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
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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 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
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.
**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.

![Slide Bar Image]

**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.

![Light Bulb Image]
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”.

![Keyboard Image]

**Forms**

**SF HEALTH NETWORK**
SAN FRANCISCO DEPARTMENT OF PUBLIC HEALTH

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**TESTCLIENT,SUMMARY (00000001)**
F: 36, 07/01/1980
Ht: 5'11.0", Wt: 280 lbs, BMI: 39

**Avatar 2016**

**CAIRS CYF 5/18 Closing Summary**

**Date**: 04/10/2017

**Completion Date**: [Field]

**Age Category**: 5 - 18

**Type of Assessment**: [Field]

**Last Date of Service**: [Field]

**Program**

- **Draft / Pending Approval / Final**
  - Draft
  - Pending Approval
  - Final

**Team Member to Notify**

**Team Member to Notify Outgoing Comments**
**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 or phrase to the Spell Check within Avatar.

1. Click “Preferences” at the top right hand corner of the Avatar window.

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

3. Ensure that “Ignore (skip)” is selected.

4. Click “Add Word”

5. “Apply” to save your changes.
**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)]

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.

![Start Date](image)

**Exporting reports:** You can export reports by clicking on the icon that looks like a floppy disk.

![Export Icon](image)
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 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.