SF HEALTH NETWORK
SAN FRANCISCO DEPARTMENT OF PUBLIC HEALTH

Hidden Gems for
Avatar Champions
May 15, 2017

As a token of our appreciation for your participation as an Avatar Champion, we are pleased to share with you hidden gems, helpful tricks and shortcuts in the hopes that it will enhance your Avatar experience.

Please share widely with your colleagues so that they can benefit from these shortcuts.

- Consider making copies and discussing during an upcoming staff meeting.
- Keep a copy by your desk.
- Place copies in the break room or hang around the office.

We continually strive to improve our materials so if you have a tip or trick not included in this document or you have a further questions please send an email to:
AvatarChampions@sfdph.org

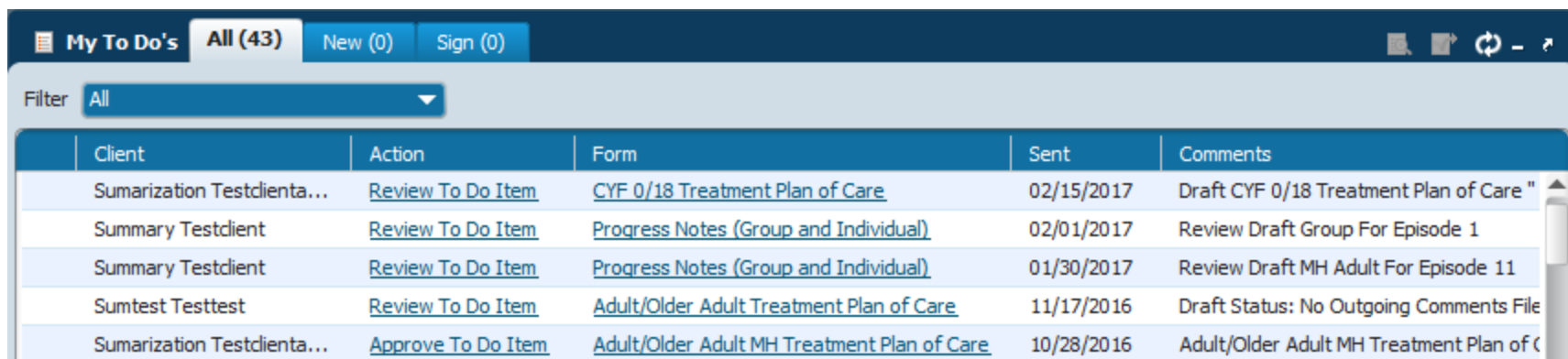If you need further assistance, please contact the Avatar Help Desk at (415) 255-3788 or via email at:
AvatarHelp@sfdph.org

Table of Contents

Consoles: Provide a quick way to display data at the click of a button (there is a separate hand out available with details)

To Do Widget: Return to draft forms by clicking on the name of the form. Approve items by clicking on "Approve To Do item"
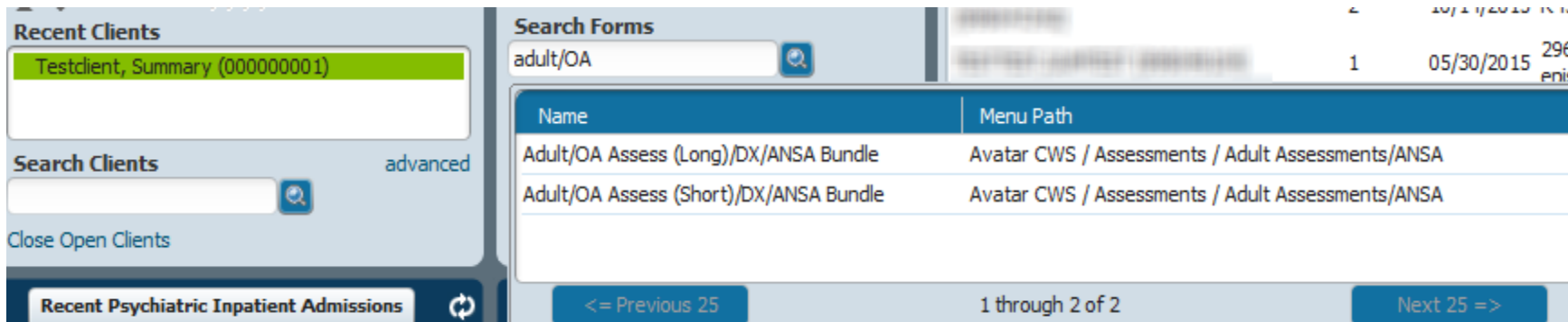
Hyperlinks: In Avatar, items that are blue and underlined are hyperlinks that will take you directly to the selected client's data entry form.

Refresh: Each widget contains a refresh button. You can refresh any widget by clicking the refresh button. The date will update with the latest information.

Pre-selecting your client: You can pre-select your client before opening a form by highlighting the client and then selecting the form you wish to open. You will not have to enter the client's name or BIS number.
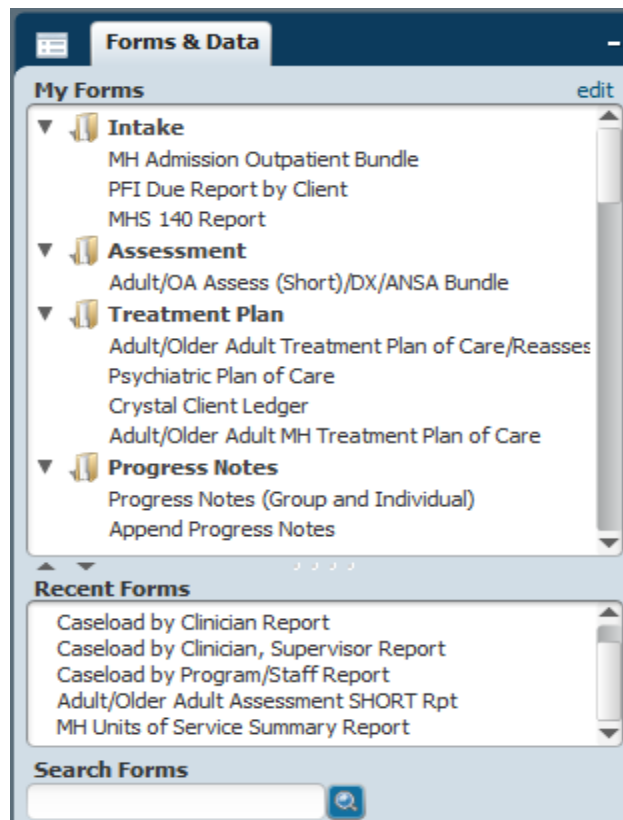
My Forms is like favorites in Avatar. You can quickly add your frequently used forms and reports by simply dragging the name of the form from the Recent Forms into "My Forms"
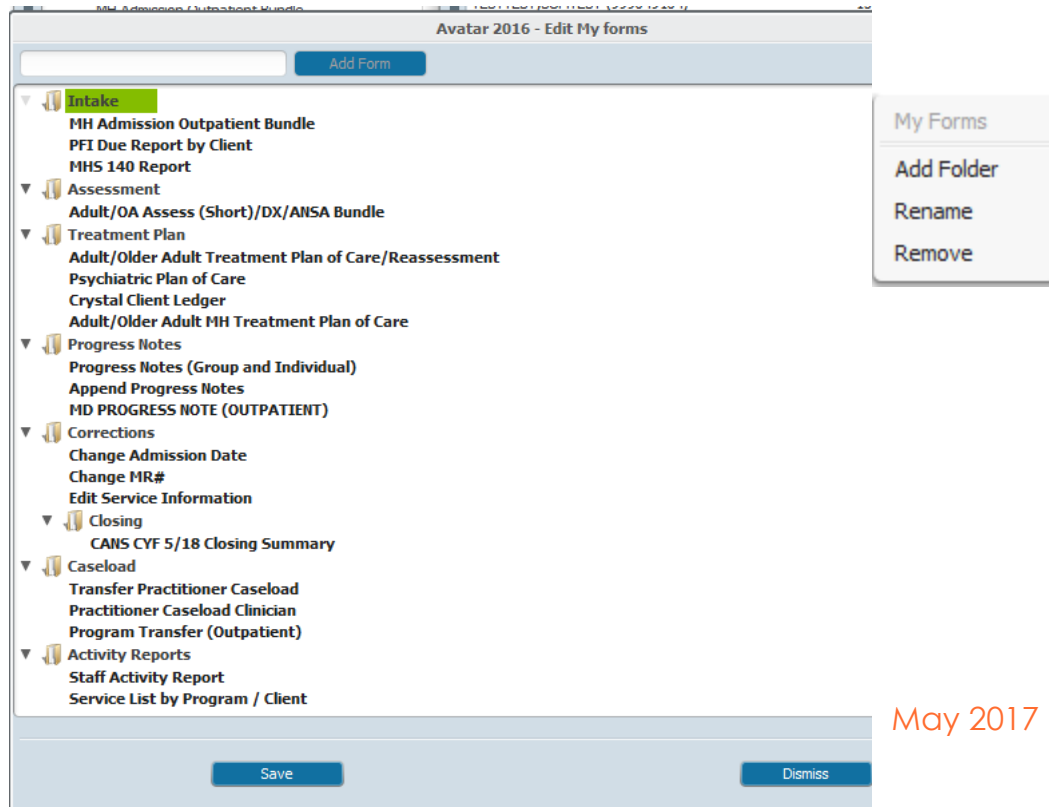
My Forms (continued):
You can also add folders by clicking on the word "edit"
This will open a new window
Right click in the window to add a new folder
Be sure to click "Save" in order to save your changes

Get to the chart view by double clicking on a client's name from My Clients or from Recent Clients.

Quick Links: From the Chart View, you can easily view the contents of any form by clicking the name of the form in the Quick Links. Scroll across to select the episode.

Quick Links (continued):

You can add forms to the Quick Links by clicking on the icon that looks like two white windows.
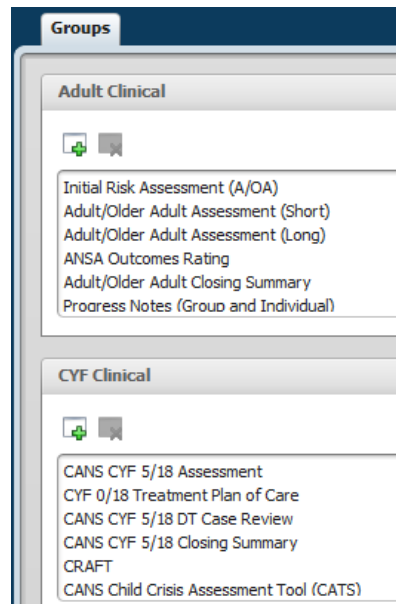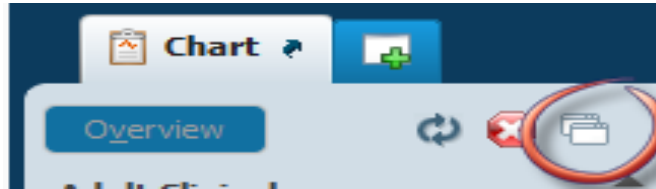
This will open a new window where you can permanently add a form to the Quick Links. Decide which group you want to add the form to and click the "add" button to search for the form you want to add.

Edit from Chart View: If your document is in draft, you can edit from Chart View.

Printing from Chart View: Print from Chart View by clicking the word "Report." This will give you the official report with City Seal. Selecting the word "Print" will only print out the contents of the form as it is displayed in the widget without the City Seal and Client Header.

You can get to the Menu path to print your report by typing the name of the form and selecting the version that ends with the word "report" or "RPT"

ELinks page/return to Chart view | Current Medications, Lab Results, Recent 10 Vitals

Elinks Toggle Button: Links you to other websites including those below. Click the button again to return to the Chart Overview.

CCMS Summary Page
Click here to see the patient's Coordinated Care Management System Summary.

Enterprise Med List
We are unable to match your Avatar client to a DPH medical record number.

Patient Membership
We are unable to match your Avatar client to a record in Patient Membership.

CBHS Training Site
The Community Programs Training Unit offers several training programs that may help you with work and life.

Invision/LCR
Invision/LCR

DPH Provider Lookup
List of the DPH Providers

Web Directory
DPH Staff

Community Behavioral Health Services
Main page for Community Behavioral Health Services

SF HEALTH NETWORK
SAN FRANCISCO DEPARTMENT OF PUBLIC HEALTH

ELinks page/return to Chart view | Current Medications, Lab Results, Recent 10 Vitals

Current Medications, Lab Results, Recent 10 Vitals Toggle Button: Displays the Client's medications as recorded in Order Connect, Lab Results (this is still being piloted), and the 10 most recent Vital Signs. Click the button again to return to the Chart Overview.

Current Medications

Drug Name	Dosage	Start Date	End Date
Adderall	- 10 MG, Tablet, Oral (1)Tablet Twice a Day	03/20/2017	04/18/2017
RisperDAL	- 0.5 MG, Tablet, Oral (1)ea Three Times a Day	09/02/2016	10/01/2016
Benztropine Mesylate	- 2MG, Tablet, Oral (1)ea Each Morning	09/17/2015	10/16/2015
fluPHENAZine HCl	- 5MG, Tablet, Oral (1)ea At Bedtime	09/17/2015	01/14/2016
Aspirin 81mg qAM	Non-prescribed, dosage unknown		
benazepril	Non-prescribed, dosage unknown		
carBAMazepine	Non-prescribed, dosage unknown		

Recent 10 Vitals

Recorded	BP (mmHg)	WT (lbs)	HT (in)	BMI
09/23/2016	100/70	0	0	0
09/23/2016	100/70	0	0	0
09/23/2016	100/70	0	0	0
09/17/2015	100/70	200	71	27.9
09/17/2015	130/85	280	71	39
08/19/2015	135/85	290	71	40.4
07/04/2015	11/1	123	71	17.2
07/04/2015	100/100	180	64.5	30.4
06/03/2015	110/80	220	71	30.7
05/05/2015	130/95	250	71	34.9

Lab Results

Name: TESTCLIENT,SUMMARY ID: 000000001 Gender: Female DOB: 07/01/1980 Age: 36

Start Date: 04/11/2016 End Date: 04/11/2017 Filter By: No Filter Lab Test:

Lab Test	Collection Date	Results	Flag	Ref Range	Status	Clinician	C
Amphetamines as drug screen confirmation (PRIOR AUT							
amph	02/08/2017	positive 1000	> - Above absol	5	F - Final results; results stored	borden, sherri ()	Hea

May 2017   Page 2

Slide Bar: You can re-size a form or chart view by using the magnifier slide bar. This is located at the bottom right hand corner of the form or chart view. Unfortunately, you cannot re-size the home view.

Light Bulbs: There are light bulbs on many fields within Avatar that provide additional information about how to complete the field. By hovering over the light bulb, you will get preview of the contents. By clicking the light bulb, a new window will open with the full contents of the additional information.

SF HEALTH NETWORK
SAN FRANCISCO DEPARTMENT OF PUBLIC HEALTH
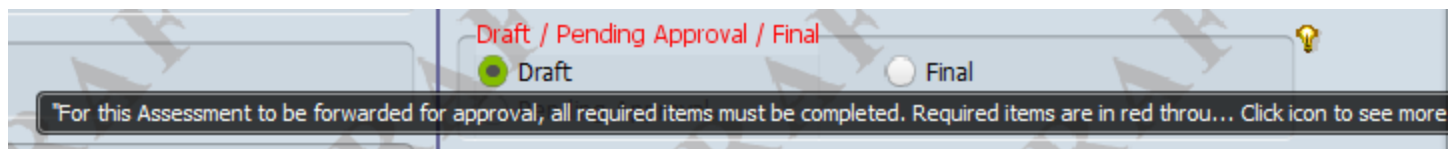
Quick Buttons are located under the "Submit" button on every form
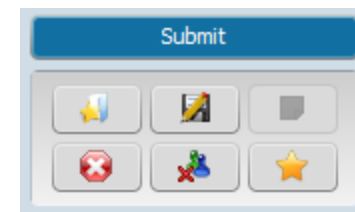
Save this form to "My Forms": My forms in Avatar are like favorites in Windows

Save as you go: You can save as you go by clicking the icon that looks like a floppy disk

This function is not available.

Exit the form without saving: You can exit without saving by clicking the icon that looks like a stop sign.

Close all forms for the client: You can simultaneously close all forms related the specific client that you are working on by clicking the icon that has an "X" with Sorry game pieces.

Temporarily add client to "My Clients": You can add a client to "My Clients" widget by clicking the icon that looks like a star. Note that this will only last until you log out. Once you log out, your client list will be return to those clients for whom you are listed as either the Admitting/Primary Clinician or Attending Physician.

Keyboard Shortcuts: are used in order to save on mouse clicks. You can use:

- Tab to move your cursor to the next field: Click the "Tab" button
- Ctrl C to Copy: hold the "Ctrl" button and press the letter "c"
- Ctrl V to Paste: hold the "Ctrl" button and press the letter "v"
- Ctrl X to Cut: hold the "Ctrl" button and press the letter "x"
- Ctrl A to Select All: hold the "Ctrl" button and press the letter "a"
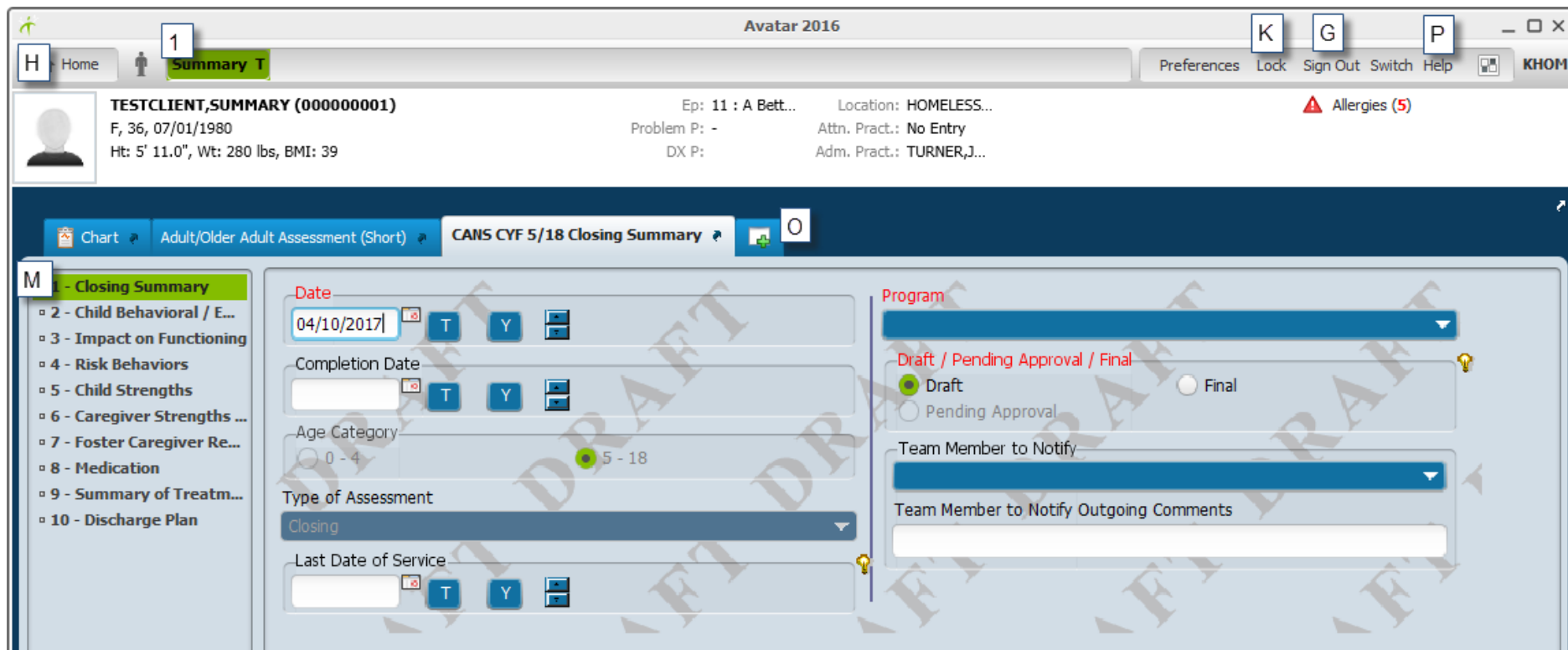
Clearing a field: if you inadvertently selected a radio button and you want to clear you selection (i.e.: leave that field blank), you can use the function key F5, which is located on the top of your keyboard

- F5
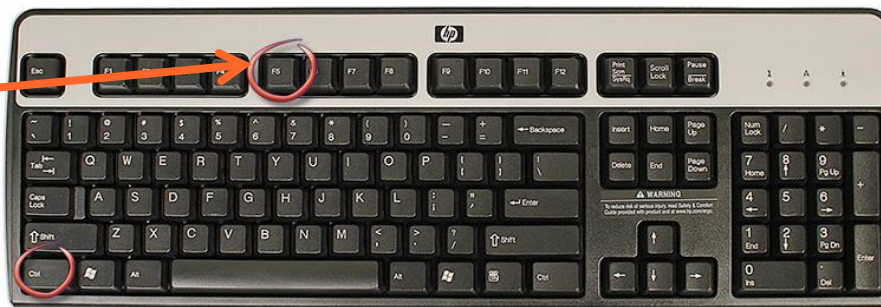
Alt Button: When you click the "Alt" button, the Alt shortcuts will display.

For example, you can Sign Out

by clicking "Alt" and "G".

Text Editor: You can get to the text editor from any free text field by clicking the icon of a pencil and paper. This will open a new window.
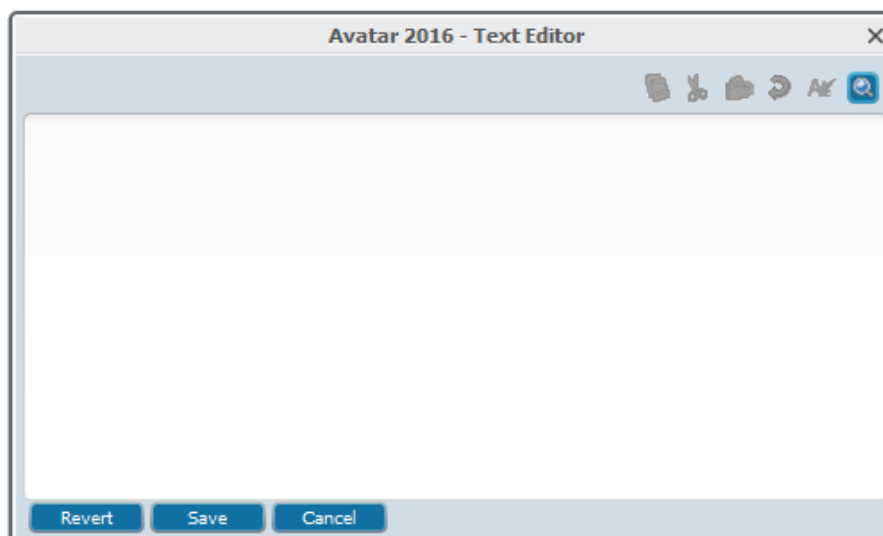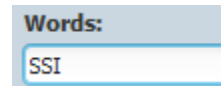
From here, you can use Copy, Cut, Paste, Undo, Spell Check, and Search

Add a word or phrase to Spell Check: You can permanently add a frequently used word of phrase to the Spell Check within Avatar.
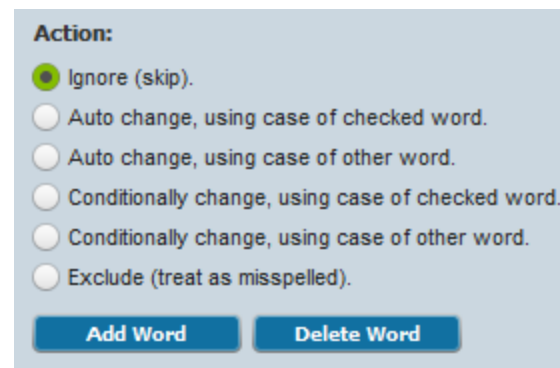
1. Click "Preferences" at the top right hand corner of the Avatar window.

Preferences   Lock   Sign Out   Switch   Help

2. Type the word you want to add in the "Words" field. Note that it will be case sensitive.

Words:

SSI

3. Ensure that "Ignore (skip)" is selected.

Action:

◉ Ignore (skip).
◯ Auto change, using case of checked word.
◯ Auto change, using case of other word.
◯ Conditionally change, using case of checked word.
◯ Conditionally change, using case of other word.
◯ Exclude (treat as misspelled).

Add Word   **Delete Word**

4. Click "Add Word"
5. "Apply" to save your changes.

Apply   **Dismiss**

Templates: are used to save you from re-typing information and remind you of prompts.

System Templates: have been created for your convenience. Access system templates by right clicking in a free text field [e.g.: Progress Notes (Group and Individual)]

Menu		Templates
		PIRP
		DAY TREATMENT - DAILY
		DAY TREATMENT - WEEKLY
		SOAP
Cut	Ctrl+X	PF NOTE
Copy	Ctrl+C	Psychiatric Assessment Progress Note
Paste	Ctrl+V	DAP Template for SA Providers
Delete	Delete	SOAP (Meds)
SpellCheck	F7	Antipsychotic Polypharmacy Progress Note
Select All	Ctrl+A	FMP Child and Family Tx Team Meeting
		E/M Code/Psychiatric Reassessment
System Templates	▶	
User Defined Templates	▶	
Widget Templates	▶	

If you have already entered text, you will be asked if you would like to replace, append, or cancel.

- Replace will erase your previous entry.
- Append will add the template following the entered text.
- Cancel will not add a template.

User Defined Templates: Create your own templates with the by following these steps

1. Right click in a free text field and clicking "User Defined Templates"

2. Scroll to "Manage"

3. You can name your template

4. Drag elements from Available Fields into your template
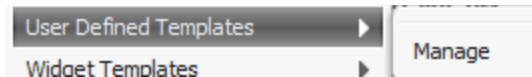
5. You can also organize your templates into groups

Date Field: In any Avatar Date Field, if you enter "t" for today plus or minus a number, Avatar will calculate the date. For example, if today is April 13, 2017 and "t-30" is entered into a date field, Avatar will calculate that 30 days ago was March 14, 2017.
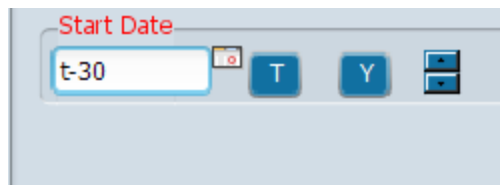
Exporting reports: You can export reports by clicking on the icon that looks like a floppy disk.
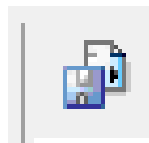
1. **Identity According to Medi-Cal:** All of the following must EXACTLY match Medi-Cal records in order to successfully claim to Medi-Cal.

    a. First Name (including any hyphens)

    b. Last Name (including any hyphens)

    c. Middle Name (including any hyphens)

    d. Suffix (Jr, Sr, etc.)

    e. Gender

    f. CIN number

2. **Selecting the Correct Program:** Please take extra care to select the correct episode and program. In Progress Notes (Group and Individual), once you select the episode, the program will automatically select the program associated with that episode.

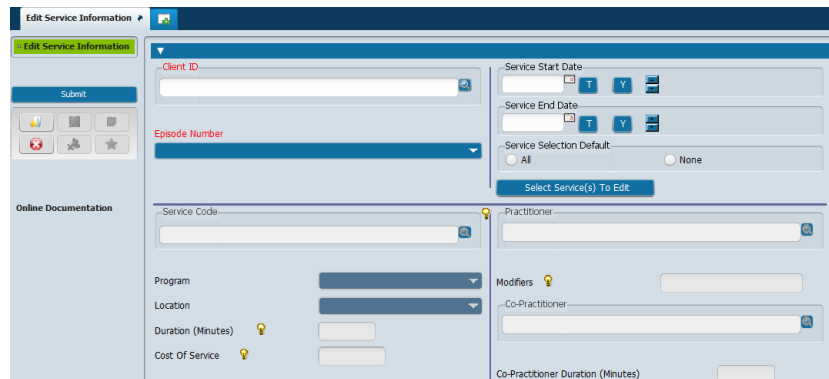**3. Diagnosis:** There is a separate handout available with details. Also see section in this document regarding making corrections

    a. Ensure that the diagnosis covers the date of admission by selecting "Type of Diagnosis" = "Admission." This will default the Date of Diagnosis to the admission date.

    b. In order to make the diagnosis print out in the Assessment Report, "Add" a new entry when assessment is completed. Select "Type of Diagnosis" = "Update." Use a Date of Diagnosis that is greater than or equal to the date of assessment.

    c. Review the DHCS list of covered diagnoses

    d. The diagnosis that is sent on the claim will be the last entered diagnosis.

4. Add Duplicate Modifiers: Have a process for reviewing the "Possible Duplicates Services by Program Report" and adding the necessary modifier to BOTH potential duplicates using "Edit Service Information"

    a. HE,76 = Repeat Procedure by Same Person

    b. HE,77 = Repeat Procedure by Different Person

Once entered, the following elements cannot be changed in Avatar because in they become part of the serial number for that entry. This is part of the Netsmart table structure that is part of the system design.

1. Client

2. Episode

3. Date

Edit Service Information: If the service is open (not yet claimed) you can use this screen to change any of the following:

1. Service code
2. Program of service
3. Location
4. Duration (Face to Face, Doc and Travel, and Total)
5. Practitioner
6. Co-Practitioner
7. Co-Practitioner time (Face to Face, Doc and Travel, and Total)
8. Evidence-Based Practices
9. Add Duplicate Modifier
10. Tip: You can select multiple services to edit simultaneously

1. **Incorrect Date of Diagnosis:** Since date is an element that cannot be changed in Avatar once entered, in order to correct the date of diagnosis, you must Add a new diagnosis entry with the correct date.

2. **Incorrect Diagnosis:** If the dates are okay, you can edit an incorrect diagnosis by selecting the specific entry and making edits below.

Pop Out a Window: From the Chart View, you can pop out a widget into its own window by clicking the icon of an arrow shooting up and out

This image shows how the Progress Note Widget appears as a separate window.
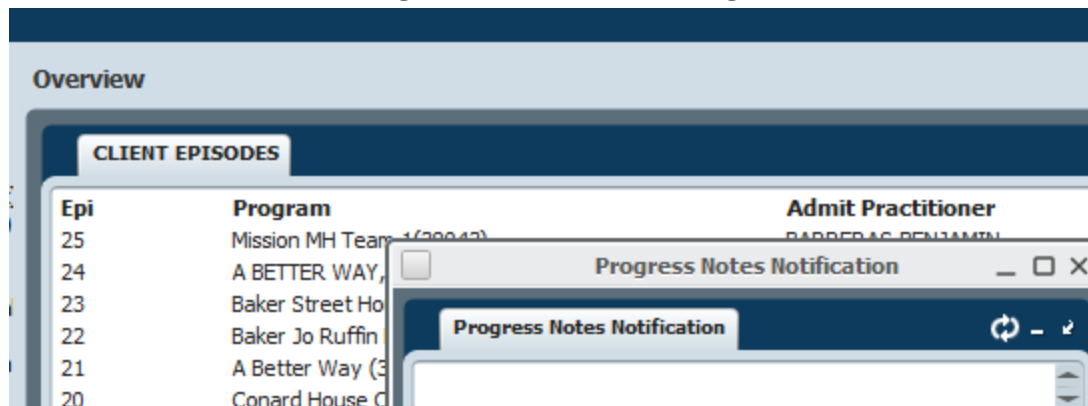
Pop the window back in by clicking the icon of an arrow shooting down and in

In our experience, people open accidentally pop out their windows and may get stuck with open windows. If that happens, we suggest reloading the chart.

Reload the chart: If you have lost your windows, you can reload the chart by clicking the icon that looks like a checker board.
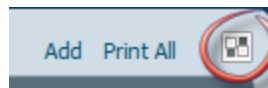
This will open a new window. Click "Reload Chart" and "Submit" in order to revert to the original Chart View.