

Accessing & Installing Avatar Thursday, October 9, 2014 - 10:30 - 12:00 pm



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### How does an Agency gain access to Avatar?

who are the users
what paperwork is needed?
what are the training requirements?
how does Avatar get installed on my computer?
who supports Avatar after installation?



## Identifying Users

 MH Contractors utilize Avatar PM (Practice Management) & parts of CWS (Clinical Workstation)

 Episode Opening, Closing, Update Client Demographics, Inputting Client TX Plan & Assessment Dates, Printing Reports

**Types of Users** 

- Contractor Admin
   Contractor Manager
- Contractor Clinician
- Lookup Only

## Types of Users

#### Contractor Admin

• Contractor Manager

Contractor Clinician

Lookup Only

- Access to all mental health clients, episode opening & closings, reports, view progress notes & assessments, update demographics
- Access to all clients, Reports, view progress notes & assessments, and Client caseloads
- Access to their caseloads, view progress notes & assessments & print reports
- Access to view only client info & print reports

### What paperwork is needed?



After Identifying your users the following paperwork is required for all users, regardless of user type

Paperwork can be found at: http://www.smchealth.org/bhrs/providers/AvatarAccess

- BHRS MH Credentialing Form
- BHRS eCC Signature Form
- Remote Access Request
  - For Look Up Only Lookup only Declaration Notice, Remote Access Request & Credentialing Form

For Billing/Therapist Number only – Credentialing Form only

### **Completing the Paperwork**



#### <u>BHRS Credentialing Form</u>

- Requesting Therapist/Billing Number, Avatar Request, Location, Name change, License Status change & Terminations
- <u>BHRS eCC Signature Form</u> -<u>Request for Lookup Only Access</u>

\* these 3-forms can be e-mailed or faxed

#### Remote Access Request

must be mailed (Original signatures needed)
 Alys C. Herring
 BHRS
 225 37<sup>th</sup> Ave, 3<sup>rd</sup> Floor
 San Mateo, CA 94403



## Training Requirements

All users are required to complete two (2)- online trainings http://www.smchealth.org/bhrs/providers/ontrain

- 1. Introduction to the BHRS Avatar Electronic Medical Record
- 2. BHRS Confidentiality & HIPAA for Mental Health & AOD (to be completed Annually)

Also, Attend 3-hour in-person, hands on training (offered monthly)

## User Accounts

After users have completed all paperwork & training requirements they will be sent their Avatar & Remote Access Accounts (VPN)

(VPN/s are sent to users from a different county dept. User should check spam to make sure email hasn't been caught in spam. Users have 30-day to activate VPN once email has been received)

### Important Numbers

Avatar Helpdesk – 650-573-3400 (To reset Avatar & VPN passwords)







# Any Questions?



Supervisors

Thank you for attending

Next Webinar - Wednesday, October 15, 10:00 – 11:30 am Client Lookup, Episode Openings & Closings, Updating Client Demographics

questions can be sent to <u>aherring@smcgov.org</u> Or 650-573-3538



### Installing Avatar – For IT Support (New Agencies Only)

# Agencies identified as needing Avatar were sent CD's with all the required Avatar Installation files



If you are going to install on a computer as we go through the process, go ahead and put the cd in

#### Your CD should contain the follow: 32-bit File Folder

- 1. DocView16.Zip
- 2. AvatarPOS 32.zip
- Cache2010\_Rad2011 for XP \_Win7 32 bit.zip (includes Reportviewer11)
- 4. Windows XP VPN Client v 5.0.02

64 Bit File folder:

- 1. DocView16.Zip
- 2. AvatarPOS .msi
- 3. Cache.2010 Driver for Win 7 64bit.zip (includes Reportviewer11)
- 4. CiscoVPN64bit.exe

### Hardware Current Recommendations

- User's Computer (Minimum)
- Processor 1 gigahertz (GHz) or faster 32-bit (x86) Operating System Windows 7, RAM 1 GB or greater
- Hard Disk Space 1 GB or greater
- Browser IE 9 (Windows 7), IE 10 (Windows 7 (<u>XP ok until 12/14</u>)
- Java Requirement JRE 1.6.0\_18-49
- User's Computer (Recommended)
- Processor 2 gigahertz (GHz) or faster 32-bit (x86) or 64-bit
- Operating System Windows 7), RAM 2 GB or greater
- Hard Disk Space 2 GB or greater
- Browser IE 9 (Windows 7), IE 10 (Windows 7)
- Java Requirement JRE 1.6.0\_22 -49

#### Installing Avatar – Java & DocView

- Install recommended Java. If you have a higher version of java than the recommended current version, it is recommended you uninstall & downgrade. If you choose to keep new version, it is not a guarantee that Avatar will work properly.
  - Once, Java is in installed, locate DocView16.zip and Extract all files to: C:\Program Files(x86)\Java\jre1.6\lib\ext
     C:\Program Files(x86)\Java\jre1.6\lib\ext

Docview versions	Tank	Marks.					
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My Network Places		and and state	Ednikt AL	14048	Executable Jar File	6/3/2000 4:10 PM	
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			Си. Сору				
			Create Shortout Delete Rename				>
			Properties	_			

#### Installing Avatar – Avatar POS (Scanning)

 (Unzip folder if required) - Double click the AvatarPOS.msi and run the program

🚹 AvatarPOS 32.zip 🛃 AvatarPOS.msi 12/8/2009 10:36 AM Compressed (zipp... 10/24/2008 6:56 PM Windows Installer ..

The installer will install Avatar Document Imaging and Archiving to the following folder.

C:\Program Files\Netsmart\Avatar Document Imaging and Archiving\

To install in this folder, click "Next". To install to a different folder, enter it below or click "Browse".

Install Avatar Document Imaging and Archiving for yourself, or for anyone who uses this computer:

Cancel

Browse... Disk Cost..

Next >

< Back

H Avatar Document Imaging and Archiving

Select Installation Folder

Folder:

Everyone
 Just me

#### (For 64-bit machines be sure to use the 64-bit version)

(select Everyone if you have multiple users on a machine )

#### Installing Avatar – Cache 2010 with Report Viewer 11

#### (Unzip folder if required) - Double click the Reportviewer11.exe and run the program

🚹 Cache2010_RAD2011 for XP_Win7 32 bit.zip	5/7/2013 10:44 AM	Compressed (zipp	62,915 KB
🛃 setup.exe	2/28/2013 4:16 PM	Application	64,122 KB

#### (installing this software shouldn't require a reboot, but if it doesn't wait until after the VPN installation.

Report Viewer - InstallShield Wi	zard
	InstallShield Wizard Completed. The wizard was interrupted before Report Viewer could be completely installed. The system has not been modified. To install this program at a later time, run the installation again. Click Finish to exit the wizard.
	< Back Finish Cancel

### Installing Avatar - Configuring ODBC

 Go to "Control Panel", select Administrative Tool - Data Sources (ODBC)- Select System DSN – Add & Create New Data Source and Navigate to InterSystems ODBC or InterSystems35

ODBC Data Sou	rce Administrator	Creat		
User DSN System	DSN File DSN Drivers Tracing Connection Pooling About			
System Data Sour	ces:			
Name	Driver Add			
AVPMLIVE	InterSystems ODBC Remove			
MSOAVPMLIVE	InterSystems ODBC			
An OE	DBC System data source stores information about how to connect to	s 💿		
on this machine, including NT services.				
	OK Cancel Apply Help			

ate New Data Source	Select a driver for which you want to set up a data sou Name Driver do Microsoft dBase (*.dbf) Driver do Microsoft Excel(*.xls) Driver do Microsoft Paradox (*.db.) Driver para o Microsoft Visual FoxPro	
	InterSystems ODBC InterSystems ODBC35 Microsoft Access dBASE Driver (*.dbf, *.ndx, *.ndx)	Ŧ
	< Back Finish Can	cel

### Installing Avatar - Configuring ODBC

On the Data Source Setup screen create new source for AVPMLIVE with the settings shown in the screens below:

Repeat this process to add a second driver called CWSAVPMLIVE. The ODBC configuration process and the installation process are complete and ready for use.

#### (IP address can be 10.35.174.196 or 197)

Data Source Name WPMLIVE		Description	AT OF
		AVPMLIVE	
Connection			-C. Com
Host (IP Address)	Port	Caché Namespace	
10.35.174.197	1972	AVPMLIVE	OK
Authentication Method	1		
Password	-	Kerberos	Cancel
Password with SSI	./TLS	Connection Security Level	
Jser Name		Kerberos with Packet Integrity	Test Connecti
		Kerberos with Encryption	
Dassword		Service Principal Name	
			Ping
			# Times 1000

,			
Data Source			The second second
Name CWSAVPMLIVE		Description	E O B
		CWSAVPMLIVE	
Connection			
Host (IP Address)	Port	Caché Namespace	
10.35.174.197	1972	CWSAVPMLIVE	OK
Authentication Meth	od		
Password		Kerberos	Cancel
Password with S	GL/TLS	Connection Security Level	
		<ul> <li>Kerberos</li> </ul>	
User Name		Kerberos with Packet Integrity	Test Connection
		Kerberos with Encryption	
Password		Service Principal Name	
			Ping
			# Times 1000
Misc ODBC Log	🔲 Static (	Cursors 📃 Disable Query Timeout	
Lise Locale Dec	mal Sumbol	Inicode SQL Tupes	Help



## Installing Avatar - VPN

Open the Windows VPN client folder Windows XP - VPN Client v.5.0.02
 Unzip folder if required

Double click on the vpnclient\_setpup icon
 igvpnclient\_setup.msi
 10/26/2007 3:29 PM Windows Installer ...

• Follow VPN installation Wizard instructions. After the installation you may be required to restart your computer (on 32 bit machines)

 After restart – open VPN (located in folder you – unzipped VPN client) and import pcf file into VPN

San Mateo County.pcf

1/2/2008 1:16 PM PCF File

8/15/2014 7:51 AM

File folder





## Installing Avatar - VPN

#### • In order to test VPN connection you must have a Authorized user account

Status: Disconnected   VPN Client - Version 5.0.0	02.0090	
Connection Entries Status Certificates Log Options Help		
Connect New Import Modify Delete		alialia cisco
Connection Entries Certificates Log		
Connection Entry	Host	Transport
San Mateo County	gateway.co.sanmateo.ca.us	IPSec/UDP
•		▶
Not connected.		





## **Recap Avatar Installation**

- install java (1.6.22 45
- extract Docview16 Program Files/java/jre6/lib/ext
- install Avatar POS Scan (32 & 64 bit machines)
- install Cache 2010 with Reportviewer 11 (32 & 62 bit machines)
- install Cisco VPN client
  - import .pcf file (32 bit machines only)
- setup ODBC drivers
- Test VPN & Avatar with Account Holder



# Any Questions?



Thank you

Thank you for attending

questions can be sent to <u>aherring@smcgov.org</u> or contact me at 650-573-3538