



## myAvatar Upgrade for Current AVATAR Users

### CURRENT AVATAR USERS:

1. Why the change to myAVATAR?
2. New Terms and Definitions
3. What are the **most important** changes?
4. Sign In/Help
5. Home View & Navigation
6. Chart View & Navigation

### 1. Why the Change to myAVATAR?

We are upgrading to myAvatar to take advantage of enhancements to the “look and feel” as well as to take advantage of some new functions and enhanced features. Generally, **myAvatar’s** access to information is easier.

### 2. New Terms and Definitions:

Let’s go over some of the new terminology associated with myAvatar.

- **Options** are now called **Forms**
- **Tabs** are now called **Sections**
- **Pages** are now called **Sub-sections**
- **My Caseload** is now called **My Clients**
- **My Session** is now called **Recent Clients**
- **My Favorites** are now called **My Forms**
- **Independent Chart Review** is now called **Chart View**
- **Home and Chart Views** are views of information set up for you based on where you work, the functions you perform and the privileges you’re assigned in Avatar. For example, clinical staff have a Clinical Home View and a Clinical Chart View. Administrative Support staff have an Admin Home View and Admin Clinical View. Home Views are a new look for your opening screen and provide cross-caseload information, including clients, forms and reports used most frequently. Chart Views provide access to client specific information such as alerts, listings of progress notes and current prescriptions.
- **Widgets** are windows/views of information that make up your **Home and Chart Views** that display information stored in the Avatar system. Functions such as “Search Clients”, “My Favorites” and “My Caseload” are in widgets also.

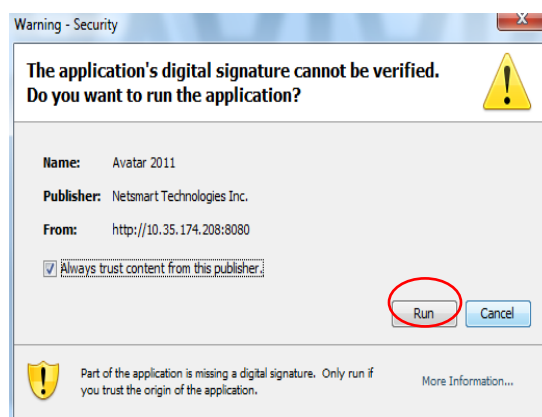
### 3. What are the most important myAVATAR changes?

- When you successfully log on to myAvatar, Avatar opens to the Home View made up of widgets/windows of information about your caseload.

- When you open a client’s chart, Avatar displays a streamlined Chart View made up of widgets/windows of information about the selected client.
- Avatar forms (e.g. Client Relationships, Progress Notes, Assessments) present as scrolling forms rather than as Pages within Tabs.
- Navigation buttons have moved. To **File/Save, Submit** and **Process** an entry or to request a report, there is now a **Control Panel** on the **LEFT side** of a document.
- Functions (ex. Search Clients) and/or information (ex. Client Episodes) are now displayed in boxes or windows called **Widgets**, (*new term*).

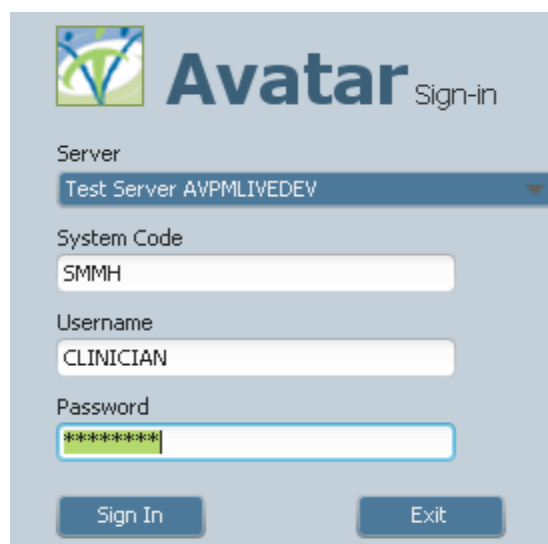
#### 4. Sign In/HELP

When you click on the Avatar icon, a new looking Avatar start screen appears; click **Start Avatar** button in the middle of the window.



The first time you open myAvatar, you may be asked to install or run software. Answer “YES” if a pop up asks if you want to “RUN” the application.

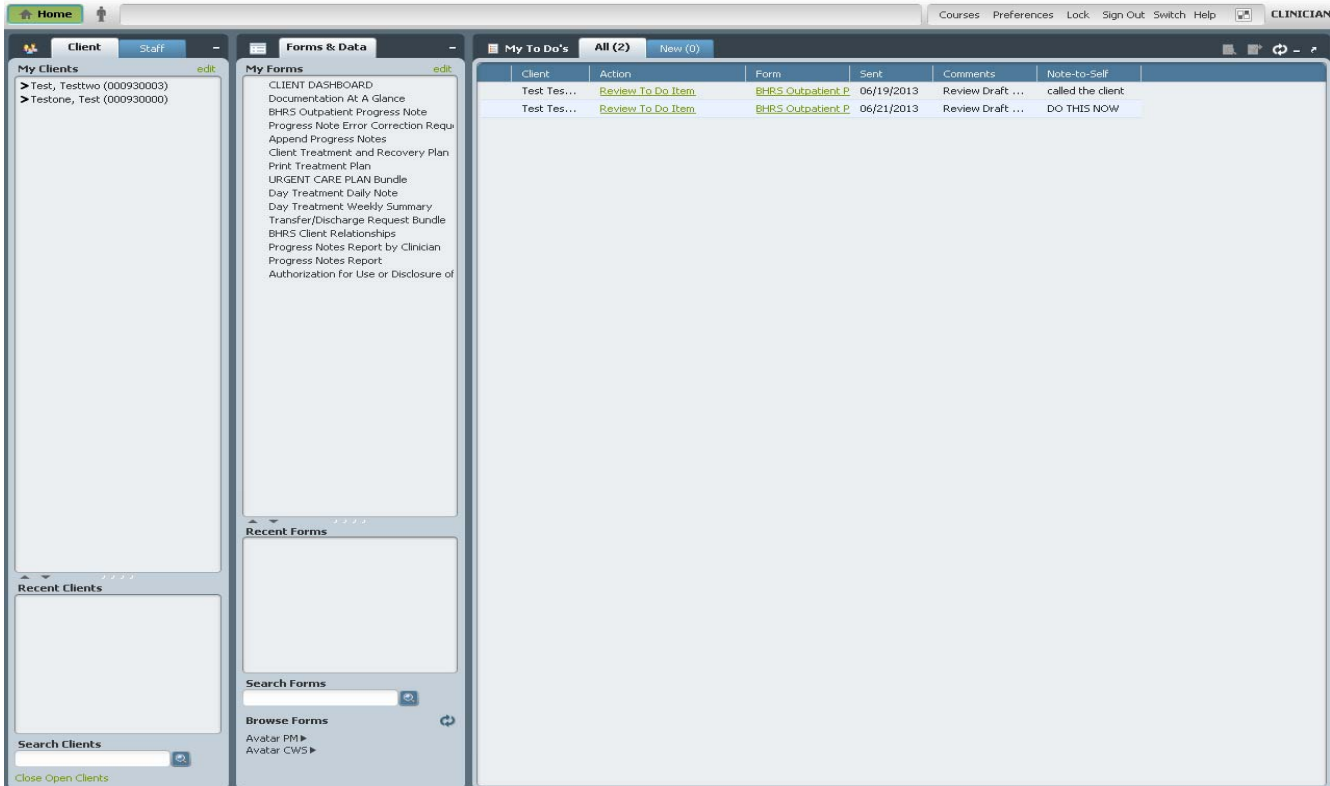
**Your System Code, User Name, and Password are the same as what you used to log in to the older version of Avatar.**



If you need HELP or forgot your password, contact ISD Help Desk at 650-573-3400 or fill out the ISD Self Service Request form found at <http://isdservicerequest.co.sanmateo.ca.us/genrequest.do>

**4. Home View & Navigation:** The Home View YOU see is based on where you work and your role/user privileges (credentials).

**Example of the Home View for the Clinician user role:** My Clients, Forms & Data and My To Do's; See page 5 for specifics about each widget.



**Icons and Navigation Features common to all Home Views:**

The screen shot below is the Menu Bar across the top of the Avatar window. This Menu Bar always displays at the top of the screen regardless of the Avatar forms that are open.



**Home Button:** press to return to your Home View.

- **Courses:** Not used
- **Preferences:**
  - **Spell Checking:** Check these settings to make sure you're using the right Spell Checker and that the "Option" is checked to "Check spelling from start of text."
  - **Themes:** Use this selection to choose one of four color schemes.



Click APPLY for any changes you make; changes will not take effect until you restart the application

- **General:** Allows you to select Visually Impaired- Color Blind view. Instead of Required fields displaying in **Red**, they will appear as **BOLD**. Click Apply for any changes you make; changes will not take effect until you restart the application.
- **Lock:** Locks Avatar to prevent unauthorized access. Unlock the screen by typing in your System Code, User Name and Password. When you unlock the screen, Avatar will be at the exact state where it was before locked.
- **Sign Out: Same as “Logoff”.** *Sign Out* closes the myAvatar application.
- **Switch:** If you currently use this, *switch* functions the same. (Allows a user to move between system codes). **Do not use this feature to Sign Out.**
- **Help:** Help provides *links* to online documentation and search options. The *question mark* provides a hyperlink that connects you with the most current versions of myAvatar reference guides.



**Checkerboard Icon:** Allows you to reload your Home View. If you have minimized a widget (window) and can't figure out where it went or how to get back to your Home View screen, click the checkerboard, click reload home view, then apply and your Home View screen will be back with the minimized section restored.

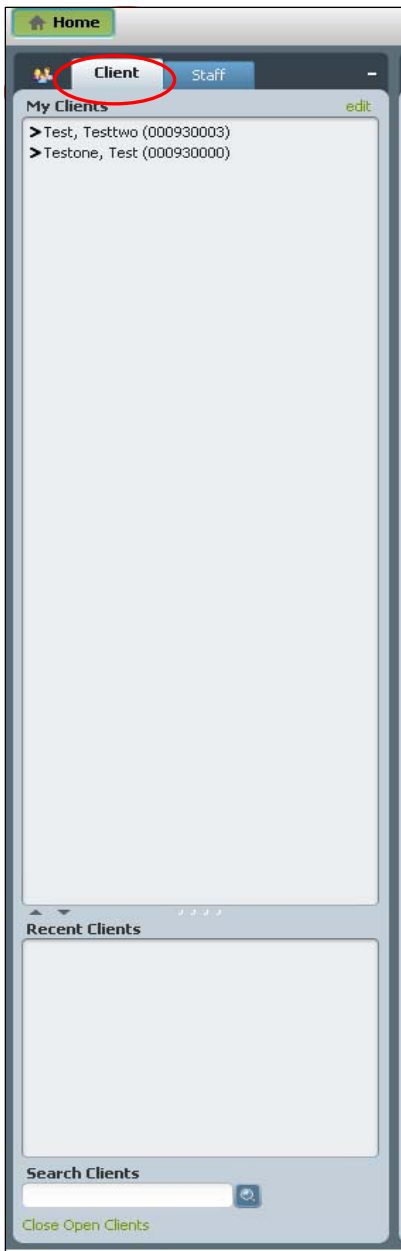
- **Username: *Your*** user name appears all the way to right in the menu bar.

Now let's take a closer look at the widgets of the **Home View**:

As discussed above, the **Menu Bar** contains the **Home Button** that will return you to your **Home View** no matter where you are within the system and displays **Forms** or **Charts** that you have open. You can have multiple forms and charts open at once and they will all be listed in the Menu Bar so you can toggle back and forth between them and the Home view without using the windows task bar.

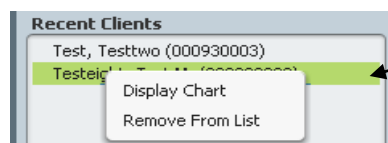
Every Avatar user will have the **My Clients Widget** as well as the **Forms & Data Widget** on his/her Home view (*see screen shot next page*). You will use these widgets to search for and access Clients and Forms that you have rights to in the system.

## Client and Staff Widget



Let's look at the **Client and Staff Widget**.

- All of the clients on your Caseload are listed in **"My Clients"**.
- Any client you have selected during your session will be listed in the section **"Recent Clients"**.
- At the bottom of the Client and Staff Widget is **"Search Clients"**. Use this field to look up clients that are not in My Clients or Recent Clients. This lookup is a **Smart Search** field which means as you start typing in the search information, Avatar will display the list of clients that match what you've typed in. You can search by name, alias, social security number, Avatar ID or date of birth. When you select the client, his/her name will populate in the Recent Clients section.
- You can open the chart of any client listed in **My Clients** or **Recent Clients** by either double clicking on the name or by right clicking on the name and selecting **Open Client Chart** from the menu that displays.
- **OPEN** a form/report by clicking once on a client to select him/her, then clicking once on the form/report in the **Forms & Data Widget**.



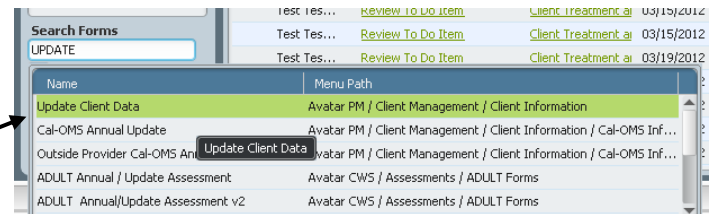
You can Right click on the client name for Chart or to Remove

## Forms & Data Widget

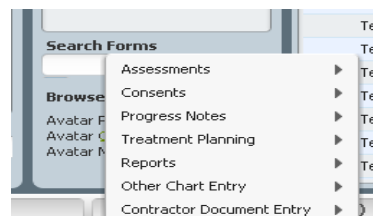


- The top section of this widget is titled **My Forms**, which contains what was your “Favorites” from the previous system. All of your favorites will carry over and display in this section of the widget after the upgrade. In order to edit (organize) your **My Forms**, click **Edit** at the top right of the widget.
- Also, any form that you access within your session (before you log out) will remain in the **Recent Forms** section.
- Next let’s look at the **Search Forms** field. This 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.

Many Options, Click on form you want



- If you search for a client-specific form and do not have a client selected, the **Select Client** screen will display. Select the client from your list or use the **Smart Search** field. In this field you can search for: Last Name (or just a portion of it), or Last Name,First Name (or just a portion of the first name), Patient ID #, Date of Birth, Claim Number, etc. Once you select the client, Select the form and it will open. (notice the client and form name in the menu bar).
- If you wish, you can also use the **Browse Forms** drop down menu.



## My To Do's Widget

Client	Action	Form	Sent	Comments	Note-to-Self
Test Tes...	<a href="#">Review To Do Item</a>	<a href="#">BHRS Outpatient P</a>	02/09/2012	Review Draft ...	
Test Tes...	<a href="#">Review To Do Item</a>	<a href="#">Client Treatment a</a>	03/01/2012	Client Treatm...	
Test Tes...	<a href="#">Review To Do Item</a>	<a href="#">Client Treatment a</a>	03/15/2012	Draft Client Tr...	
Test Tes...	<a href="#">Review To Do Item</a>	<a href="#">Client Treatment a</a>	03/15/2012	Draft Client Tr...	
Test Tes...	<a href="#">Review To Do Item</a>	<a href="#">Client Treatment a</a>	03/19/2012	Client Treatm...	
Test Tes...	<a href="#">Review To Do Item</a>	<a href="#">Client Treatment a</a>	03/20/2012	Client Treatm...	
Test Tes...	<a href="#">Review To Do Item</a>	<a href="#">Client Treatment a</a>	03/20/2012	Client Treatm...	
Test Tes...	<a href="#">Review To Do Item</a>	<a href="#">Client Treatment a</a>	03/20/2012	Client Treatm...	
Test Tes...	<a href="#">Review To Do Item</a>	<a href="#">Client Treatment a</a>	04/27/2012	Client Treatm...	
Test Tes...	<a href="#">Review To Do Item</a>	<a href="#">Client Treatment a</a>	03/20/2013	Client Treatm...	<input type="text" value="add wellness goal"/>

**Click any document in the Form column and it will bring you right to the form and open it.**

**You can type a brief notation in the note-to-self column regarding a document**

### More About Widgets...

Depending on your user role, and as BHRS identifies the need, other widgets will show up on your Home View. Many Avatar users will have a “My To Do List” widget. Other widget examples are “Current Medications”, “Document Compliance”, and “Client Demographics”. All widgets whether they appear on the Home View or Chart View have some controls and features in common.

The icons below are available for most widgets. They are found on the top right hand portion of any widget.



**Refresh:** Allows any new information to become available in your menu or on your screen if it was added during the session. Refresh brings any recently filed data into display.





**Minimize:** Allows a widget or screen to be minimized temporarily from view. Click on the minus sign at the top right of the widget/screen and it will move to a bar at the bottom of the form/screen. To restore the widget, find the widget label at the bottom of the form/screen, click on the restore icon. Please see checkerboard info if you get lost



**Undock:** Allows you to work on/view a document or form in a separate window for the purpose of it being easier, less crowded and/or distracting to view or work on when the screen is full. Just click on the *undock* symbol and the separate window with the document appears.



**Re-Dock:** Just click on this symbol and the form will return to the position it was in before it was undocked.

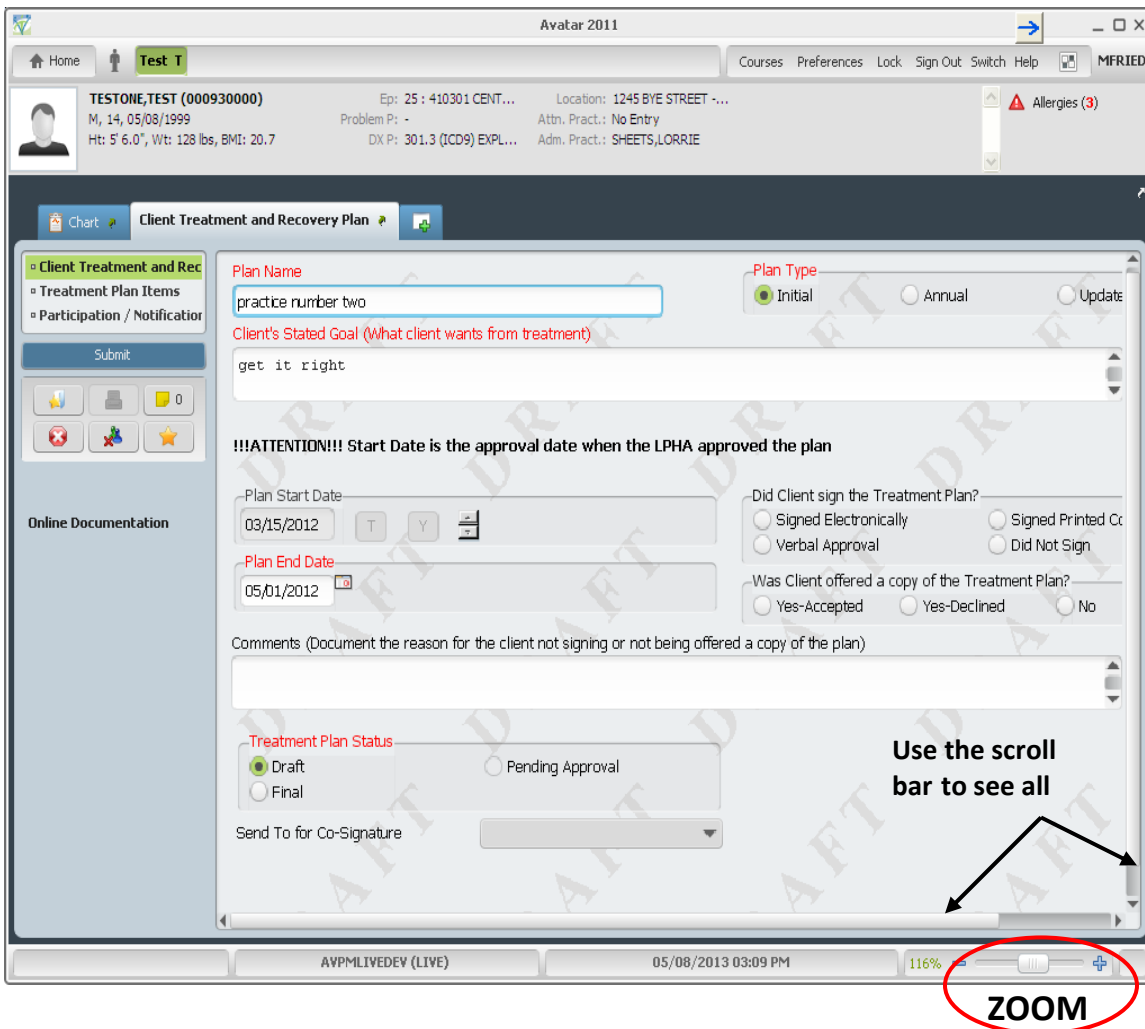
**Re-Sizing Widgets:** To display more information in one widget, and reduce the size of another, you can expand both the vertical and/or horizontal view by hovering over the edge of a widget. When you see the double headed arrow appear   right click and hold. Then drag the mouse...

To increase a box horizontally, click and hold a left or right edge and drag the mouse left or right. To increase vertically, click and hold a top or bottom edge then drag the mouse to make smaller or bigger.

The **SCROLL Bar (s)** will help you to see all the information within a widget

**To open a form for a client:**

Once the client is highlighted, click on the form from the My Forms section. Below is the Client Treatment and Recovery Plan (you could also select a form and then select the client.)



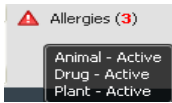
**Home** returns you to the **Home View**.

**Test T** Active Client Name is highlighted.

TESTONE,TEST (000930000)  
M, 13, 05/08/1999  
Ht: 5' 6.0", Wt: 128 lbs, BMI: 20.7

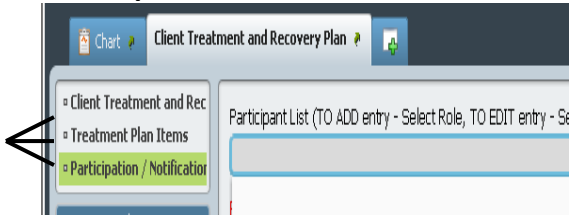
**Client Demographics** now includes Height, Weight and BMI, the Episode number and Program Name and Location, Diagnosis and Practitioner.





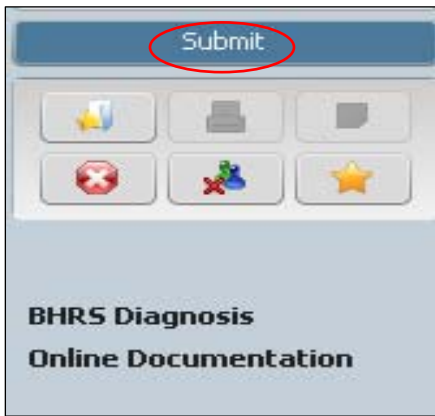
**Allergies** are displayed if you hover or click on Allergies. (OrderConnect allergies are not available here)

**Sections Replace Tabs:**



Instead of “Tabs” across the top that define the data requirements of the document; there is a list of **“Sections” displayed on the upper left side of the form**. Click on the Section you want to go to. You can also scroll through the form and/or use the Tab & Arrow keys to navigate through the form. **F5 will clear/delete a field.**

There is a **“control panel”** to submit the form

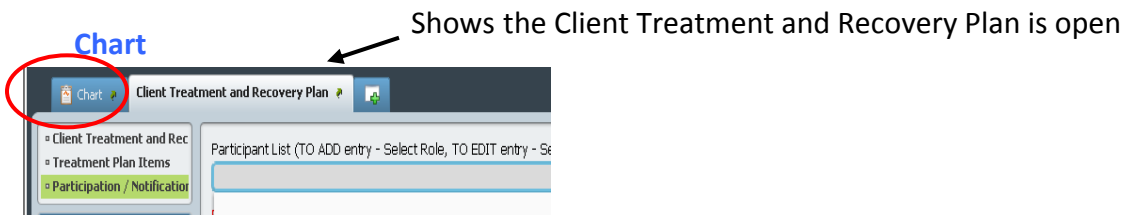


**Submit** Press to save/submit data.

- **Add Form to My Forms** – Select to add this form to My Forms.
- **Close Form** – Select this to **close a form without saving changes**.
- **Print Form** – Allows you to print the form 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.
- **Add Client to My Clients** – You may add this client to My Clients, for this session. If the client is not on your caseload, s/he will be removed from My Clients at Sign Out.



**Zoom:** Located at the bottom right of an open form. To **zoom**, click and hold, then move the zoom slider. Or, Click the plus or minus buttons. A zoom level screen will display; you can select a zoom percentage, click OK. **Note: The zoom settings are saved after logging out.**





To Open another form for the client, Click on the **PLUS**; select the form you want to open. You can open more forms the same way.

Notice to the left of the treatment plan document is **Chart**. This is another way you can access the Client’s Chart. (Also double click on client’s name and/or within the My Client’s widget, Right click on client’s name)



**Links to the BHR5 Diagnosis, On Line Documentation** and/or other links may be listed on a form on the left hand side, under the control panel. When you click on the Diagnosis Link you can add/update the diagnosis while you are working in a form. The Online Documentation Link takes you to online **HELP**.

Progress Notes/Assessments in “DRAFT” status will automatically display with DRAFT water marks in the background.

## 6. Chart View & Navigation

Chart View provides a more detailed look at information specific to a client. Double click on a client name in My Clients, Recent Clients or Search Clients box from your Home View and you can move immediately to the client’s chart. User privileges determine what information can be accessed from Chart View.

To get back to Home View from Chart View click on the Home button on the upper left Menu Bar.

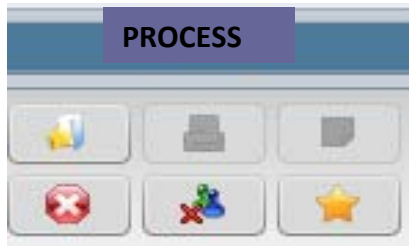
**Chart View** (*was Chart Review*) displays all the finalized forms, documents and reports that exist for a client. The Client’s Chart Overview may contain widgets such as: Client Demographics, BHR5 Client Relationships, Medications Client Episode History, and Progress Notes.

**Example of Chart View for the Clinician user role:** List of all reports and finalized forms by category are on the left hand side; Use the scroll bar to see all.

The screenshot shows the My Avatar 2011 interface for a clinician. The top navigation bar includes 'Home', 'test T', 'Courses', 'Preferences', 'Lock', 'Sign Out', 'Switch', 'Help', and 'CLINICIAN'. The main content area is titled 'Chart' and 'Overview'. On the left, there is a 'Client Information/Consent' sidebar with a scrollable list of documents and assessments. The main area contains several widgets: 'Client Demographics' (Name: TEST, TESTONE, ID: 930000), 'Medications' (table below), 'Client Episode History' (empty), and 'Progress Notes' (Previous 30 days, Selection: All Notes, (1) BHR5 Standard Note - 06/26/2013 by MyAvatar Clinician Demo ID). A message at the bottom of the Client Episode History widget states: 'Widget exceeded the time limit allowed to return results. Please notify your system administrator.'

Med Name	Start Date	Dosage	Prescriber	Refills	Pharmacy	Instructions
multivitamin with minerals	2013-04-01	- Multiple Vitamins with Minerals, CAP, PO (1)ea QD	Cabal, Robert	0	TEST - ISD Only	
Cogentin	2013-03-26	- 2 mg, TAB, PO (1)ea QHS	Cabal, Robert	0	Walgreens Drug Store 00063	
Tegretol	2013-03-26	- 200 mg, TAB, PO (1)ea BID	Cabal, Robert	0	Walgreens Drug Store 00063	

Once you select a report from the list you must click **Process** on the Control Panel.



**⚠ Documents for Release get printed from the Chart View.**

### Icons and Navigation Features common to *all* Chart Views:

**Overview** **Chart View Overview:** Displays your main Chart View and all the widgets assigned to you. Once you have viewed a document, form or report, click **Overview** to return to your main Chart View.



**Click to Refresh your screen if you've added information.**



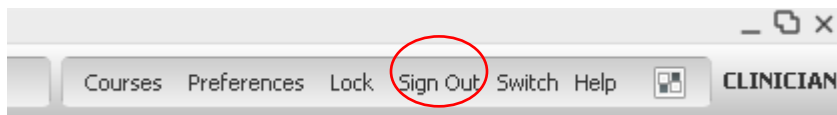
**Click to close the chart.**



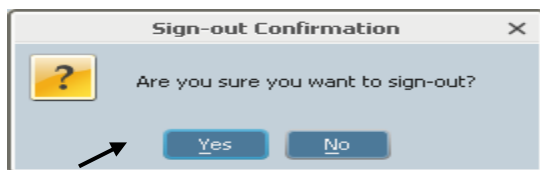
**Click Plus to open a form, document and/or report while in Chart View.**

Chart View also includes the UNDOCK/DOCK and CHECKERBOARD Icons and the SCROLL Bar features already described.

### LOGGING OFF



Click Sign Out on the Menu Bar.



Say "Yes" to the Sign-Out Confirmation pop up and then



click EXIT