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LESSON SCENARIO

Maria Montoya is an administrator at a BHRS clinic. She scans a client’s consent to treatment into Avatar in order to maintain a complete electronic record for the client and to ensure that the client’s signature is on file.
In this lesson you will learn to scan documents into Avatar. The need to scan documents relates to documents that are available in paper form only, such as a client’s driver’s license, pay stub, proof of insurance, and so forth. It also includes paper based documents where a signature is needed, such as consents and Payor UMDAP reports.

You will also learn to view and print scanned documents.

Lesson Objectives

- Perform the steps needed to set up a document for scanning
- Use the document scanner to scan documents into Avatar
- Use the Clinical Document Viewer to view and/or print documents
UNDERSTANDING SCANNING DOCUMENTS
Avatar provides Point of Service (POS) scanning, which is scanning on demand. POS indicates that you can easily scan documents into Avatar just at the time you need to.

Scanning client-related documents into Avatar assures that key clinical information can be electronically shared throughout the organization. It eliminates the cost of managing and storing paper-based records, and it improves client quality of care by providing access to one comprehensive source of client information, the electronic health record.

WHAT DOCUMENTS WILL I SCAN?
The following list provides examples of documents that you would typically scan into Avatar.

- Assignment of Benefits
- Insurance Cards
- Driver’s Licenses
- Signed Payor UMDAP Reports
- Consent Forms
- Signed Client Treatment Plans

WHO CAN PERFORM THIS FUNCTION?
Administrators scan documents into Avatar.

MENU PATH
Avatar CWS ➔ Document Management ➔ POS Scan or
Avatar CWS ➔ Document Management ➔ POS Scan64 for 64 bit machines
**DOCUMENT IMAGING AND ARCHIVING – POS WINDOW**

Use this window to describe the document you are scanning.

<table>
<thead>
<tr>
<th>FIELD/BUTTON</th>
<th>DESCRIPTION</th>
</tr>
</thead>
<tbody>
<tr>
<td>A) Type</td>
<td>Select Client from the dropdown list to view documents related to a specific client or select Staff to view documents scanned for a particular staff member.</td>
</tr>
<tr>
<td>B) Client</td>
<td>Type the last name of the client whose record you are attaching the scanned document to and tap [Enter] to retrieve the full client name. If there is more than one client with the same last name, use the dropdown list to select the correct client.</td>
</tr>
</tbody>
</table>
| C) Episode   | **IMPORTANT**
For Progress Notes and Treatment Plans, be sure that you select the correct episode to scan these documents into.
For all other scanned documents select Non-Episodic. |
<p>| D) Origination Date | The Origination Date is the date of the document. If a document requires signatures of both the clinician and the client and the client signs at a later date than the clinician, the date of the clinician’s signature is the document date. |</p>
<table>
<thead>
<tr>
<th>FIELD/BUTTON</th>
<th>DESCRIPTION</th>
</tr>
</thead>
<tbody>
<tr>
<td>E) Form</td>
<td><strong>IMPORTANT</strong>  &lt;br&gt;Select the category that matches the type of document you are scanning. Choosing the correct form category is essential to allow others to retrieve the document in the future.</td>
</tr>
<tr>
<td>F) Scan</td>
<td>Click the Scan button to begin the scanning process</td>
</tr>
</tbody>
</table>

**SCANNING DOCUMENTS**

Clicking the Scan button in the Document Imaging and Archiving – POS window displays the dialog box shown in the following illustration. Clicking the Scan button in this dialog box begins the scan.

**NOTE:** The document should be face down in the scanner.
When the scan is complete, you see the scanned document displayed in the Document Imaging and Archiving – POS window. Verify that the quality of the scanned document is readable, and the signature is legibly.

<table>
<thead>
<tr>
<th>BUTTON</th>
<th>DESCRIPTION</th>
</tr>
</thead>
<tbody>
<tr>
<td>A) Add Page to Current Document</td>
<td>Use this feature if a page is missing from a document, if a page is damaged during the scanning process, or if the scanned image of a page is poor quality.</td>
</tr>
<tr>
<td>B) Save File to Avatar</td>
<td>Use this button to save the scanned document into Avatar.</td>
</tr>
<tr>
<td>C) Close Document</td>
<td>If the scanned document quality is poor, click the Close Document button and re-scan the document.</td>
</tr>
</tbody>
</table>
CLINICAL DOCUMENT VIEWER

Administrators use the Clinical Document Viewer to view documents scanned into Avatar, such as consents, scanned insurance documents, and so forth.

WHO CAN PERFORM THIS FUNCTION?

Administrators and clinicians have the ability to view, print and void scanned documents. The documents you can view depend on your level of permissions in Avatar. For example, documents indicating HIV status are restricted to specific staff members.

MENU PATH

Avatar CWS ➔ Document Management ➔ Clinical Document Viewer

THE CLINICAL DOCUMENT VIEWER WINDOW

Use this window to view documents that were scanned into Avatar.
<table>
<thead>
<tr>
<th>FIELD/BUTTON</th>
<th>DESCRIPTION</th>
</tr>
</thead>
<tbody>
<tr>
<td>A) Select Type</td>
<td>Select Client to search for documents related to a specific client or choose Staff to locate documents that were scanned for a particular staff member.</td>
</tr>
<tr>
<td>B) Select All or Individual Client</td>
<td>Normally you will select Individual.</td>
</tr>
<tr>
<td>C) Select Client</td>
<td>Type all or part of a client’s name and tap [Enter]. If more than one name appears, select the desired name from the list.</td>
</tr>
<tr>
<td>D) User</td>
<td>Choose yourself as the user.</td>
</tr>
<tr>
<td>E) Document Status</td>
<td>BHRS does not use this field.</td>
</tr>
<tr>
<td>F) Document Origination Date (Start/End)</td>
<td>Enter dates here to select a date range for documents you want to view.</td>
</tr>
<tr>
<td>G) Form Selection</td>
<td>If you wish to narrow your search, choose By Categories/Forms and click the Select button to display a list of document categories including, Restricted, Correspondence, Consent, Financial, Emergencies, and Assessments, as shown in the figure following this table. &lt;br&gt;&lt;br&gt; <strong>NOTE:</strong> If you need to print a restricted document, contact Quality Management.</td>
</tr>
<tr>
<td>H) Episode</td>
<td>To search for documents related to a particular episode, choose the episode from this list.</td>
</tr>
<tr>
<td>I) Document Source</td>
<td>POS Scan/Import is the only category BHRS uses.</td>
</tr>
<tr>
<td>J) Form Restrictions</td>
<td>Choose either Include or Exclude to narrow your search. Archived Documents is not used by BHRS at this time.</td>
</tr>
</tbody>
</table>
FORMS SELECTION BY CATEGORIES

Choosing By Categories/Forms in the Form Selection area and clicking the Select button displays the following window, which lists document categories. Clicking the Expand/Collapse button to the left of the category name expands or collapses the category listing. Clicking a checkbox defines which documents the viewer will retrieve.
**Clinical Document Viewer Search Results Window**

This window displays a list of all documents that qualify based on the criteria chosen in the Clinical Document Viewer window.

<table>
<thead>
<tr>
<th>ITEM</th>
<th>DESCRIPTION</th>
</tr>
</thead>
<tbody>
<tr>
<td>A) Search Tab</td>
<td>Click this tab to conduct another search or to return to the Search window where you can close the window.</td>
</tr>
</tbody>
</table>
| B) Lock Icon | If a lock icon appears in this column, it means that the document is restricted, based on your Avatar permissions and you cannot print or view the document.  
**NOTE:** If you need to print a locked document, contact Quality Management. |
### Item | Description
--- | ---
**C) Buttons** | • View—View the selected document.  
• Print—Print the selected document. If the Print button is grayed out when you select a document, it means the document is restricted and you do not have rights to print it. If you must print the document, contact the ISD Help Desk at 573-3400 or Quality Management.  
• Void—Void the selected document. (Not everyone has rights to void scanned documents. Administrators have the rights to void documents.)  
• Close All Documents—Close all documents you opened during this session.

### Viewing and Printing a Scanned Document

The following figure displays a document view. You can print the document, if needed, from this window.
CONCEPT REVIEW

See appendix for answers.

1. When scanning a document that is not related to a specific episode, what do you choose in the Episode dropdown list?
   a. Episode #1
   b. Non-Episodic
   c. The most recent episode

2. When scanning a document, what do you enter as the Origination Date?
   a. The date of the document
   b. The current date
   c. The client’s admission date

3. Should you place a document you want to scan face up or face down in the scanner?
   a. Face up
   b. Face down

4. If you are using the Clinical Document Viewer, what do you do if you need to print a restricted document?
   a. Find someone in your office who has access to the document and have them print it.
   b. Forget about it.
   c. Contact Quality Management.
APPENDIX—CONCEPT REVIEW ANSWERS

1. b
2. a
3. b
4. c