

Transfer Practitioner Caseload and Refresh Caseload User Guide



City and County of San Francisco

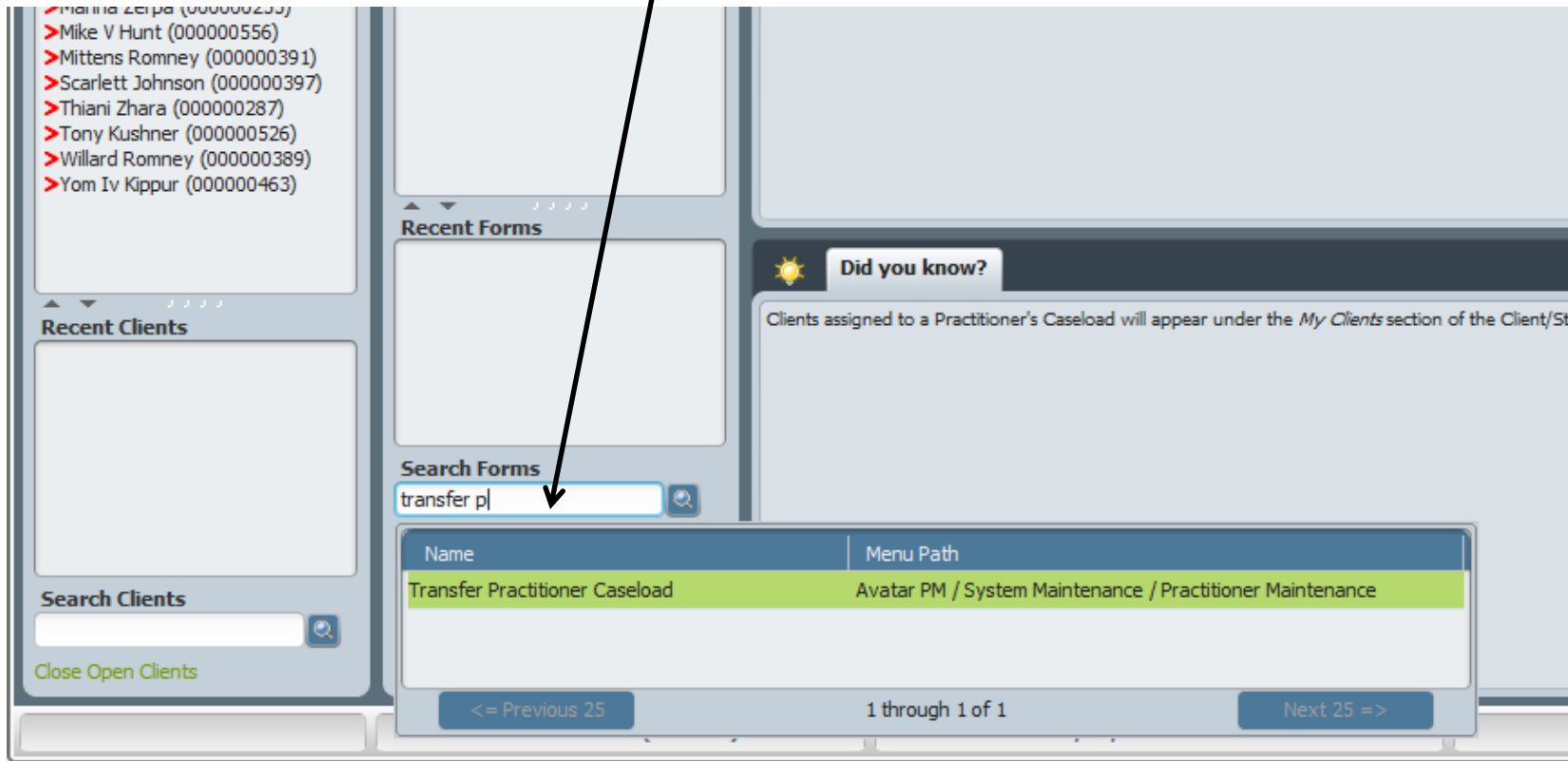
Purpose

The purpose of Transfer Practitioner Caseload is to move clients from one practitioner caseload to another. This document will guide you through the process.

Below is a display of “My Clients” (client caseload) that appears on the clinician’s home page. All clients listed have the selected clinician as “admitting” or “attending” practitioner on the “Admission” or “Admission (Outpatient)” form.

The screenshot displays the Avatar 2011 web application interface. The top navigation bar includes a 'Home' button and a menu with 'Courses', 'Preferences', 'Lock', 'Sign Out', 'Switch', and 'Help'. The user's name 'JHEPWORTH' is visible in the top right corner. The main content area is divided into three columns. The left column features a 'Client' tab and a 'My Clients' widget with a list of client names and IDs, including Carlos Fuentes (981248689), Cesar Chavez (000000393), Chanelle Aryasingha (000000582), Collin Woodard (981324111), Darrel Dobo (000000261), Edith Grosman (9813456), Gertrude Stein (0000003), Grape Ms Apple (000000574), Helen Wu (000000395), and Janice Alden (000000180). A tooltip for Carlos Fuentes shows 'Compliance: NO'. Below the list are sections for 'Recent Clients' and 'Search Clients'. The middle column contains a 'Forms & Data' widget with 'My Forms' (Option Bundler, CYF Treatment Plan of Care, Diagnosis, Adult/Older Adult Assess Long w/DX, Diagnosis), 'Recent Forms', and 'Search Forms'. The right column has a 'Message Center' with an 'Effective Date: 05/17/2013' and a notice: 'Avatar will be off-line Sunday from 5AM-7AM.' Below the message center is a 'Did you know?' section with a tip about the 'My Forms' section. The bottom status bar shows 'AVCALPMLIVE (SAMPLE)', the date and time '12/18/2013 11:26 AM', and a refresh button.

Transfer Practitioner Caseload can be found by searching at "Search Forms".



Searching for the Transfer Practitioner Caseload form

The Transfer Practitioner Caseload Screen:

1: Select either Admitting Practitioner Caseload or Attending Practitioner Caseload Type.

Note: Attending Practitioner refers to MD (physician).

The screenshot shows the 'Transfer Practitioner Caseload' form in the Avatar 2011 application. The form includes a 'Caseload Type' section with radio buttons for 'Admitting Practitioner Caseload' (selected) and 'Attending Practitioner Caseload'. Below this are two dropdown menus: 'Transfer Caseload From' (containing 'AVATAR19 TEST (000102)') and 'Transfer Caseload To' (containing 'AVATAR22 TEST (000105)'). To the right, there is a section for 'Individual Or All Clients' with radio buttons for 'All' and 'Individual' (selected). A 'Select Clients To Transfer' button is located below these options. The form also includes fields for 'Effective Date Of Transfer' and 'Effective Time Of Transfer'. The application window title is 'Avatar 2011' and the user is identified as 'JHEPWORTH'. The status bar at the bottom shows 'AVCALPMLIVE (SAMPLE)', the date '12/18/2013 11:28 AM', and a zoom level of '100%'.

2: Select practitioner you want to transfer clients from.
3: Select practitioner you want to transfer (move) clients to:

5: If selecting Individual clients to transfer, click button to select client names (see next page).

4: Select All clients or individual clients for transfer to new practitioner.

Searching for the Transfer Practitioner Caseload form

Selecting clients for transfer:

6: Check-mark next to client names you want to transfer.
Then click "OK" to submit.

Avatar 2013

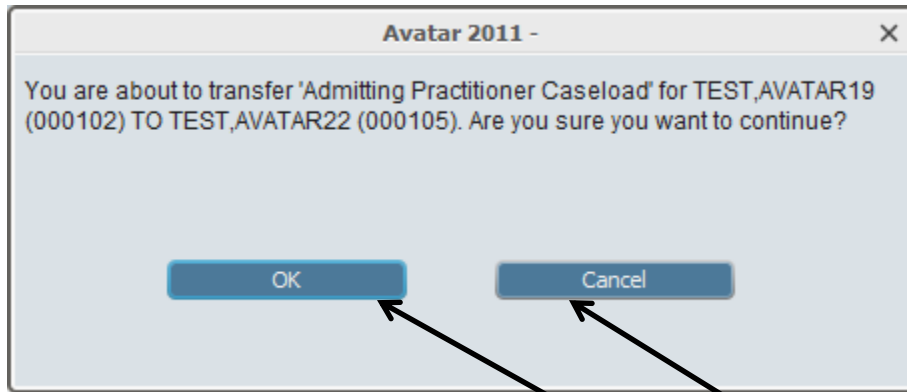
Practitioner: TEST, AVATAR13 (000102)

Caseload Type: Admitting Practitioner Caseload

Client	Episode	Program	Admit Date
<input checked="" type="checkbox"/> 778	1	South of Market Outpatient	07/16/2013
<input type="checkbox"/> 981414144	1	Westside Outpatient Clinic	07/23/2013
<input type="checkbox"/> 785	1	South of Market Outpatient	07/26/2013
<input checked="" type="checkbox"/> 981111111	1	Westside Outpatient Clinic	08/27/2013
<input type="checkbox"/> 981212345	1	Westside Outpatient Clinic	07/16/2013
<input type="checkbox"/> 458	1	Westside Outpatient Clinic	09/28/2012
<input type="checkbox"/> 981032323	1	Westside Outpatient Clinic	02/13/2013
<input checked="" type="checkbox"/> 981234987	1	DSAAM OTOP Meth Detox (381	02/13/2013
<input type="checkbox"/> 981879345	1	Westside Outpatient Clinic	06/11/2013
<input type="checkbox"/> 838	1	Westside Outpatient Clinic	09/13/2013
<input type="checkbox"/> 283	2	Jewish Family Child Scott	01/10/2013
<input type="checkbox"/> 751	1	Westside Outpatient Clinic	06/12/2013
<input type="checkbox"/> 981982983	1	Westside Outpatient Clinic	07/23/2013
<input type="checkbox"/> 815	1	Westside Outpatient Clinic	08/20/2013

OK Cancel

Verification of intent:



7: This warning message asks if you are sure you want to transfer clients from caseload of one clinician to another. Then click "OK" to submit. Or click "Cancel" to escape.

Refresh Caseloads:

“Refresh Caseloads” performs two tasks:

- 1: Updates changes to **Practitioner Caseload**.
- 2: Restores correct display of clients in **My Clients** window (on Home page).

The screenshot shows the Avatar 2011 user interface. The top navigation bar includes 'Home', 'Courses', 'Preferences', 'Lock', 'Sign Out', 'Switch', 'Help', and the user name 'JHEPWORTH'. The main content area is divided into three columns: 'Client', 'Forms & Data', and 'Message Center'. The 'Client' column contains a 'My Clients' list with names and IDs, and a 'Search Clients' field. The 'Forms & Data' column contains a 'My Forms' list and a 'Search Forms' field. The 'Message Center' column contains a message about system downtime and a 'Did you know?' section. A search results window is open at the bottom, showing a single result for 'Refresh Caseloads' with the menu path 'Avatar PM / System Maintenance / Practitioner Maintenance'. Two arrows point to the search results: one from the 'Refresh Caseloads' text in the list above, and another from the 'Search Forms' field.

Avatar 2011

Home Courses Preferences Lock Sign Out Switch Help JHEPWORTH

Client Staff

My Clients edit

- > Carlos Fuentes (981248689)
- > Cesar Chavez (000000393)
- > Chanelle Aryasingha (000000582)
- > Collin Woodard (981324111)
- > Darrel Dobo (000000261)
- > Edith Grosman (981345651)
- > Gertrude Stein (000000388)
- > Grape Ms Apple (000000574)
- > Helen Wu (000000395)
- > Janice Alden (000000180)
- > Jim Harrison (000000837)
- > John Gottschall (981246986)
- > Jon Ross (981123445)
- > Juan M Perez (932542189)
- > Julia Velasquez (000000400)

Recent Clients

Search Clients

Close Open Clients

Forms & Data

My Forms edit

- Option Bundler
- CYF Treatment Plan of Care
- Diagnosis
- Adult/Older Adult Assess Long w/DX
- Diagnosis
- Notification Users
- Notifications Setup
- CANS CYF Initial Assessment Rpt
- Adult/Older Adult TPOC/Reassess w/ Program Maintenance

Recent Forms

- Transfer Practitioner Caseload

Search Forms

refresh

Message Center

Effective Date: 05/17/2013

Avatar will be off-line Sunday from 5AM-7AM.

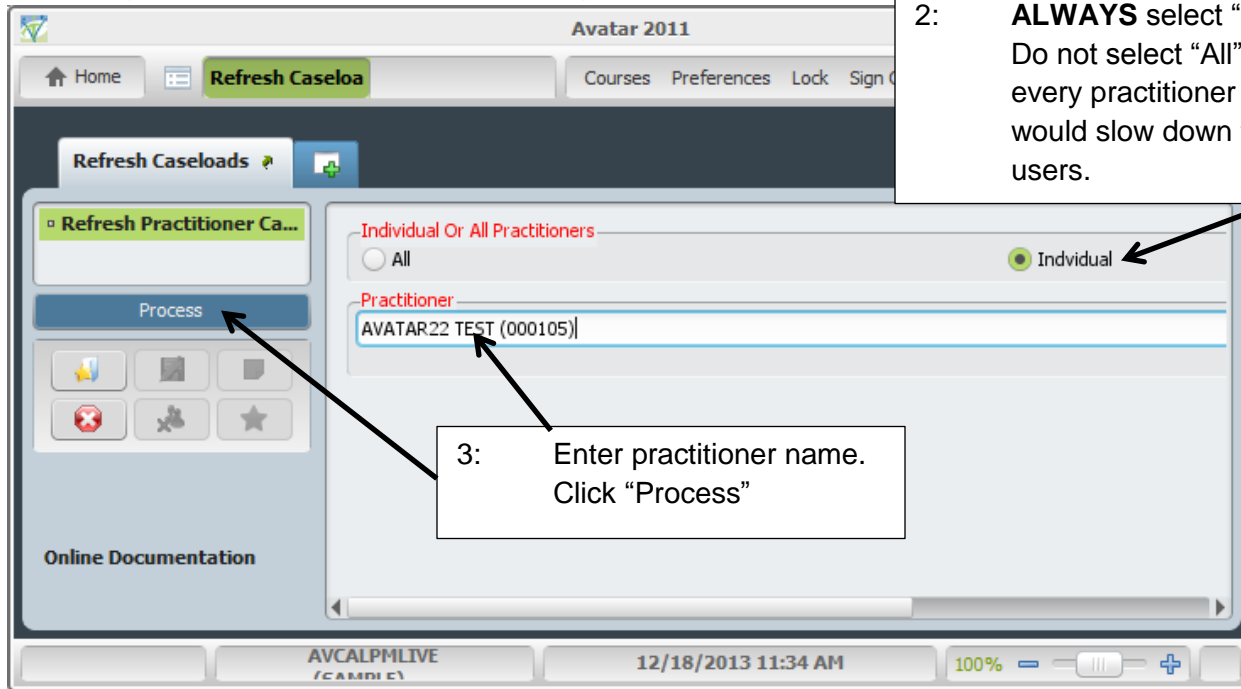
Did you know?

Users have the ability to refresh widgets, minimize the widget screen, and even undock widgets during their application session. This is accomplished by utilizing the icons on the upper right of the Widget.

Name	Menu Path
Refresh Caseloads	Avatar PM / System Maintenance / Practitioner Maintenance

<= Previous 25 1 through 1 of 1 Next 25 =>

Selecting practitioner name for refreshing caseload:



2: **ALWAYS** select "Individual" caseload. Do not select "All", as this would refresh every practitioner in the system – and would slow down the system for other users.

3: Enter practitioner name. Click "Process"

Below is Practitioner Caseload Report:

PM_Practitioner_Caseload_Information.rpt			
100% 1 of 1			
Page 1 of 1		Run Date : 12/18/2013	
San Francisco DPH 1380 Howard St San Francisco, CA 94015			
Practitioner Caseload Information Report			
Practitioner	Client	Episode	Program
TEST_AVATAR22 (000105)			
Admitting Practitioner Caseload			
	BAKER,SUSAN (9815234)	1	Westside Outpatient Clinic (89052)
	BANNER,DAVID B DR (778)	1	South of Market Outpatient (38719)
	BOOBOO,NANANA (981732145)	1	Westside Outpatient Clinic (89052)
	GINSBERG,AL (981234675)	1	DSAAM OTOP Meth Detox (38143)
	HERRERA,NANCI (9811111111)	1	Westside Outpatient Clinic (89052)
	LOPEZ,ANAMARIA (353)	2	La Posada Outpatient (3808OP)
	NABU,ARIEL (981234987)	1	DSAAM OTOP Meth Detox (38143)
	PAN,PETER (913)	1	Westside Outpatient Clinic (89052)
	RODGERS,JACOB G (981000257)	1	Westside Outpatient Clinic (89052)
	SIMPSONS,HOMER (981324423)	1	Westside Outpatient Clinic (89052)
	TEA,GREEN (824)	1	Westside Outpatient Clinic (89052)
Attending Practitioner Caseload			
	CK,LOUIS (918273645)	1	Westside Outpatient Clinic (89052)
	GARCIA,ISABEL (981756756)	1	Westside Outpatient Clinic (89052)
	GOTTSCHALL,JOHN (981246986)	1	Westside Outpatient Clinic (89052)

END