



Accessing & Installing Avatar

Thursday, October 9, 2014 - 10:30 - 12:00 pm



Presenter

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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

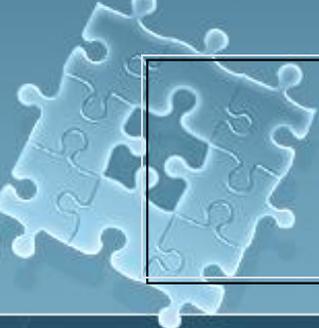
Types of Users

- 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>

- BHRM MH Credentialing Form
- BHRM 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



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

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



- **Remote Access Request**

- must be mailed (Original signatures needed)

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Training Requirements

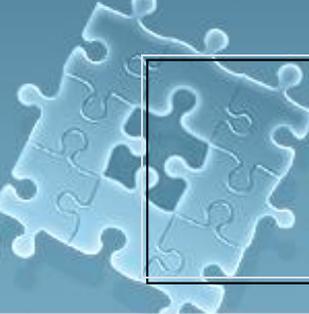


All users are required to complete two (2)- online trainings

<http://www.smchealth.org/bhrs/providers/ontrain>

1. Introduction to the BHRIS Avatar Electronic Medical Record
2. BHRIS 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)



Recap

Identify Users

**Complete
Paperwork**

Email & send
via snail mail

**Receive
Avatar & VPN
Accounts**

**Complete
On-line
training**

Practice using
Avatar in class

**Attend
Hands-on
Training**

HIPAA & Intro
To Avatar



Q & A

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 aherring@smcgov.org 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
3. 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



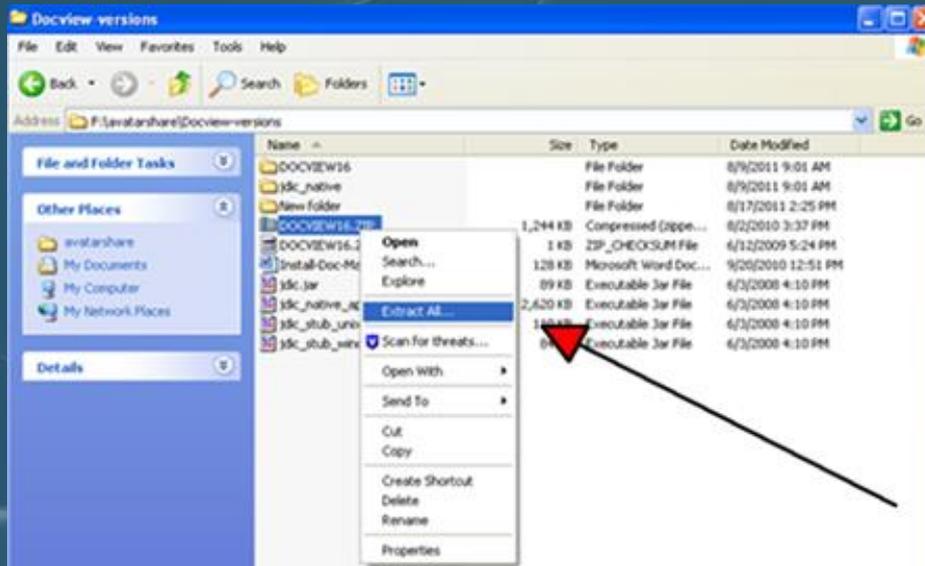
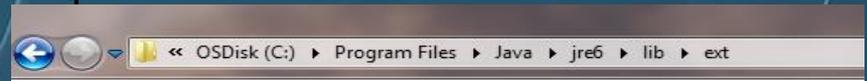
Hardware Current Recommendations

- 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) **(XP ok until 12/14)**
- 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 installed, locate DocView16.zip and Extract all files to:
C:\Program Files(x86)\Java\jre1.6\lib\ext



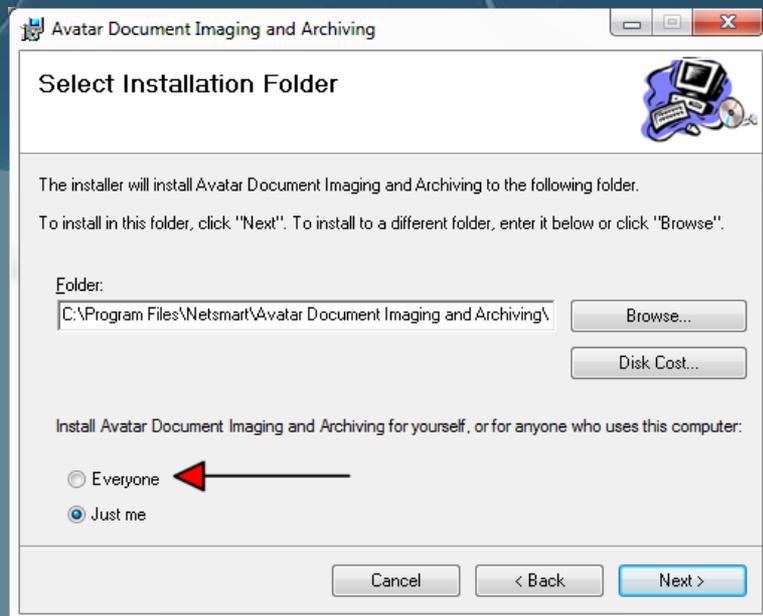
Installing Avatar – Avatar POS (Scanning)

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

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

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

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

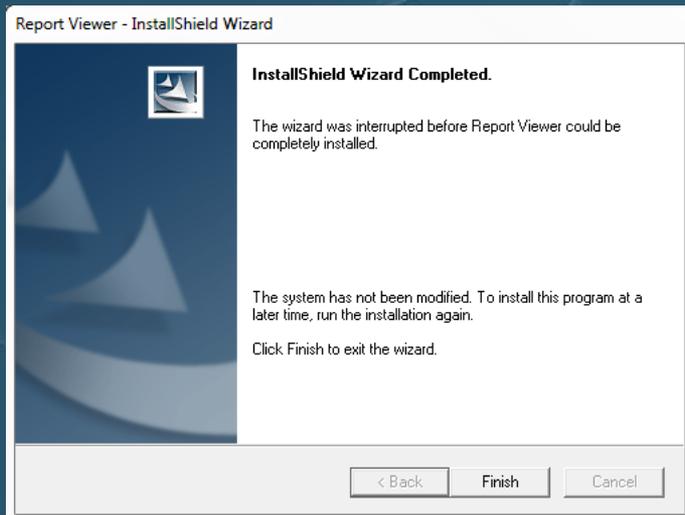


Installing Avatar – Cache 2010 with Report Viewer 11

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

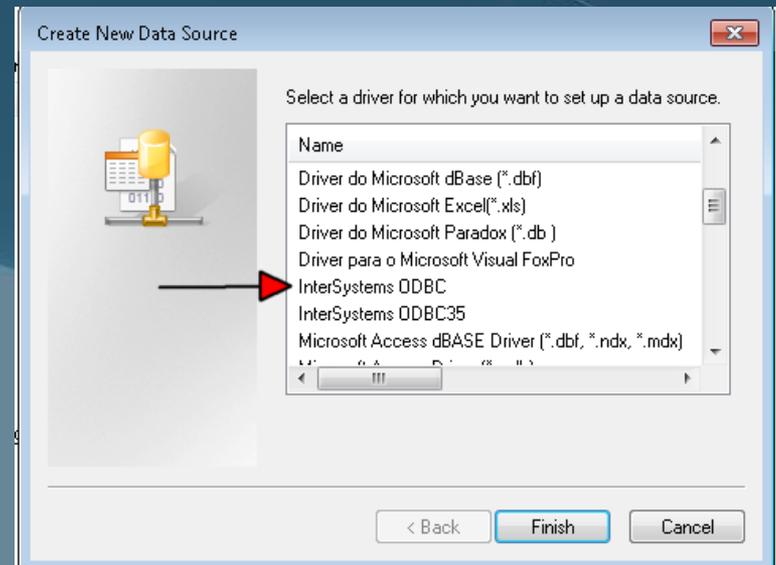
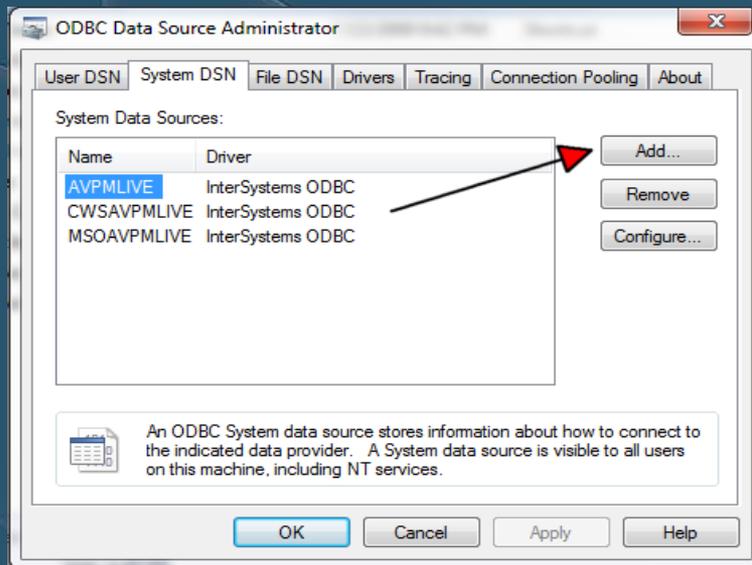
 Cache2010_RAD2011 for XP_Win7 32 bit.zip	5/7/2013 10:44 AM	Compressed (zipp...	62,915 KB
 setup.exe	2/28/2013 4:16 PM	Application	64,122 KB

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



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





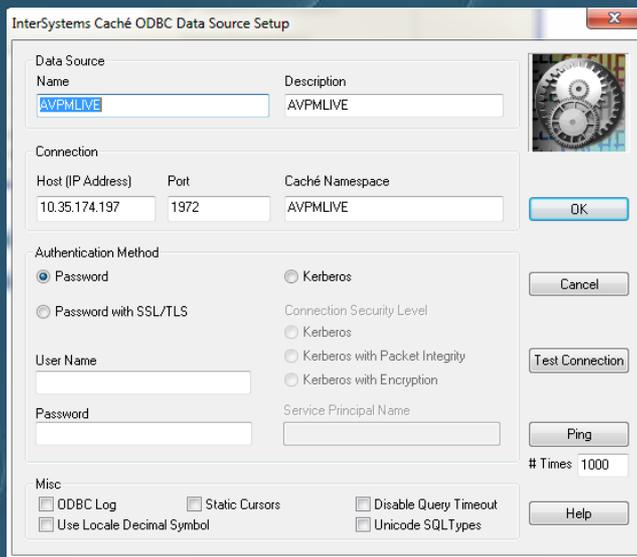
Installing Avatar - Configuring ODBC

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)



InterSystems Caché ODBC Data Source Setup

Data Source Name: AVPMLIVE Description: AVPMLIVE

Connection Host (IP Address): 10.35.174.197 Port: 1972 Caché Namespace: AVPMLIVE

Authentication Method: Password Kerberos

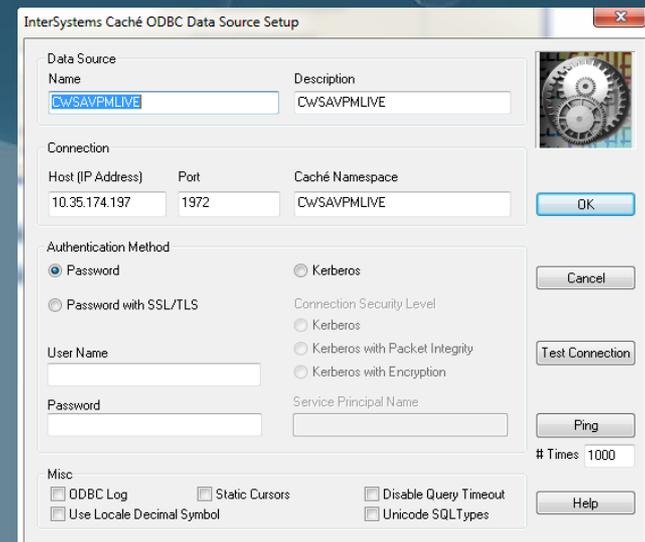
Connection Security Level: Kerberos Kerberos with Packet Integrity Kerberos with Encryption

User Name: Password: Service Principal Name:

Misc: ODBC Log Static Cursors Disable Query Timeout Use Locale Decimal Symbol Unicode SQLTypes

Times: 1000

Buttons: OK, Cancel, Test Connection, Ping, Help



InterSystems Caché ODBC Data Source Setup

Data Source Name: CWSAVPMLIVE Description: CWSAVPMLIVE

Connection Host (IP Address): 10.35.174.197 Port: 1972 Caché Namespace: CWSAVPMLIVE

Authentication Method: Password Kerberos

Connection Security Level: Kerberos Kerberos with Packet Integrity Kerberos with Encryption

User Name: Password: Service Principal Name:

Misc: ODBC Log Static Cursors Disable Query Timeout Use Locale Decimal Symbol Unicode SQLTypes

Times: 1000

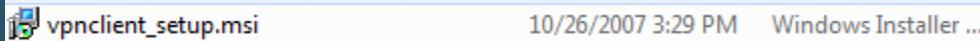
Buttons: OK, Cancel, Test Connection, Ping, Help

Installing Avatar - VPN

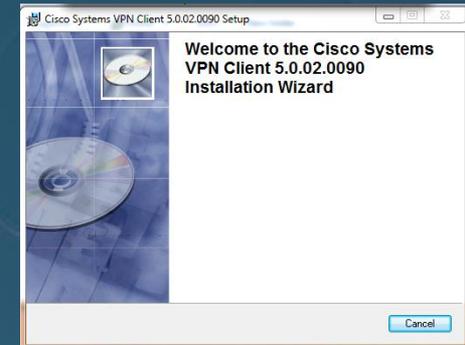
- Open the Windows VPN client folder
Unzip folder if required



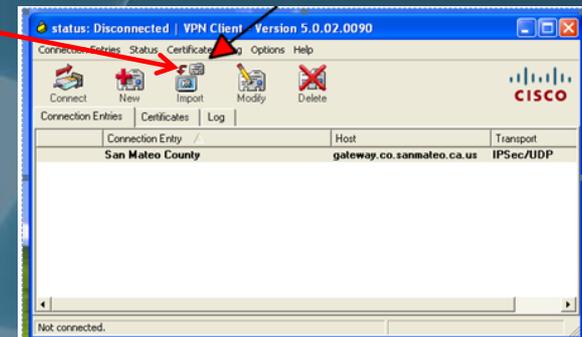
- Double click on the vpnclient_setup icon



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

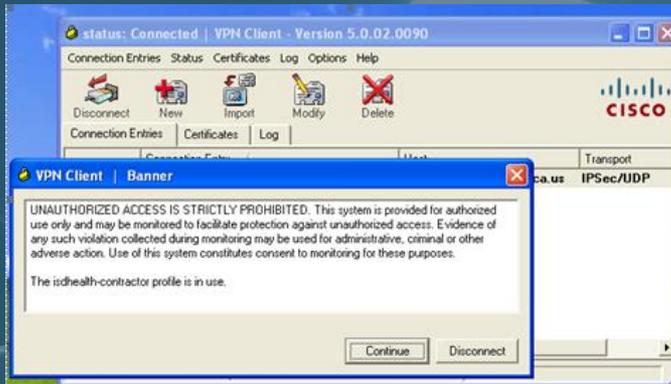
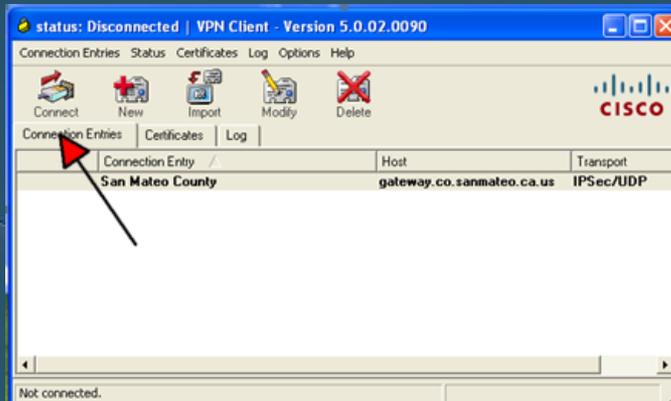


- After restart – open VPN (located in folder you unzipped VPN client) and import pcf file into VPN



Installing Avatar - VPN

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





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



Q & A

Any Questions?



Thank you

Thank you for attending

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