My Avatar
Self-Training Guide

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San Francisco Department of Public Health
Community Behavioral Health Services
1380 Howard Street
San Francisco, CA 94102

For information and updates, please contact the Avatar HelpDesk
Telephone: 415.255.3788
E-mail: avatarhelp@sfdph.org
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Appendix One: Keyboard Shortcuts
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Chapter One: Introduction to My Avatar

Welcome to the My Avatar Self-training Guide. The goal of this manual is to provide you with information about the new features in My Avatar and to help you learn how to use them. Along with the new functionality comes new terminology. Chapter One presents an overview of new features, along with the most commonly used new terms and definitions in My Avatar. Learning the new terminology will assist you in using this Guide more effectively. The My Avatar Guide begins with an overview of all new features. In Chapter Three, you will log in to My Avatar and see the new features and navigational tools for yourself.

What is My Avatar?

My Avatar is the newest version of the Avatar product that provides a more convenient and user-friendly interface than the current version. There are many new features available which will enhance use of the Avatar system for all end-users. In many cases you can access specific client information immediately in Home and Chart Views without running a report.

We are confident that once you learn the basics, you will be pleased with the new look and feel of My Avatar. Two things that many new end-users find most helpful are:

- Widgets – Critical information is presented immediately in Home and Chart Views without running a report.
- Improved navigational tools – Smart search, shortcut keys, scrolling, tab key, and zoom are tools designed to make access to information faster and easier – and to limit use of the mouse.

With experience, you will find features and tricks that are most helpful for your unique use of My Avatar. Please share them with the Advanced Users at your program and your co-workers.

When does My Avatar begin?

SF CBHS goes LIVE with My Avatar on Monday, October 8, 2012. On that day, the old interface is gone, replaced with the new My Avatar interface. All data in the old system will be present in the new system; but the face of Avatar will look different. Once the transition is complete on October 8, everyone who uses Avatar will automatically be converted to My Avatar. There is no going back to the old version of Avatar.

What features remain the same from the old Avatar?

- How you login stays the same: Same System Code, same Username, same Password.
- If you sign in via webconnect, process and passwords remain the same.
- Names of forms remain the same.
- The type of data you enter to a form remains the same.
- All assessments, treatment plans, progress notes, admissions, financial eligibility, etc. still include the same data elements as the previous version of Avatar.
- The same items that were required (in red) previously are still required under My Avatar.
• The layout of data elements for assessments, treatment plans, progress notes and all other forms remains the same, with the exceptions noted above ("sections" replace old "tabs", "scrolling" replaces "pages").
• Light bulb functionality and text stay the same.
Chapter Two: Overview of New Features

Home View

The first thing you will notice upon logging in is your “Home View”. The Home View is tailored to the needs of various types of staff/functions, and contains critical information you need as you start your day. Program staff are assigned either the Front Desk View or the Clinical View.

- **Front Desk Home View** – The Front Desk View is designed for personnel that primarily admit clients, schedule appointments and perform other administrative functions. It facilitates quick access to client data for updates.
- **Clinical Home View** – The Clinical Home View allows clinical staff to manage their caseload and view their To Do list and Calendar. Also, the clinician can easily move from the Clinical Home View to the Chart View, with access to detailed clinical information for an individual client.
Chart View

Chart Views provide a more detailed look at information specific to a client. Double click on a client name to move immediately to the client’s chart. Just as with Home Views, Chart Views come in two flavors – Front Desk Chart View and Clinical Chart View. Access to information contained in these views is strictly controlled by behind the scenes user privileges.

- **Front Desk Chart View** – Administrative and/or intake staff may be able to access specific client information via the Front Desk Chart View, dependent on the individual end-user’s privileges.
• **Clinical Chart View** – From the Clinical Home View, clinicians can easily access the Chart View, an interactive form that displays a client’s electronic health record. The most commonly viewed information is available here – all on a single form. No need to run a report to get the information – it appears quickly when you select the client’s Chart View. For a selected client, the Chart View contains information about client demographics, open episodes, medications, and progress notes.
Widgets

Widgets are boxes containing functions (such as Search Clients) or a quick snapshot of information (such as Client Episodes). A collection of Widgets make up Home and Chart Views. They contain the most commonly accessed functions and information. Widgets are designed to: display valuable information to the user, on one form, and fast!

Navigation

My Avatar includes several methods for navigating through forms quickly and is designed to minimize use of the mouse. Numerous keyboard shortcuts are embedded to focus the cursor on a specific field using a single keystroke. Press the Alt key to display shortcuts. Appendix One contains a comprehensive list of keyboard shortcuts.

On-line Documentation

Online documentation is easily accessible from any form. The link to Online Documentation is located on the left bar of the form display. When selected, documentation opens in a new browser window to the section and provides information for use of the form the user has open.

Terminology

Some commonly used terms used in Avatar have changed. This manual uses the new terminology. See the table below for old and new terms for equivalent functionality. Appendix Two contains a comprehensive list of new terminology.

<table>
<thead>
<tr>
<th>Old Term</th>
<th>New Term</th>
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<tbody>
<tr>
<td>Option</td>
<td>Form</td>
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<tr>
<td>Tab</td>
<td>Section</td>
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<tr>
<td>Page</td>
<td>Subsection</td>
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<tr>
<td>My Caseload</td>
<td>My Clients</td>
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<td>My Favorites</td>
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<td>Chart Review</td>
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<td>Login/Logout</td>
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<td>To Do List</td>
<td>My To Do’s</td>
</tr>
<tr>
<td>Help/Search for Option</td>
<td>Search Forms</td>
</tr>
</tbody>
</table>
Chapter Three: My Avatar Test Drive

Now it’s time to Sign In to My Avatar so you can see the benefits of the improved interface for yourself.

Sign In Please!

Accessing the DPH Network
If you use a token, follow the same procedures you are familiar with. This does not change with My Avatar.

Avatar Sign In Steps
1. Double click on the Avatar icon.
2. On the AVATAR page, click the Start Avatar button.
3. On the Avatar Sign In page, enter information in the three boxes shown below.
   - System Code: Same as before My Avatar
   - User ID: Same as before My Avatar
   - Password: Same as before My Avatar
4. Click on Sign In button.

New Look and Feel

As soon as you sign in, instead of seeing a lot of white space (which is what you saw in the old Avatar at login), you see your Home View. There are two Home Views:

- Front Desk for admissions/intake staff
- Clinical – for clinical staff

A Home View was assigned to you based on the user privileges you have in Avatar.
The Home View provides a quick snapshot of information that is important to your daily work. See more detailed information about your particular Home View in chapters that follow.

The remainder of this chapter describes various new icons and buttons you see on forms, the new Menu Bar, and new navigational tools to help you move within a form or across forms quickly and easily. Detailed information contained in each widget in your Home View is provided in subsequent chapters.

**Home button**
The green button at top left is your Home button. From any form, you can press this button to immediately return to your Home View.

**Oscar (Person) button**
Press this button from any form to view My Clients, Recent Clients or select a new client.

**Menu Bar**
The Menu Bar is displayed at the top right of each form. The Menu Bar contains functions you will need while you are working in My Avatar. A brief description of each function follows.

- **Courses** – Not in use.
- **Preferences** – This form allows the user to define some basic functionality. Most end-users will set up a few basic preferences on initial login to My Avatar. After initial setup, you only need to access preferences if conditions change. The only preference you need to set up when you first begin using My Avatar is “Chart”. See recommendations for setup below.
  - Spell checking – We recommend Standard, which is the default. Choices are Standard or Microsoft Word spell check. Also, under Options, we recommend checking the box to “Check spelling from start of text”. If this is not checked, spell checking will start at the cursor mark.
  - Printer – You do not need to define which printer to use when printing Avatar reports or other information. Selection automatically defaults to your default printer.
  - Themes – We recommend the Default. Other color schemes are available. To enable a new color scheme, logout of My Avatar, close the browser and re-start.
  - Calendar – If you want to include personal appointments in the Avatar calendar display, press Add Source button to add a new calendar source. Sources that are supported by the application are limited to My Outlook, Microsoft Exchange and Gmail. Note: While this functionality is available now, you are on your own. We are not supporting the upload of personal appointments until the Appointment Scheduling module is implemented.
  - Widgets – This function is available to end-users for only one action – Reload Home View button at bottom left. If you have re-sized widgets and appear to have lost other widgets, click on Reload Home View to restore the default widgets. Then, click on Apply.
  - Chart – User may define data to appear within Chart View. We recommend
    - Selecting Open (not All) episodes to display.
- Limit number of records to list to 5.

- **Lock** – This function works just like it did before My Avatar. To maintain client confidentiality and security, we highly recommend that you either Lock your PC if you have to leave your work station, or Sign Out.

- **Sign Out** – Click on this button to exit My Avatar.

- **Switch** – For those users with more than one system code, you may use this feature to move between system codes. As you click on this button, you are returned to the Log in form, where you enter a different system code. Do not use this feature to Sign Out.

- **Help** – Provides a link to the Netsmart Help Manual.

- **Checkerboard Icon** – This is a quick path to Preferences/Widgets. Main purpose is quick access to Reload Home View. Then, click on Apply.

**Username**
The name of the end-user currently logged in to My Avatar appears to the right of the Menu Bar.
Navigation

Smart Search
Smart search dynamically displays all results as you type in the search criteria. All results conforming to the criteria display. As more information is entered into the search prompt, the results are refined. Smart Search feature is available when searching for clients, staff or forms within My Avatar. See figure below for an example of smart search.

- When searching for clients or staff, type the last name. The drop down list will display the client or staff meeting the search criteria.
- Select the client by double clicking on the name or by using the arrow keys to move to the desired client and pressing Enter.
Short Cut Keys
Press the Alt key to display letter/number shortcuts you can use instead of using the mouse to navigate to a specific item. Clicking the number or letter will immediately move the cursor to that section. See figure below for example of short cut keys. Also, see appendix 1 for full list of short cut keys.

Sizing/Minimizing/Un-docking/Re-docking
Widgets can be re-sized as needed to display more of the information in one widget, while reducing the size of an adjacent widget. For example, in your Home View, you may want to view more of the To Do’s widget and less of the Did you know? widget.

Hover over the area at the top right of a widget to see what options are available. The functionality of each icon is described below.

Re-size – To change the size of a widget, hover over the edge of the widget you want to increase. When you see the double-headed arrow appear, right click and hold. To increase box horizontally, click and hold a left or right edge and move left or right. To increase box vertically, click and hold a top or bottom edge and move mouse up or down.
Minimize – To remove a widget temporarily from view, click on the minus sign (-) at the top right of the widget. The widget moves to a bar at the bottom of the form. To restore the widget, find the widget label at the bottom of your form, click on the Restore icon.

Un-dock – Use this feature to free the widget from its normal position in the form. Click on crooked arrow facing up and right to free the widget. Once free, it will appear on other forms you access.

Re-dock – To return a free widget to its mooring, click on the arrow facing down and left.

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.

If Lost 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.
Chapter Four: Front Desk Home View Up Close

Clinic staff who admit clients, perform financial eligibility screening, and other typical “Front Desk” duties see the Front Desk Home View when they log in. Key features of the Front Desk Home View are shown in the picture below. The numbers in the picture refer to the numbering in the descriptions/instructions beneath the picture.

1. **Forms & Data** widget includes various ways to access forms. This widget is also immediately accessible from any view or form by pressing the icon that resembles a white paper with a plus sign.

   - **My Forms** – Displays what used to be called My Favorites. Your My Favorites in the current version of Avatar will be imported to My Avatar. To add (or remove) forms to My Forms, select ‘edit’ at top right of the widget and search for the form to add.
   - **Recent Forms** – Shows the forms that you have used during the current session. This list resets on log out. You can drag and drop a form from Recent Forms to My Forms for easy access in the future.
   - **Search Forms** – Find forms and reports using Smart Search. Once you have located the form you want, either double click on the form or highlight the form and press Enter to select.
• **Browse Forms** – Use this method to access forms via the regular menu structure. Click on the application you wish to Browse. The menu structure appears allowing you to navigate to the desired form.

2. **Did you know?** – This widget displays messages regarding new features and tips related to My Avatar. This information is automatically populated from Netsmart Technologies, the vendor.

3. **Client & Staff** widget contains both display and search functions.
   - **My Clients** – Shows your current caseload.
   - **Recent Clients** – Shows clients that you have worked on during your current My Avatar session. You may remove clients from the list by pressing “right click” on your mouse and removing, any clients remaining on your list will be removed when you Sign Out.
   - **Search Client** – Allows you to search for clients. It performs a smart search in order to facilitate the process of finding your clients.

   *Note*: Additional functionality will be available for the **Staff** tab when Appointment Scheduling is implemented.

4. **Message Center** – Used to communicate important information such as: release of a new report, system updates, system down-time for maintenance purposes, etc.

5. **Appointments** widget is not fully functional at this time. When the Appointment Scheduling module is implemented in 2013, it will display your appointments for the day. Currently, you may load your calendar from an external source. Current options available are My Outlook, MS Exchange and Gmail.

   *Note*: AvatarHelp does not support use of My Calendar widget or the download from an external source at this time.
Chapter Five: Clinical Home View Up Close

Clinicians see the Clinical Home View at login. Key features of the Clinical Home View are shown in the picture below. The numbers in the picture refer to the numbering in the descriptions/instructions beneath the picture.

1. Client & Staff widget contains both display and search functions.
   - My Clients – Shows your current caseload.
   - Recent Clients – Shows clients that you have worked on during your current My Avatar session. You may remove clients from the list with “right click” on your mouse and selecting remove. Clients remaining on your list will be removed when you Sign Out.
   - Search Client – Allows you to search for clients. It performs a smart search in order to facilitate the process of finding your clients.

   Note: Additional functionality will be available for the Staff tab when Appointment Scheduling is implemented.

2. Did you know? – This widget displays messages regarding new features and tips related to My Avatar. This information is automatically populated from Netsmart Technologies, the vendor.
3. **Message Center** – Used to communicate important information such as: release of a new report, system updates, system down-time for maintenance purposes, etc.

4. **Forms & Data** widget includes various ways to access forms. This widget is also immediately accessible from any view or form by pressing the icon that resembles a white paper with a plus sign.

   - **My Forms** – Displays what used to be called My Favorites. Your My Favorites in the current version of Avatar will be brought over to My Avatar. To add (or remove) forms to My Forms, select ‘edit’ at top right of the widget and search for the form to add.
   - **Recent Forms** – Shows the forms that you have used during the current session. This list resets on log out. You can drag and drop a form from Recent Forms to My Forms for easy access in the future.
   - **Search Forms** – Find forms and reports using Smart Search. Once you have located the form you want, either double click on the form or highlight the form and press Enter to select.
   - **Browse Forms** – Use this method to access forms via the regular menu structure. Click on the application you wish to Browse. The menu structure appears allowing you to navigate to the desired form.

5. **My To Do’s** widget allows you to manage your To Do items, providing more information in a clear format. You may also select All or New To Do items for display.

6. **My Calendar** widget is not fully functional at this time. When the Appointment Scheduling module is implemented in 2013, it will display your appointments for the day. Currently, you may load your calendar from an external source. Current options available are My Outlook, MS Exchange and Gmail.

   **Note:** AvatarHelp does not support use of My Calendar widget or the download from an external source at this time.
Chapter Six: Chart View Basic Functionality

The Chart View provides a snapshot of clinical information about one client. A clinician moves from the Clinical Home View to the Chart View by selecting/doubleclicking a client in My Clients, Recent Clients, or Search Clients box. Return to the Home View by clicking on the Home View button in upper left corner of the form. Key features of the Chart View are shown in the picture below. The numbers in the picture refer to the numbering in the descriptions/instructions beneath the picture.

1. Information Bar – Contains Home button, Oscar (Person) button which are both described in detail in Chapter 3. In addition, you may see:
   - Client name of open charts. Note, the highlighted chart is the active chart.
   - Open forms are also displayed here.

2. Client Data Bar – Once a client is selected, demographic information appears on the top bar of the view – Name, id number, gender, age, birth date.
3. **Allergies** – This information is NOT valid. To find valid allergy information, see the Allergies widget in Chart View.

4. **Plus (+) sign** – Click this icon to search/select a form.

5. **Chart Forms List** – At left hand side of chart view is a list of forms a clinician is most likely to review for a client, such as assessments, diagnosis, treatment plan of care, medication history, etc. Here you also see items that are:
   - Out of compliance, indicated by a red arrow
   - In compliance, indicated by a black arrow
   - Abstracts – a version of a client based report

Users are assigned a customized list of chart items in the Form Tree based on the type of clients you work with, so every clinician will not have the same set of items. Specific roles/lists include:
   - MH Adult
   - MH CYF
   - MH Adult and CYF
   - SA Adult
   - Adult CYF
   - SA Adult and CYF
   - MH and SA Adult and CYF
   - Residential

6. **Chart Icons** – Click an icon to perform these functions:
   - Refresh Chart View – To display most currently entered information. This is especially useful when you are adding new information into Forms while in Chart View.
   - Exit Chart View – To leave Chart View display.
   - Customize Forms – Don't touch!
   - Overview button – When viewing Form data included in Chart View, use this button to return to the original Chart View display
Chapter Seven: Front Desk Chart View Up Close

Widgets

Following is a description of information contained in each widget in the Front Desk Chart View.

1. **Client Episodes**— A list of episodes, including episode number, program, admitting practitioner, attending practitioner, admit date, discharge date, primary diagnosis. Depending on your setup in My Preferences, the list of episodes may included only open episodes, or both open and closed episodes.
Chapter Eight: Clinical Chart View Up Close

Widgets

Following is a description of information contained in each widget in the Clinical Chart View.

1. **Client Episodes**– A list of episodes, including episode number, program, admitting practitioner, attending practitioner, admit date, discharge date, primary diagnosis. Depending on your setup in My Preferences, the list of episodes may included only open episodes, or both open and closed episodes.

2. **Progress Notes** – Detailed progress notes (both draft and final status) are displayed here for the chart that is open. User may select the number of days of progress note history to display, and the type of notes displayed (all notes, my notes, medication notes, etc.)
3. **Allergies** – Allergy name, date allergy noted, name of medication, name of prescriber who noted the allergy. This information is entered via InfoScriber and brought over to My Avatar.

4. **Current Medications** – Name of medication, dosage and prescription date. This information is entered via InfoScriber and brought over to My Avatar.
Chapter Nine: Chart Inquiry Screen

Click on an item from the Forms List on the left side of the display to view a snapshot of clinical information currently on file for a client. For example, if you want to see the diagnosis for the client that appears in the Information Bar, click on Diagnosis in the Forms List. Core information about the diagnosis appears in the chart inquiry screen. Use the scroll bar to view prior diagnoses. Each episode will have its own chart inquiry tab, the user can toggle back and forth to view data, such as diagnoses across episodes.

Note that you can also add new, edit, or print the data via hyperlinks at the far right.

See the picture below for a sample of what a typical chart view item looks like.

1. To go back to the Home View, Click Home.
2. Active Client is highlighted here. Users can have multiple clients open in the Information Bar.
3. Click the Overview button to go back to client’s primary Chart View page.
4. Click Diagnosis to see what is on file for the client.
5. Notice that the episodes for the client are listed in separate tabs. Be sure to identify the correct episode that you want to view and/or work with.
6. You have the option to add a new Diagnosis. This works for all forms in Chart Forms List.
7. Results appear for all Diagnosis information. Notice the bar in the middle separating the different diagnosis records.
8. You can zoom in or out to the desired size.
Chapter Ten: Accessing Forms

Forms in My Avatar such as Admission, Discharge, Assessments, and Progress Notes, are the same as in old Avatar in terms of data collected, general layout, and required fields.

To enter data in a form for a client, start at the Clinical Home View or the Chart View. First select your client, then select the form. The form appears ready to enter data for your client. To update or review data already entered in a form, perform the same process. The form displays with information previously entered.

See picture below for a sample layout of what a typical form looks like. Note the various Sections (that replace tabs), how to submit a form, and other icons that represent functions such as print, close without submitting, etc. Hover over the icon to see what it represents. More detailed explanations are shown below, along with descriptions of navigational tools.

1. Active Client Name is Highlighted
You may have multiple clients open. The client that you are working on is highlighted.
2. Sections replace Tabs
On a form, instead of “Tabs” across the top that define different types of data collected, a list of “Sections” is displayed on the left side of the form. Click on the Section you want to go to.

3. Control Panel
• Submit – Press this button once you have completed entering data to the form.
• Add form to My Forms – Select to add this form to My Forms if you use it frequently.
• Close form – To close without saving changes.
• Print form – To print to your default printer.
• Close all forms for this client – If you have multiple forms open for this client and you are finished working with this chart, press this button to close all without saving changes.
• Add client to My Clients – For this session, you may add the client to My Clients. If the client is not on your caseload, s/he will be removed from My Clients at Sign Out.

4. Scrolling replaces Pages
Until now, forms that collect a large amount of information required the user to click the arrow keys to “page” through several pages in order to enter all required data. “Paging” has been replaced with the more commonly used method of “Scrolling” through a document.

5. Tab key to move to next field
Use the Tab key to move to the next field on your form. This alleviates over-use of the mouse.

6. Arrows to scroll up and down
Use the up and down arrow keys to scroll through a Form, again a feature designed to minimize the use of the mouse.

7. Zoom
Do you have difficulty seeing the details in a form? You can change the size of text and fields in a form using the Zoom feature. 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 and move to right to increase size, left to decrease.
• Click the plus or minus buttons.
• Click the zoom level to display the zoom level screen, select a zoom percentage or custom, then click OK.

Note that the zoom setting for a form is saved even after exiting the form or logging out.
8. **DRAFT water marks**
Progress Notes and Assessments that are in draft status display “DRAFT” water marks in the background, assisting clinicians to easily discern when a document is in draft. See figure below for an example.
Chapter Eleven: Top 13 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.

6. Become familiar with all the icons on Chart View to: Add Client, Home, Overview, Refresh, Close Chart, Customize Forms.

7. You can have multiple clients open at one time, the highlighted client name is active.

8. You can add or edit data from Chart View.

9. 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).

10. Use the Tab and Arrow Keys to navigate through the Form.

11. You can open multiple forms for a client using the + key.

12. Use Zoom to view data at a closer range.

13. 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.
Chapter Twelve: 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 still the delete/clear function?
   
   Answer: Yes

5. Can you accidentally 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: PFI will become centralized in December but as of now the functionality is the same as old Avatar.

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. Will we have to redo our favorites?
Answer: No they will migrate over to My Avatar.

15. 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.

16. What does the Overview button do?
Answer: Press to revert back to chart view after chart inquiry

17. What does Customize forms do?
Answer: Don’t try this at home!
## Appendix One: Keyboard Shortcuts

### MY AVATAR KEYBOARD SHORTCUTS

#### FRONT DESK HOME VIEW (Fig. 1)

<table>
<thead>
<tr>
<th>Field or Command Name</th>
<th>Shortcut Key</th>
</tr>
</thead>
<tbody>
<tr>
<td>Browse Forms</td>
<td>B</td>
</tr>
<tr>
<td>Coming in Today</td>
<td>F</td>
</tr>
<tr>
<td>Help</td>
<td>P</td>
</tr>
<tr>
<td>Lock</td>
<td>K</td>
</tr>
<tr>
<td>My Clients</td>
<td>M</td>
</tr>
<tr>
<td>My Forms</td>
<td>Y</td>
</tr>
<tr>
<td>My Staff (Staff Tab)</td>
<td>M</td>
</tr>
<tr>
<td>Recent Clients</td>
<td>R</td>
</tr>
<tr>
<td>Recent Forms</td>
<td>E</td>
</tr>
<tr>
<td>Recent Staff (Staff Tab)</td>
<td>R</td>
</tr>
<tr>
<td>Search Clients</td>
<td>S</td>
</tr>
<tr>
<td>Search Forms</td>
<td>A</td>
</tr>
<tr>
<td>Search Staff</td>
<td>S</td>
</tr>
<tr>
<td>Sign Out</td>
<td>G</td>
</tr>
<tr>
<td>Sign-out Confirmation &quot;Yes&quot;</td>
<td>Y</td>
</tr>
<tr>
<td>Sign-out Confirmation &quot;No&quot;</td>
<td>N</td>
</tr>
<tr>
<td>Staff Calendar</td>
<td>F</td>
</tr>
</tbody>
</table>

#### CLINICAL HOME VIEW (Fig. 2)

<table>
<thead>
<tr>
<th>Field or Command Name</th>
<th>Shortcut Key</th>
</tr>
</thead>
<tbody>
<tr>
<td>Browse Forms</td>
<td>B</td>
</tr>
<tr>
<td>Help</td>
<td>P</td>
</tr>
<tr>
<td>Lock</td>
<td>K</td>
</tr>
<tr>
<td>My Calendar</td>
<td>C</td>
</tr>
<tr>
<td>My Clients</td>
<td>M</td>
</tr>
<tr>
<td>My Forms</td>
<td>Y</td>
</tr>
<tr>
<td>My Staff (Staff Tab)</td>
<td>M</td>
</tr>
<tr>
<td>My To Do's</td>
<td>T</td>
</tr>
<tr>
<td>Recent Clients</td>
<td>R</td>
</tr>
<tr>
<td>Recent Forms</td>
<td>E</td>
</tr>
<tr>
<td>Recent Staff (Staff Tab)</td>
<td>R</td>
</tr>
<tr>
<td>Search Clients</td>
<td>S</td>
</tr>
<tr>
<td>Search Forms</td>
<td>A</td>
</tr>
<tr>
<td>Search Staff</td>
<td>S</td>
</tr>
<tr>
<td>Sign Out</td>
<td>G</td>
</tr>
<tr>
<td>Sign-out Confirmation &quot;Yes&quot;</td>
<td>Y</td>
</tr>
<tr>
<td>Sign-out Confirmation &quot;No&quot;</td>
<td>N</td>
</tr>
</tbody>
</table>

#### CHART VIEW (Fig. 3)

<table>
<thead>
<tr>
<th>Field or Command Name</th>
<th>Shortcut Key</th>
</tr>
</thead>
<tbody>
<tr>
<td>Browse Forms Icon Button</td>
<td>O</td>
</tr>
<tr>
<td>Chart Section</td>
<td>I</td>
</tr>
<tr>
<td>Close Chart Icon Button</td>
<td>C</td>
</tr>
<tr>
<td>Customer Chart View Icon Button</td>
<td>W</td>
</tr>
<tr>
<td>Customize Form</td>
<td>F</td>
</tr>
<tr>
<td>Help</td>
<td>P</td>
</tr>
<tr>
<td>Home</td>
<td>H</td>
</tr>
<tr>
<td>Lock</td>
<td>K</td>
</tr>
<tr>
<td>Overview</td>
<td>V</td>
</tr>
<tr>
<td>Refresh Chart Icon Button</td>
<td>R</td>
</tr>
<tr>
<td>Select the Open Client</td>
<td>1, 2, 3,...</td>
</tr>
<tr>
<td>Sign Out</td>
<td>G</td>
</tr>
<tr>
<td>Sign-out Confirmation &quot;Yes&quot;</td>
<td>Y</td>
</tr>
<tr>
<td>Sign-out Confirmation &quot;No&quot;</td>
<td>N</td>
</tr>
</tbody>
</table>
NOTE: You must press the "Alt" key first and release before pressing the shortcut key. But don't press the "Alt" and shortcut keys at the same time.

FIGURE 1: FRONT DESK HOME VIEW
FIGURE 2: CLINICAL HOME VIEW

FIGURE 3: CHART VIEW
## Appendix Two: Terminology/Crosswalk

<table>
<thead>
<tr>
<th>Old Term</th>
<th>New Term</th>
</tr>
</thead>
<tbody>
<tr>
<td>Option</td>
<td>Form</td>
</tr>
<tr>
<td>Tab</td>
<td>Section</td>
</tr>
<tr>
<td>Page</td>
<td>Subsection</td>
</tr>
<tr>
<td>My Caseload</td>
<td>My Clients</td>
</tr>
<tr>
<td>My Favorites</td>
<td>My Forms</td>
</tr>
<tr>
<td>Chart Review</td>
<td>Chart View/Chart Overview</td>
</tr>
<tr>
<td>Login/Logout</td>
<td>Sign In/Sign Out</td>
</tr>
<tr>
<td>To Do List</td>
<td>My To Do's</td>
</tr>
<tr>
<td>Help/Search for Option</td>
<td>Search Forms</td>
</tr>
</tbody>
</table>