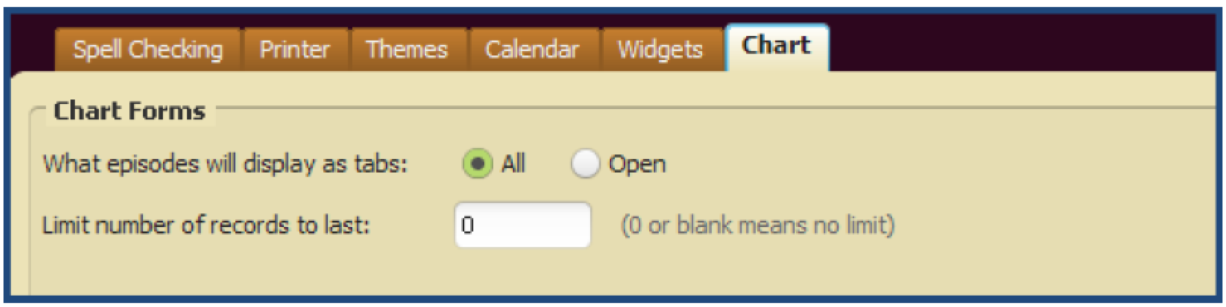

Changes made within the *Customize Widget* screen will not be permanently saved unless the User is granted the right to "Allow Users to Customize Views within User Definition or User Role Definition by answering "Yes" to this question. If the "Allow Users to Customize Views" question is set to "No", any changes made within the *Customize Widget* screen will be reset to the Users original assigned Home View after logging out of Avatar.



- Users can also access the Customize Widget tab by clicking on the following icon on the top Menu Bar.


**Chart**

The *Chart* tab of the *Preference* Form allows a User to define what data should appear within the *Chart View*.

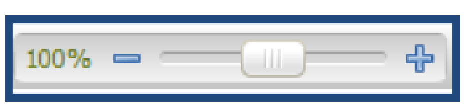



- In the What episodes will display as tabs field:
    - Select *All* to display all client episodes in Chart View.
    - Select *Open* to display open client episodes in Chart View.
- In the Limit number of records to last field:
    - Enter the number of client records to display in the Chart Overview

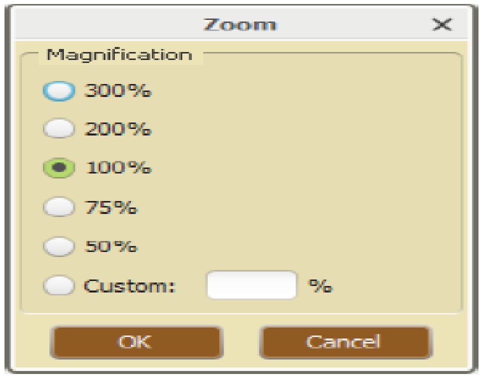
**Lock**
**Sign Out**
**Switch**
**Help**

**Zooming**

*myAvatar* allows Users to change the size of text and fields in a Form by zooming. The zoom bar is located at the bottom right of an open Form. There are different ways to zoom:



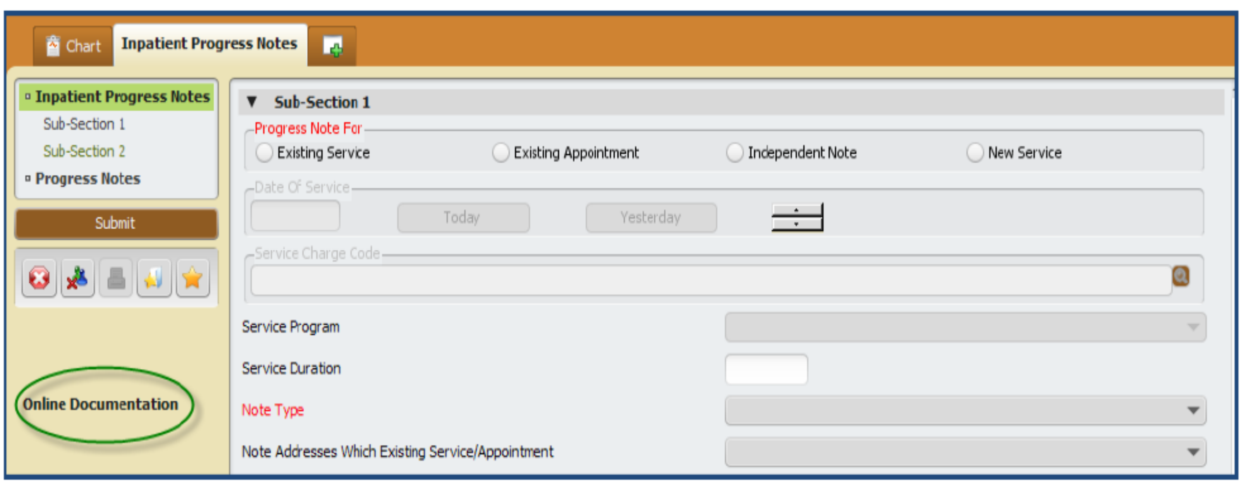

- Click and hold the zoom slider
- Click the plus or minus buttons to zoom in or out by 10%.
- Click the zoom level to display the Zoom Level screen
-

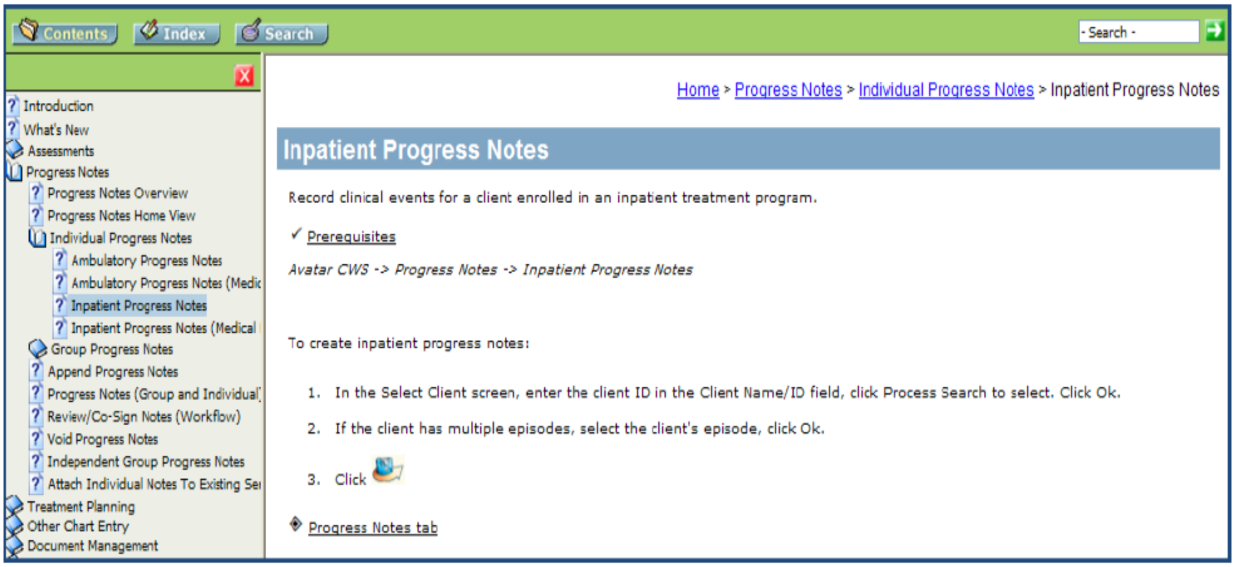



- Select a zoom percentage, or click Custom to enter a specific zoom level and then click Ok.
- The zoom setting for a Form is saved even after exiting the Form or logging out of Avatar.

**Online Documentation**

*myAvatar* allows Users to access Online Documentation from within any Form. The link to the Online Documentation is located on the left bar of the Form display. The Online Documentation will open in a new browser window to the section that addresses the Form the User currently had open.





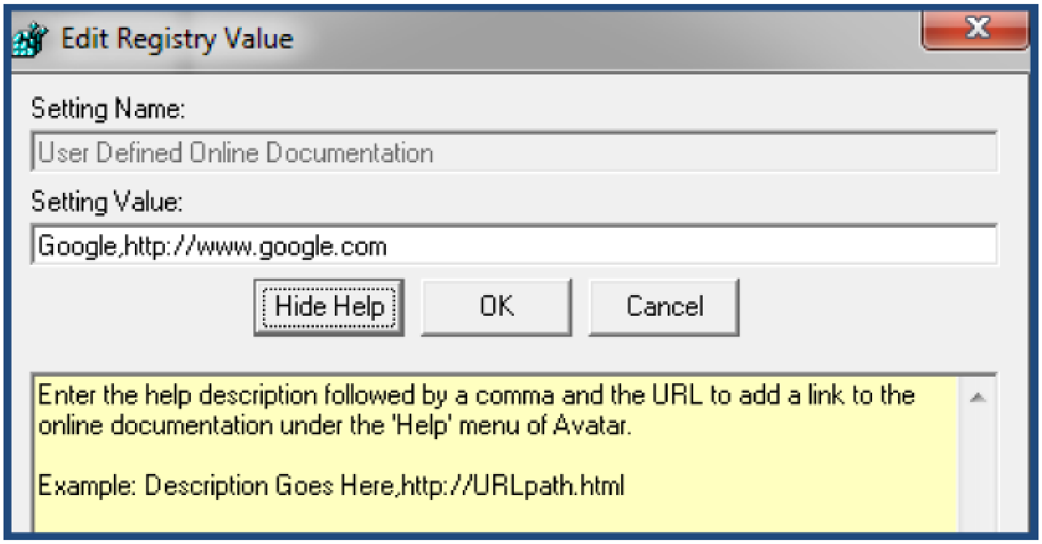

The following products are currently setup to work with the Online Documentation link:

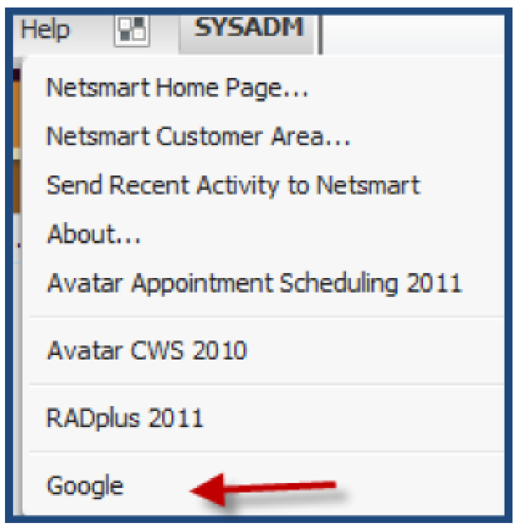
- Appointment Scheduling 2011
- Avatar State Forms – Ohio, Florida
- Cal-PM 2007
- CWS 2010
- eMAR 2011
- Incident Tracking 2011
- MSO 2011
- OE 2011
- RADplus 2011
- RxConnect

**Customized Online Documentation**

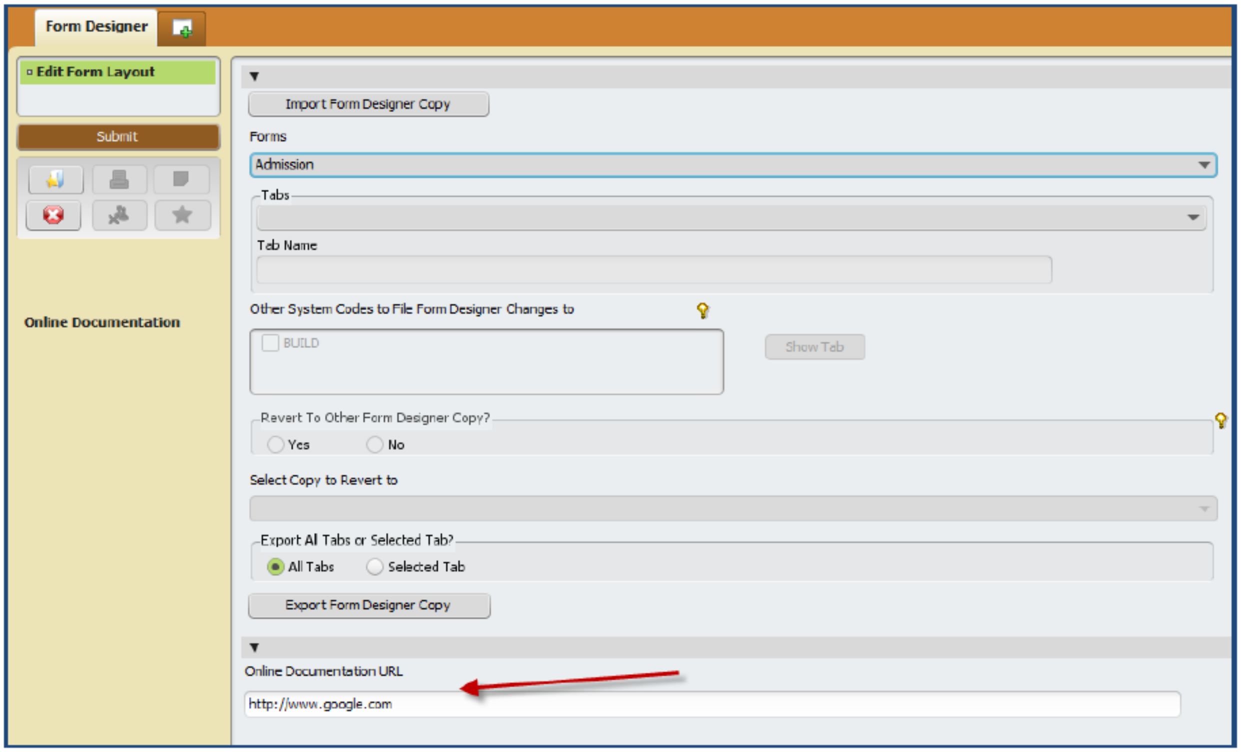
Agencies now have the ability to customize their own online documentation. This can be done in one of two ways:

- ***Help Menu***- A new Registry Setting 'RADplus☐ Documentation☐ Online Documentation☐ User Defined Online Documentation' is added to allow users to define an additional menu item under the menu 'Help'. Enter the description to appear on the 'Help' menu followed by the URL. Users can then access the additional documentation by going to the 'Help' menu and launching the link. This will work with any valid URL.




- ***Within Forms***-Add a link to additional documentation that Users can launch from within Forms in Avatar. This setup is done within *Form Designer* and will override the 'Online Documentation' link of Avatar forms with an alternate valid URL. After defining the URL in the *Online Documentation URL* field, submit the *Form Designer* Form.



Form Designer
Edit Form Layout
Submit
Online Documentation
Import Form Designer Copy
Forms
Admission
Tabs
Tab Name
Other System Codes to File Form Designer Changes to
BUILD
Show Tab
Revert To Other Form Designer Copy?
Yes
No
Select Copy to Revert to
Export All Tabs or Selected Tab?
All Tabs
Selected Tab
Export Form Designer Copy
Online Documentation URL
http://www.google.com

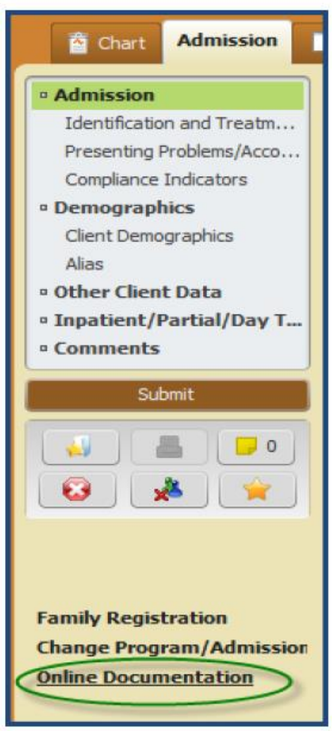



Chart
Admission
Admission
Identification and Treatm...
Presenting Problems/Acco...
Compliance Indicators
Demographics
Client Demographics
Alias
Other Client Data
Inpatient/Partial/Day T...
Comments
Submit
0
Family Registration
Change Program/Admission
Online Documentation

### Keyboard Shortcuts

*myAvatar* incorporates the use of keyboard shortcuts. Click the *Alt* key displays the *RADplus Utilities 2011* keyboard shortcut keys. Different keyboard combinations may display, depending on the form or widget being displayed.

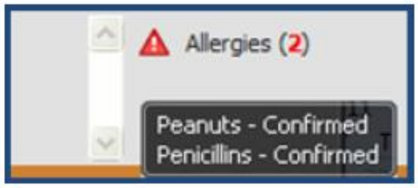

- Click *Alt* to display the keyboard shortcut.
- Clicking the number or letter will display the item. For example, to enable the Search Forms field, click ‘A’.
- Use the keyboard to navigate through the selections.
- Clicking *F5* will clear the selection in a drop down list or radio button field.

## The Chart View

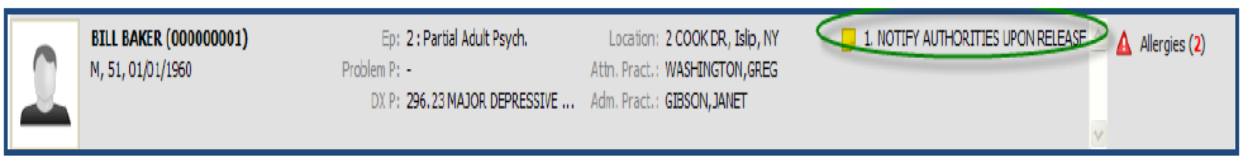
### Client Data Bar & Allergies Display

The *Client Data Bar* displays when a user accesses a client chart. The Client’s Name, Sex, Age and Date of Birth are displayed in the Client Data Bar from within the Chart View. To the far right of the Client Data Bar is the Allergies display.

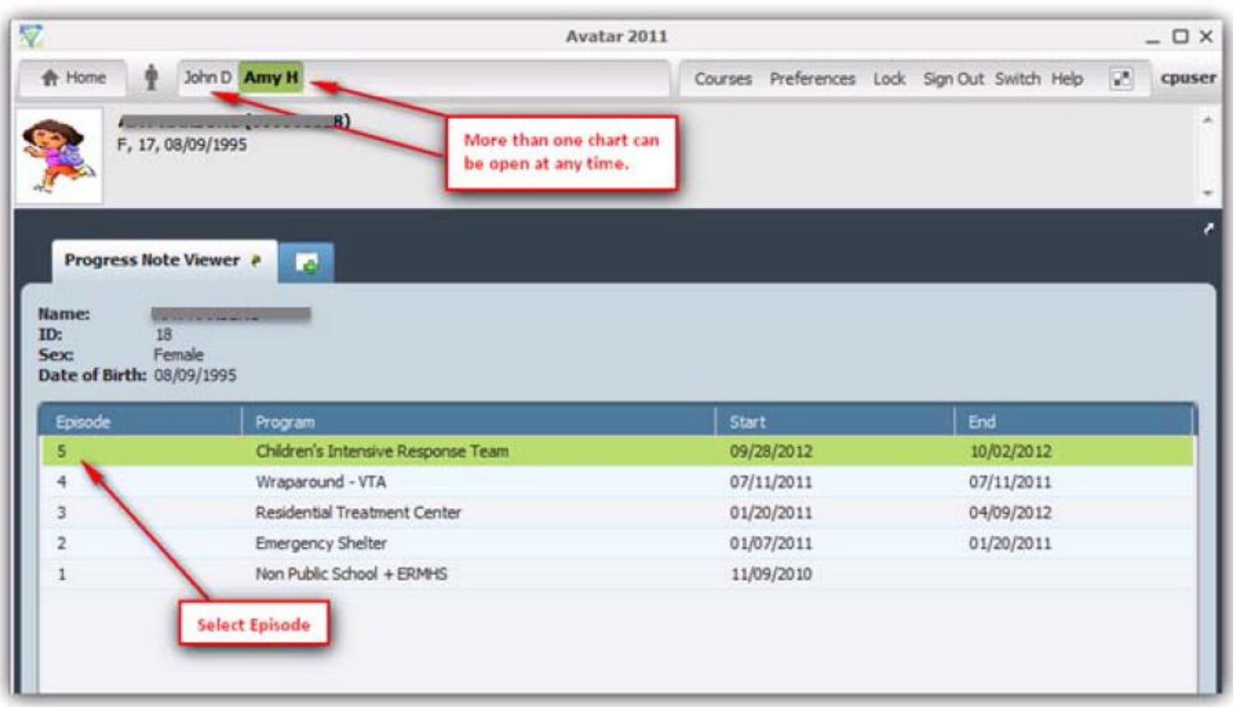
The Allergies display will display in red if there are known allergies entered into the *Allergies and Hypersensitivities Form* within Avatar CWS. Users can bring their mouse over the Allergies display to see a fly over of what Allergies the client has recorded. If there are no Allergies recorded, the display will not have a red alert icon and the number will show as zero.




The Client Data Bar also displays when a user accesses a Form for a specific Client. This area of the screen is dynamic and the information that displays is dependent up on the episode and form that a user is accessing for the client. It will always display a base set of client demographic information and any Client Alerts filed for the client.

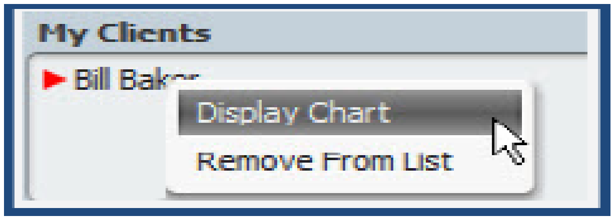



The **Client Information Bar** contains the client's **picture** (if uploaded) and client **demographic information** as well as any **alerts** that were assigned when the patient was admitted and any **allergies** assigned to the client in the **allergies and hypersensitivities** form.

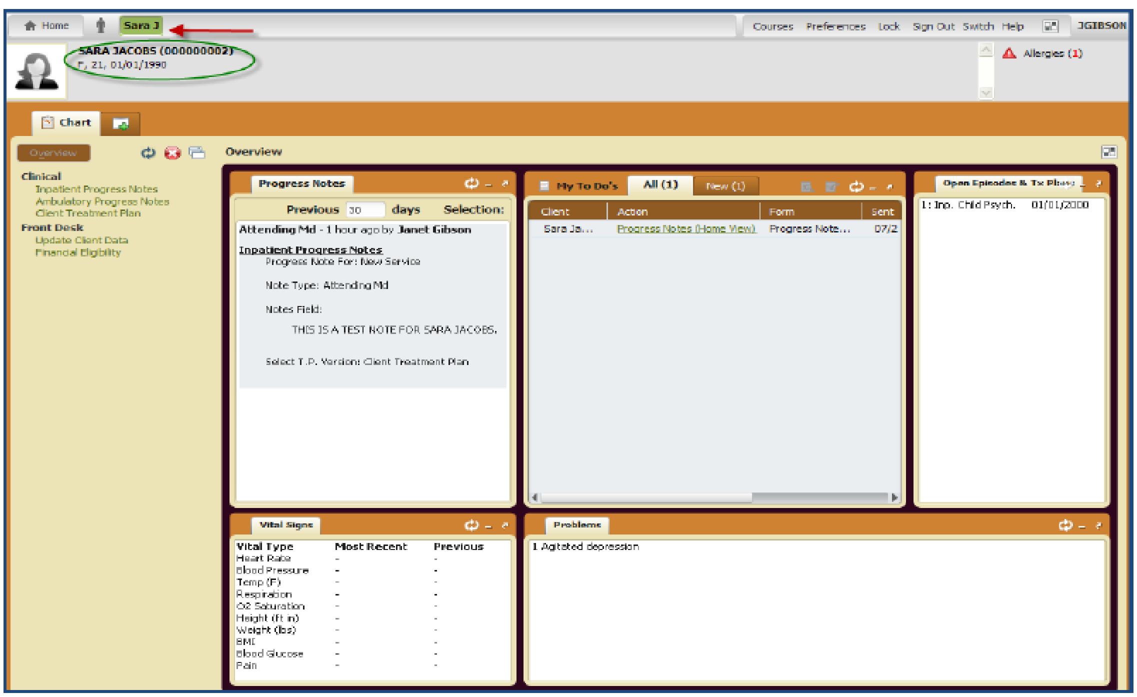


## Chart View

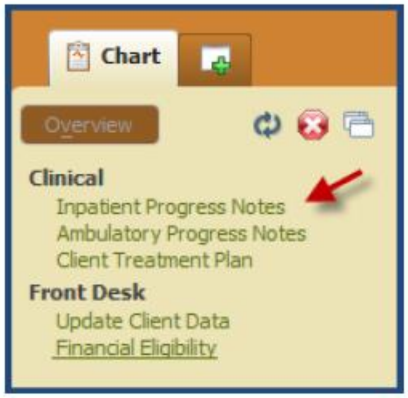
You can access a chart by selecting a client in the *My Clients View* and either right clicking and select *Display Chart* or double clicking on the client's name. The User must be given access to Chart View items within *User Definition* or *User Role Definition* in order to display the client's Chart.

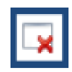



Once a client is selected they will appear on the top bar of the view. Below will also display the client's name, Patient ID, sex, age and date of birth.




The *Chart View* can be designed to contain specific Widgets that will display client specific information when accessing a client's Chart. These Widgets are defined within the Chart View Designer in *User Definition* or *User Role Definition* Forms. The Chart View can also be configured to display a list of Forms where previously filed data can be displayed within the Chart.




- Click this icon to search and add new forms to the Chart View: 
- Click this icon to remove the selected Form from the Chart View: 
- Click this icon to create a new Form Group that will display on the Chart View with the associated Forms beneath it: 
- Click this icon to rename the Form Group: 
- Click this icon to remove Form Group: 
- Click to move Form up in Chart View: 
- Click to move Form down in Chart View 

MyAvatar Quick Tips and Glossary

| Quick Tip | Purpose |
|---|---|
| Control A | Select all items in a multiple select dictionary. |
| Control D | De-select all items in a multiple select dictionary. |
| Tab | Moves the user field to field within the Avatar form. |
| Shift Tab | Moves the user back one field |
|  | This is a date field. You can click the mini calendar to select a date or click T for today or Y for yesterday. You can also enter T+10 to get a date 10 days from now, or Y-10 to get a date 10 days ago. |
| Right Click on drop down dictionary | Some dictionary fields within Avatar will allow the user to "right click" then select Update Dictionary, to add values to be used in the specific field immediately. |
| Name:<br>No spaces before or<br>after the comma's | LAST,FIRST<br>LAST,FIRST JR PUNCUATION- Can use ' and -<br>LAST,FIRST MI |
| Date | MM/DD/YYYY – this format will default based on the date you enter. The date can be entered as M/D/YY or MM/DD/YYYY. Slashes can be replaced during entry with a "-".<br>You can also enter a date by clicking on T or Y or by double clicking in the date field to get a calendar from which you can select the appropriate date. In addition entering T+ #, where # represents the number of days you want added to today's date. |
| Time | To get 8:00 AM/PM – you type 8A or 8P<br>To get 8:30 AM/PM – you type 8:30A or 8:30P<br>Or you can click on "Current" to enter the current time |
| Dollar Amounts | Enter whole dollar amounts without decimal. Enter incremental dollar amounts with decimal and cent amount. Dollar sign, spaces & commas are not required.<br>Examples: Enter 10 for $10.00<br>Enter 10.03 for $10.03 |
| F1 | Displays data element help message |
| F5 | Clears the selected dictionary value from a dropdown box |
| Black | Information not required |
| Red | Information is required.  The system will not allow you to file your forms without this information. |
| Grayed out…not accessible | Information will be defaulted in from another area in Avatar. Although in some instances these may not fill in until a selection is made in an associated field. |

| | | |
|---|---|---|
| Axis of Diagnosis | Diagnosis Entry | Axis I: Clinical syndromes that are focus of the diagnosis. Examples: Obsessive Compulsive Disorder, Dysthymic Disorder, or Panic Disorder, schizophrenia or autism.<br>Axis II: Any permanent, usually genetic condition of the patient, personality disorders that affect the way an Axis I syndrome manifests itself in a patient. For example, a patient with obsessive compulsive tendencies ought to be treated differently if they also suffer from a Schizoid Personality Disorder.<br>Axis III: Medical conditions relevant to the Axis 1 or II diagnoses.<br>Axis IV: Psychosocial and environmental stressors that may affect the clinical syndromes .<br>Axis V: GAF Scores. Global Assessment of Functioning Scale is a relatively subjective score given on a scale between 0 and 100, used to quickly communicate the general mental health of the patient. Every tenth value on the scale correspond to specific criteria, with the numbers in-between representing a more specific assessment of functioning. The higher the score, the healthier the patient. |
| Benefit Plan | Patient Insurance | An entity in Avatar that identifies the types of services being covered as well as any coverage limits. This in conjunction with the Guarantor/Payor selected at the patient level will identify which services are billed and to whom. |
| Billing Outputs | Billing | UB-04: Paper Institutional Claim form<br>HCFA-1500: Paper Professional Claim form<br>ADA: Paper Dental Claim form<br>837 I: 837 Institutional – the HIPAA electronic version of the UB-04 claim form<br>837 P: 837 Professional – the HIPAA electronic version of the HCFA-1500 claim form<br>837 D: 837 Dental – the HIPAA electronic version of the ADA Dental claim form<br>835: Electronic remittance files used to post payments and adjustments based on group/reason codes |
| Closed Accounting Period | Billing Workflow | At month's end , the facility will run a series of billing reports to confirm that Avatar billing is in balance. Once the user confirms the system is in balance the Accounting Period can be closed ensuring the numbers at the facility level will not change moving forward |

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|---|---|---|
| CPT Codes | Service File Build | CPT (Current Procedural Terminology) codes are numbers assigned to every task and service a medical practitioner may provide to a patient including medical, surgical and diagnostic services. They are then used by Payors to determine the amount of reimbursement that the facility will receive. Since everyone uses the same codes to mean the same thing, they ensure uniformity. |
| DSM Codes | Diagnosis File Build | Diagnostic and Statistical Manual of Mental Disorders. These are diagnosis codes that get assigned to the patients. They appear in the billing output and are associated with the services the patient receives. They get cross references in Avatar to ICD-9 codes for purposes of billing. |
| Episode | General | Admission to Discharge. Period of Stay. |
| Financial Eligibility | Patient Insurance | A way to group services for the purposes of reporting. This categorization has no functionality. |
| Group Code | Service File Build | An entity in Avatar to identify the organization (insurance) or person responsible for payment of services. This in conjunction with the Benefit Plan selected at the patient level will identify which services are billed and to whom. |
| Guarantor Nature | Patient Insurance | A category of billing (identified within the Guarantor/Payor set-up) that identifies whether liability should be written off or fall to a different guarantor during liability distribution. |
| HCPCS Codes | Service File Build | Healthcare Common Procedure Coding System. Codes used by Medicare and monitored by CMS, the Centers for Medicare and Medicaid Services. Based on the CPT Codes developed by the American Medical Association, they are assigned to every task and service a medical practitioner may provide to a Medicare patient including medical, surgical and diagnostic services. Since everyone uses the same codes to mean the same thing, they ensure uniformity . |
| ICD Codes | Diagnosis File Build | International Classification of Diseases. The ICD codes are used to classify the diagnoses. It is the ICD associated with the DSM at the patient level that goes out on the billing output, and has an impact on the amount of remittance. |
| Inpatient | Admissions | A scenario where a patient is living at the facility. |
| Interim Billing | Billing Workflow | The process of billing by creating “batches” of patients based on similar billing criteria and identifying the “schedule” by which those batches can be billed. |

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|---|---|---|
| Liability Distribution | Client Ledger | The way the fee of the service distributes to the different guarantors on the client ledger |
| Managed Care Authorizations | Patient Insurance | The ability to track service authorizations by $, Visits or Units |
| Modifiers | Service Entry<br>Service File Build | Modifiers are additional two-digit codes that can be associated with a Revenue, CPT, HCPCS code in the billing output. These identify specific scenarios for the services rendered to the payor and have a direct impact on the amount of remittance |
| Outpatient | Admissions | A scenario where the patient is not living at the facility and comes to the facility to receive specific services. |
| Practitioner | Service Entry | The doctors, clinicians, nurses, nurse practitioners, therapists, etc., responsible for providing services to the patients admitted into Avatar. |
| Practitioner Categories for Coverage | Patient Insurance | Categories used to group practitioners/clinicians based on their billability when rendering services within specific insurance charge categories |
| Program | Admissions | A program is the level of care the patient is admitted into. Services are rendered to the patient based on the program he/she is admitted into. |
| Remittance | Posting Payments | A transaction made to a patient’s account based on the payment or adjustment identified by the guarantor who received the claim. |
| Revenue Codes | Service File Build | Revenue codes are four-digit codes that affect reimbursement and represent the services provided by the facility for a payor. They are only used on a UB-04 or an 837 I file. |
| Revenue Reporting Group | Program File Build | Categories that allow the facility to group programs for purposes of reporting revenue from “like” programs of service |
| Service Code | Service Entry<br>File Build | An entity in Avatar used to identify a billable or non-billable action to be part of the patient’s treatment history. |
| Service Code Cross Reference | Service File Build | Since services are a user defined table, the Service Code Cross Reference is used to identify which Revenue code, CPT/HCPCS code should be used in the billing file. |
| Service Compiles | Service Entry | Processes that allow the user to “compile” information for multiple patients at one time. Ex: Inpatient or Partial Work lists; Roll-up Billing. |
| Service Entry | Billing Workflow | The act of rendering services to patients admitted into Avatar. |
| Service Status | Client Ledger | A service can be in one of three status:<br>**Open:** Service is flexible. Any changes made to the service are made without an audit.<br>**Unbill:** Service is closed. Any changes made to the service will result in an audit. |

| | | |
|---|---|---|
| | | **Claim#:** Service is claimed. |
| Treatment Service | Program File Build | Categories that allow the facility to group patients for reporting purposes – Official Census Report. |
| Treatment Setting | Program File Build | Non-Editable program categories that identify the rules for admissions/billing that Avatar should use for that program. |
| Unit | Service Entry | From a Billing perspective, a Unit is the # of components of a service that were rendered to the patient. |
| Unit | Admissions | From a Practice Management perspective a Unit is an area (floor, building, etc.) where rooms and beds are located. |

Alt - See shortcuts
Alt+S – Client Search
Alt+R – Recent Clients
Alt+M – My Clients
Alt+A – Form Search
Alt+E – Recent Forms
Alt+Y – Recent Forms
Alt+B – Browse Forms
Alt+C – My Calander
Alt+H – Home
Alt+K – Look
Alt+G – Logout
Alt+F – Help

**Keyboard Shortcuts**

| MY AVATAR KEYBOARD SHORTCUTS FRONT DESK HOME VIEW | |
|---|---|
| **Field or Command Name** | **Shortcut Key** |
| Browse Forms | **B** |
| Coming in Today | **F** |
| Help | **P** |
| Lock | **K** |
| My Clients | **M** |
| My Forms | **Y** |
| My Staff (Staff Tab) | **M** |
| Recent Clients | **R** |
| Recent Forms | **E** |
| Recent Staff (Staff Tab) | **R** |
| Search Clients | **S** |
| Search Forms | **A** |
| Search Staff | **S** |
| Sign Out | **G** |
| Sign-out Confirmation "Yes" | **Y** |
| Sign-out Confirmation "No" | **N** |
| Staff Calendar | **F** |

| MY AVATAR KEYBOARD SHORTCUTS CLINICAL HOME VIEW | |
|---|---|
| **Field or Command Name** | **Shortcut Key** |
| Browse Forms | **B** |
| Help | **P** |
| Lock | **K** |
| My Calendar | **C** |
| My Clients | **M** |
| My Forms | **Y** |
| My Staff (Staff Tab) | **M** |
| My To Do's | **T** |
| Recent Clients | **R** |
| Recent Forms | **E** |
| Recent Staff (Staff Tab) | **R** |
| Search Clients | **S** |
| Search Forms | **A** |
| Search Staff | **S** |
| Sign Out | **G** |

| | |
|---|---|
| Sign-out Confirmation "Yes" | **Y** |
| Sign-out Confirmation "No" | **N** |

| **MY AVATAR KEYBOARD SHORTCUTS CHART VIEW** | |
|---|---|
| **Field or Command Name** | **Shortcut Key** |
| Browse Forms Icon Button | **O** |
| Chart Section | **I** |
| Close Chart Icon Button | **C** |
| Customer Chart View Icon Button | **W** |
| Customize Form | **F** |
| Help | **P** |
| Home | **H** |
| Lock | **K** |
| Overview | **V** |
| Refresh Chart Icon Button | **R** |
| Select the Open Client | **1, 2, 3,…** |
| Sign Out | **G** |
| Sign-out Confirmation "Yes" | **Y** |
| Sign-out Confirmation "No" | **N** |

**Helpful Tips**

1. It is easy to make home view and chart views distorted by undocking, re-docking, minimizing, stretching, and closing widgets. Reload Home and Chart Views by using the checkerboard icon, clicking on Reload Home View and clicking on Apply. Views will also be restored when you log off.
2. Client and Staff Widget – Open a form by clicking a client and/or staff once, then clicking a form once (Admission (Outpatient) and MAA are good examples).
3. The Staff section in the Client and Staff Widget will not be populated until Appointment scheduling is implemented.
4. In Preferences, it's important to go to the Chart tab and set a limit to the number of open episodes that are displayed for a client. We recommend a limit of 5. If not, clients who have a lot of episodes will be difficult to display in Chart View.
5. My Forms – My Favorites from the old Avatar will populate into My Forms. You can move items from Recent forms into My Forms. Also, choose the edit button in this widget to show how you can organize "My Forms" the same way you did in the old system
6. Use Shortcuts and Smart Search Features.
7. Use Refresh icon in Widgets in Chart View after new data entry to view the up to date chart.

8. Become familiar with all the icons on Chart View to : Add Client, Home, Overview, Refresh, Close Chart, Customize Forms
9. You can have multiple clients open at one time, the highlighted client name is active.
10. You can add or edit data from Chart View.
11. Know control panel buttons: Submit, Add to Favorites, Close form, Close all forms (does not give a "are you sure warning", Add Client to My Clients (remember, this does not stick).
12. Use the Tab and Arrow Keys to navigate through the Form.
13. You can open multiple forms for a client using the + key.
14. Use Zoom to view data at a closer range.
15. Find client allergies in the Allergies widget in the Chart View. These are accurate as they come from InfoScriber. Allergies in the top right in Client Data Bar are not accurate.

**Frequently Asked Questions**

1. On the Home View, I re-sized some widgets, now I can't find other widgets that were there. How can I return to the basic Home View?

*Answer*: Click on icon (box) on Menu Bar between Help and your Username. This takes you to Preferences/Widgets. Click on Reload Home View. Press Apply. Click on Home View in upper left.

2. How do I get to the Chart View?

*Answer*: Double click on the client name in My Clients, Recent Clients or Search Clients box.

3. How do I get from Chart View back to my Home View?

*Answer*: Click on Home button in upper left.

4. Is F5 the delete/clear function?

*Answer*: Yes

5. Can you accidently remove clients from My Clients permanently?

*Answer*: No you can only remove clients you have temporarily added to My Clients.

6. Will clients that are discharged still show in My Clients?

*Answer*: No, just as with the current Avatar system, only clients with open episodes appear in My Clients.

7. Does spell check wrap to start at top of text field?

*Answer*: Yes, in Preferences/SpellCheck options make sure you check the box "Check spelling from start of text" to enable this feature.

8. Are there accommodations for end-users who are color-blind?

*Answer*: Yes. My Avatar includes a setting for end-users who are color blind. In order to activate that setting, please contact the Avatar HelpDesk. Once this setting is activated, the red required fields appear in bold print. In addition, a black border appears on active fields that user is entering data entry in.

9. Can we access other program's episodes?

*Answer*: Yes, if you have that access now. Your user privileges will not change with My Avatar.

10. We have problems with other facilities closing episodes incorrectly – how can we prevent that?

*Answer*: NO ONE should be closing any episode other than their own.

11. Will clients that need PFI be on a report or a widget?

*Answer*: This information is found on reports, just as now. For an individual client, you may search for client, highlight then choose PFI from forms to display the PFI for each episode.

12. Can you import PFI from other episodes?

*Answer*: Yes, you can link financial information from one episode to another.

13. Chart View – if you delete a form by mistake, does it automatically refresh when you log off.

*Answer*: No, you have to add it back.

14. How can I recover if lost in re-sizing, minimizing widgets?

*Answer*:

**In Home View** – If you have re-sized or lost some widgets and you just want to return to the default view, click on the checkerboard icon at top right. You are now in "Customize Widgets" form. Go to bottom left of form, click on "Reload Home View". You are prompted to confirm reload. Click yes and click on "Apply". Your original View re-appears.
**In Chart View** – If you have re-sized or lost some widgets and you just want to return to the default view, hover over the checkerboard icon at top right of the chart (not the form) to find "Customize Chart View". Click on the icon. Go to bottom left of form, click on "Reload Chart". You are prompted to confirm reload. Click yes and click on "Submit". Your original View re-appears.

15. What does the Overview button do?

*Answer*: Press to revert back to chart view after chart inquiry