

# City and County of San Francisco



## Avatar User Guide

Specialty Training – Workflow for  
Supervising Clinicians

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## Workflow Terminology

<b>Workflow</b>	Workflow is used in CWS, and generates a TO DO list for users. Some options have workflow and enable a user to send their work for review to another user.
<b>Draft</b>	In workflow, this allows for a user to save data to the database as a draft, to be completed at a later date.
<b>Pending Approval</b>	In workflow, this allows a user to complete the option and forward the information to another user's 'to do' list for review. The reviewing user will have the ability to accept or reject the submission, noting the reason.
<b>Final</b>	In workflow, this allows for the user to complete the data and make it a permanent and unchangeable part of the database.
<b>Pre-Display</b>	Some options have pre-displays, which enable the user to pick previous instances of administrations of that option. Finalized instances of the option can be opened in edit mode, but changes will not be saved. To start a new instance, click 'ADD'.

## Types of Workflow

### ➔ Draft / Pending Approval / Final

- Used for Assessments and Treatment Plans
- Has the functionality to 'Approve or Not Approve'
- Can cycle thru Draft / Pending Approval status

### ➔ Draft / Final Co-Sign

- Used for Progress Notes
- Note is either in Draft or Final only. There is NO 'Pending Approval' status. Can only 'Co-sign.'
- Can NOT cycle thru a Draft / Pending Approval status

## Required Users

- ➔ MHAdClin1
- ➔ MHChClin1
- ➔ SAAdClin1
- ➔ SACHClin1

## Progress Note Workflow (Draft/Final)

- User puts Progress Note in 'Draft' status and works on it until completed
- To-Do will appear on Clinician To-Do List
- When completed, clinician notifies 'Supervising Clinician' via SFDPH email/direct meetings that a Progress Note is completed and ready to be finalized.
- 'Supervising Clinician' runs 'Progress Note CoSign Workflow Management Review' report and reviews 'Draft' notes.
- 'Supervising Clinician' communicates with note submitter via SFDPH email or direct contact/meetings with clinician as to whether note is acceptable or not acceptable.
- If unacceptable, clinician continues to edit 'Draft' note and communicate with 'Supervising Clinician' until acceptable repeating above as necessary.
- 
- If acceptable, Clinician marks note as 'Final'\*\*.
- \*\*Service Charge entered on Client Ledger
- A Co-Sign To-Do flag is sent to 'Supervising Clinician'
- 'Supervising Clinician' co-signs notes
- To-Do item removed from 'Supervising Clinician' list.

\*\*Warning: Once note is finalized, the service charge is sent to the client ledger.

## Assessment Workflow (Draft/Pending Approval/Final)

- User put assessment in 'Draft' status and works on it until completed.
- A To-Do item will appear on Clinician To-Do List
- When completed, clinician puts assessment in 'Pending Approval'.
- To-Do item is removed from submitting user and put on 'Supervising Clinician' To-Do list
- 'Supervising Clinician' Approves 'Yes or No'.
- If 'Yes', assessment is made 'Final'
- If 'No', assessment is put back into 'Draft' status and sent back to submitting user To-Do list and removed from Supervising Clinician To-Do list.
- Submitting user makes necessary correction and puts assessment back in 'Pending Approval'.
- Workflow cycles until Supervising Clinician 'Approves'.

## Treatment Plan Workflow

- Similar to Assessment workflow

# To Do List

## Purpose:

The To Do List is one of the Main Icon across the top of the Home Page. It is the central repository for To Do items created as part of the Workflow process.

The My To Do Task displays the current user's To Do items in the Active Task Frame. The My To Do List Window displays the My To Do List Folder that contains sub-folders with the days and dates that the To Do Items were sent. Opening the sub-folder displays that day's individual To Do items. Each item displays the time the To Do was sent, the associated Client, and a brief description of the task, and the Sender.

From the My To Do List Window the user can perform the following tasks:

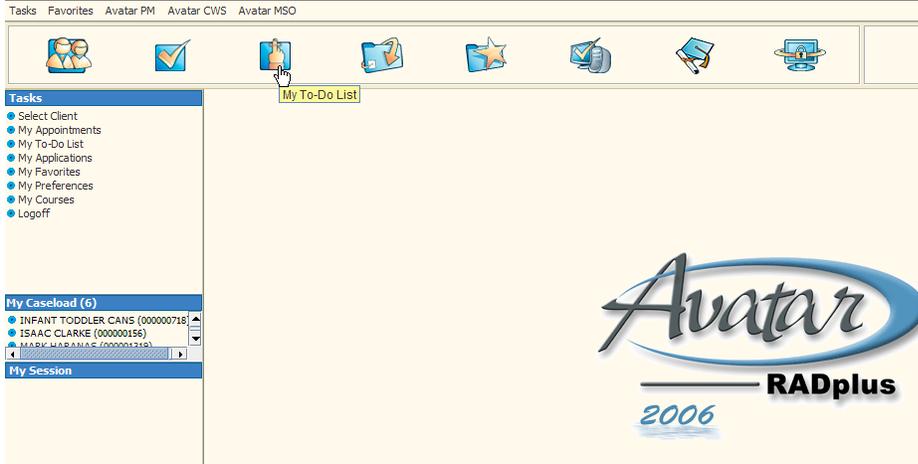
- Open the option associated with the To Do Item- For those To Do items that use options that are not included in this functionality, the system directs the user to open the appropriate option.
- Refresh the To Do listings to include any To Do items sent and remove all To Do items completed during the user's current session. This is performed using the right-click Navigation Menu or clicking the Refresh button.

# Navigating the My To Do List Window

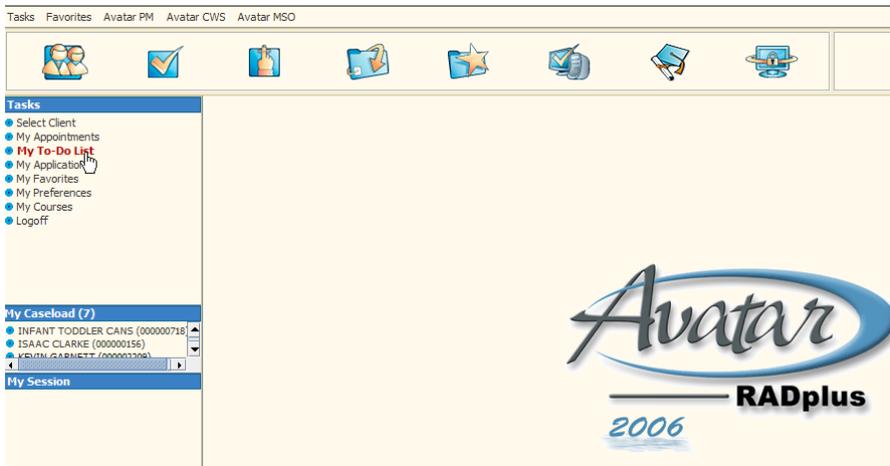
## Home Page Access



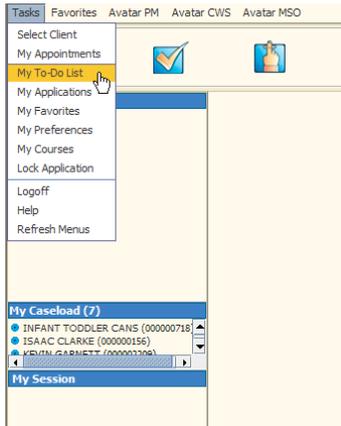
You can access the My To Do List from the Home Page by clicking on the icon.



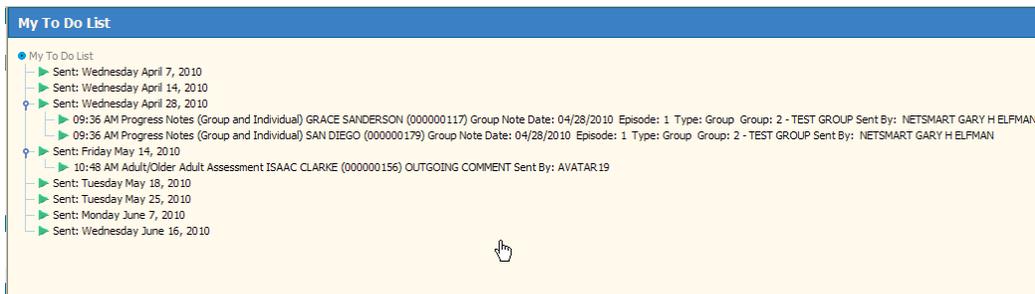
You can access the My To Do List from the Home Page by clicking on the menu item in the Task List section



You can access the My To-Do List from the Home Page by selecting the Tasks menu item and then selecting the My To-Do List menu item



## Opening and closing the To-Do List Menu Tree



There are several ways to open and close the folders.

- Double-click the specific folder or sub-folder
- Right-click the specific folder or sub-folder to display the Navigation Menu and left-click the Open or Close command.
- Left-click the Toggle associated with the specific sub-folder.

To-Do List buttons:

- The Refresh button adds To-Do Items to the folders that were created during the user's current session.
- The Dismiss button closes the To-Do List and returns you back to the Home Page.



## Action Menus within the My To Do List Window

- The Action Menu is available by right-clicking the specific To Do Item (Figure2-27). The menu provides the user with the following command:
  1. Open- Depending on the To Do type, clicking Open either enables the user to complete the To Do by navigating to the associated option or provides a message box to inform the user to open the associated option for the selected To Do item.
  2. View Details- Clicking View Details generates a report that contains the details associated with the selected To Do item.
  3. Enter Option – The user can open the actual form item for editing.
  4. Enter Post-it Note – The user can put a note attached to the To-Do item.

## Types of To-Do items

- **Group Note Completed and an Individual Note is required (User)**

- Who will receive this:

This would display on any User/Clinician that had written a Group Progress Note and now needed to write/customize the individual group members notes.

- How is it displayed:

It will have the keywords 'Type: Group' in the item



Note: You will not be able to open the item directly from the To-Do List item. Access the option directly thru 'Progress Note (Group and Individual)

- Access Options

No right click or double-click options. You must access the form item directly from the menu or other methods.

- What it means:

You have completed a group note where that particular client was in attendance and you need to write an individual note for that client's attendance.

- What you need to do:

Access 'Progress Note (Group and Individual)' and write an individual note for the group member

## • Individual Note is required (User)

### - Who will receive this:

This would display on any User/Clinician that had written an Individual Progress Note it is in 'Draft' status and needs to be edited/finalized.

### - How is it displayed:

It will not have the keywords 'Type: Group' in the item

Sent: Wednesday April 7, 2010  
04:09 PM Progress Notes (Group and Individual) GRACE SANDERSON (000000117) Group Note Date: 04/07/2010 Episode: 1 Type: Group Group: 2 - TEST GROUP Sent By: NETSMART GARY H ELFMAN  
04:09 PM Progress Notes (Group and Individual) SAN DIEGO (000000179) Group Note Date: 04/07/2010 Episode: 1 Type: Group Group: 2 - TEST GROUP Sent By: NETSMART GARY H ELFMAN

Note: You will not be able to open the item directly from the To-Do List item. Access the option directly thru 'Progress Note (Group and Individual)

### - Access Options

-- Double click opens the To-Do item only, not the form. Only allows you to manage the To-Do, not the form.

-- Right click to access the Post-it choice

-- You must enter the actual form via normal access methods to complete the Note

### - What it means:

You have an Individual Progress note to complete.

### - What you need to do:

Access 'Progress Note (Group and Individual)' and edit/complete the individual note.

## • Co-sign needed for To-Do item (Supervising Clinician)

### - Who will receive this:

This will be received by a Supervising Clinician and signifies that that a Co-signature is required for a Progress Note.

### - How is it displayed:

It will have the keywords 'Co-sign' in the item description.

Sent: Wednesday April 14, 2010  
11:33 AM Progress Notes (Group and Individual) ISAAC CLARKE (000000156) Co-Sign CYF Daily Day Treatment Cosign For Episode 1 Sent By: NETSMART GARY H ELFMAN

### - Access Options

-- Double click opens the To-Do item only, not the form. Only allows you to manage the To-Do, not the form.

-- Right click to access the 'Open' choice to actually co-sign item.

-- Right click to access the 'View Details' choice

- What it means:

You will need to review and Co-sign the progress note.

- What you need to do:

1. Run the 'Progress Note Workflow Management Report'
2. Determine which co-sign notes can be co-signed and which need to be further work
3. Co-sign / or notify user of additional work

• **Assessment in 'Draft' and needs additional work or to be Finalized**

- Who will receive this:

The user who wrote the note will receive a To-Do item to remind them to complete/Finalize the assessment

- How is it displayed:

Will contain the words 'assessment and 'in Draft status'

Sent: Thursday July 8, 2010  
09:44 AM CANS CYF Initial Assessment ISAAC CLARKE (000000156) THIS IS THE COMMENT FOR DRAFT Sent By: NETSMART GARY H ELFMAN in Draft status

- What it means:

An assessment is in 'Draft' status and needs further work/finalization

- What you need to do:

Enter the option and continue editing/completing form

- Access Options

-- Double click opens the To-Do item only, not the form. It only allows you to manage the To-Do list.

-- Right click to access the 'Enter Post-it Note' choice

-- Right click to access the 'Enter Option' choice. View actual form for editing.

-- Right click to access 'Open' choice. Same as double clicking. Opens the To-Do item only, not the form. It only allows you to manage the To-Do list.

## •Assessment in 'Pending Approval' and needs to be approved/'Finalized'

### - Who will receive this:

A supervising clinician that need to 'Approve/Not Approve' an assesement.

### - How is it displayed:

Sent: Friday May 14, 2010  
10:48 AM Adult/Older Adult Assessment ISAAC CLARKE (000000156) OUTGOING COMMENT Sent By: AVATAR19

### - What it means:

A user has submitted an assessment for 'Approval'

### - What you need to do:

You will need to 'Approve' or 'Not Approve' item

### - Access Options

-- Double click opens the To-Do item only, not the form. It allows you to 'Approve / Not Approve' with Comment the assessment.

-- Right click to access the 'Enter Post-it Note' choice

-- Right click to access the 'Enter Option' choice. View actual form in 'Read Only' status.

## •Treatment Plan in 'Draft'

### - Who will receive this:

Any user who puts a Client Treatment Plan in 'Draft' status.

### - How is it displayed:

Will contain keywords 'Draft Client Treatment Plan'

Sent: Thursday July 8, 2010  
09:02 AM Client Treatment Plan ISAAC CLARKE (000000156) Draft Client Treatment Plan 'test treatment plan' For Reviewing Sent By: NETSMART GARY H ELFMAN

### - Access Options

-- Double click opens the To-Do item only, not the form. It only allows you to manage the To-Do list.

-- Right click to access the 'Enter Post-it Note' choice

- Right click to access the 'Enter Option' choice. View actual form for editing.
- Right click to access 'Open' choice. Same as double clicking. Opens the To-Do item only, not the form. It only allows you to manage the To-Do list.

- What it means:

There is a DRAFT Client Treatment Plan that needs addition work.

- What you need to do:

Access the form and Complete the Client Treatment Plan

•**Treatment Plan in 'PENDING APPROVAL'**

- Who will receive this:

Any user who puts a Client Treatment Plan in 'Pending Approval' status.

- How is it displayed:

Will NOT contain keyword 'Draft'

Will contain keywords 'for Reviewing'

10:25 AM Client Treatment Plan ISAAC CLARKE (000000156) Client Treatment Plan '1ST FOLLOW UP' For Reviewing Sent By: NETSMART GARY H ELFMAN

- Access Options

-- Double click opens the To-Do item only, not the form. Allows you to manage the 'Approval' 'Not Approval' process.

-- Right click to access the 'Enter Post-it Note' choice

-- Right click to access the 'Enter Option' choice. 'Read Only'

- What it means:

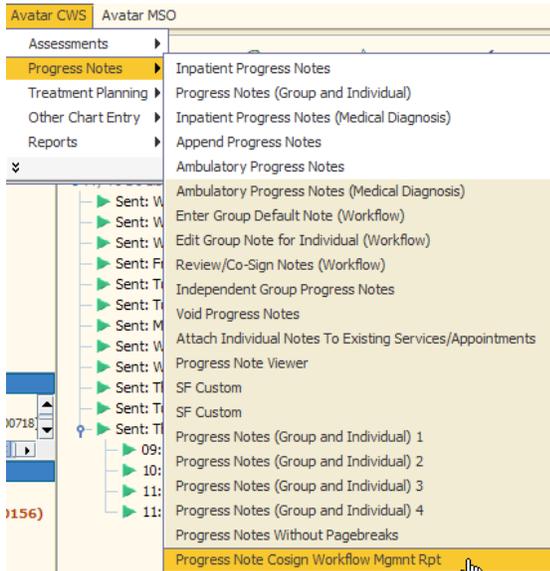
There is a Client Treatment Plan that has been placed in 'Pending Approval' status and requires 'Approval' for Finalization or 'Not Approval'

- What you need to do:

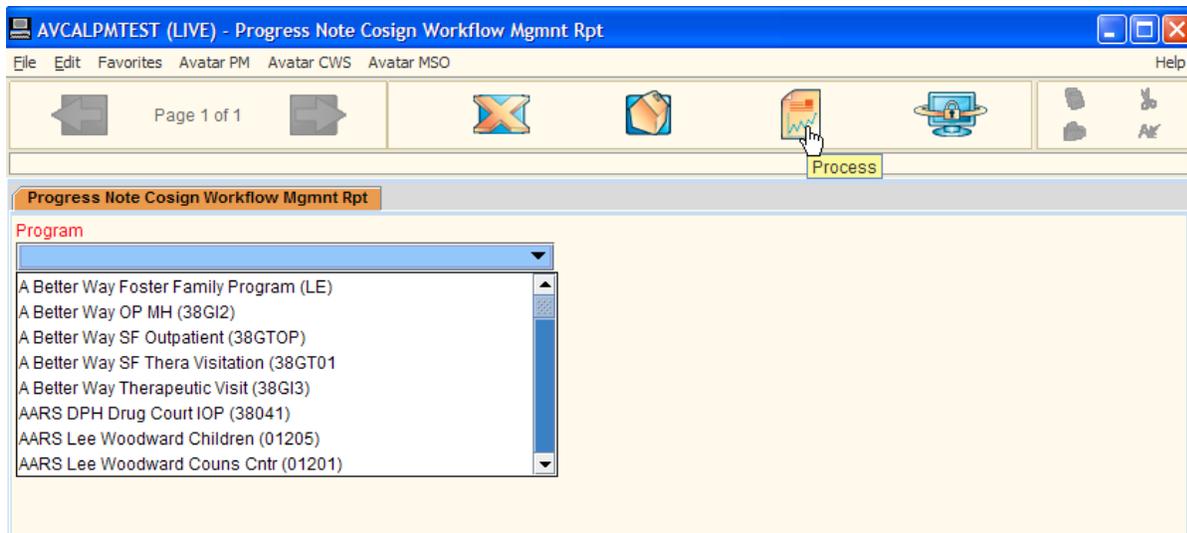
'Approve' or 'Not Approve' the Client Treatment Plan

# Running Progress Note Workflow Management Report

- Access 'Progress Note CoSign Workflow Mgmt Rpt' from the home screen in the normal way, either, menu, or search, or favorites.



- From the report screen, select the program you wish to report on and then click the 'Process' icon located at the top of the screen.



## ➔ Sample Report Output

SF Progress Note Cosign Workflow Management Report

1 / 1 100%

BusinessObjects

Preview

HILL, JAMAL

- MH Adult (Cosign)
- 6/27/2010
- HATFIELD, SAM
- NOT61907.001

7/8/2010

City and County of San Francisco  
CBHS

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**HILL, JAMAL**  
**MH Adult (Cosign)**

<b>Patient Name:</b> HATFIELD, SAM ( 1612)	<b>Episode:</b> 2
<b>Admit Date:</b> 6/7/2010	<b>Discharge Date:</b>
<b>Written By:</b> AVATAR12	<b>Written On:</b> 6/30/2010
<b>Note Type:</b> MH Adult (Cosign)	<b>Note Time:</b> 11:38 AM

**Progress Note:**  
CALEED FOR CASEMANAGEMENT. INFO

**Note Addresses Which Treatment Plan Problem:**  
Problems-> Behavioral Health Needs (Symptoms and Impairments) Goals-> Reduce the symptoms/frequency/severity of anxiety.INFO Objectives-> The objective is to be good. Interventions-> Individual.info info

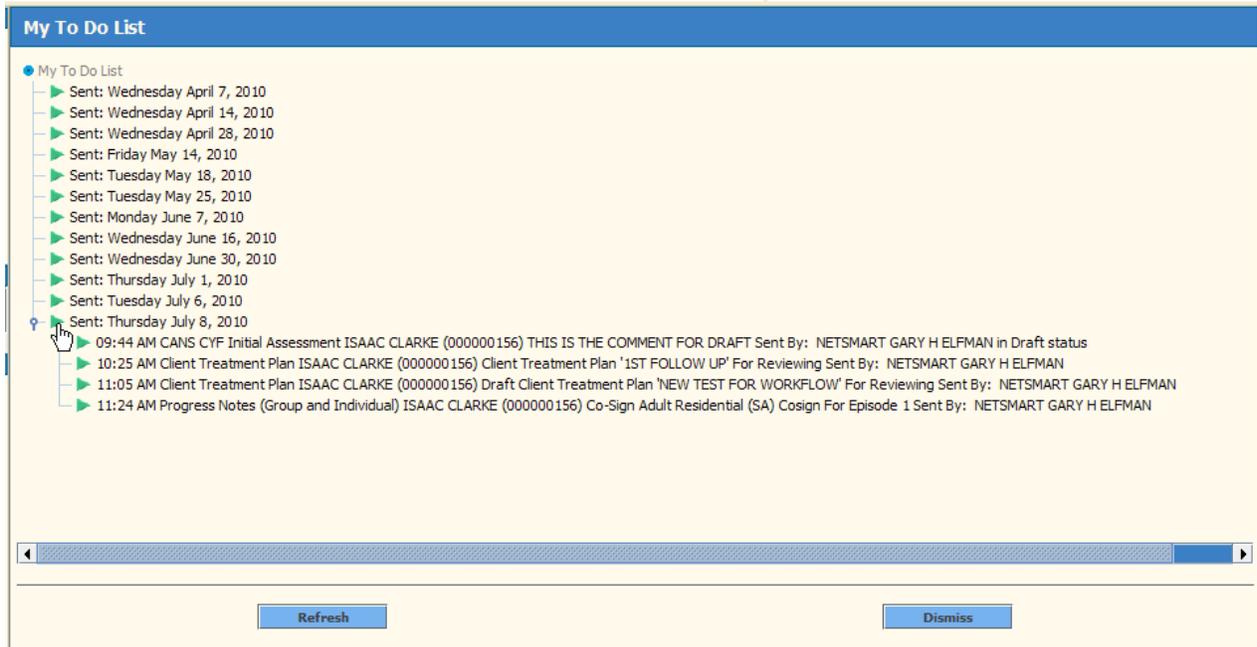
**Additional Note Written By:** On: At:



# Review Co-sign Progress Note from To-Do list

➡ Access To-Do list

➡ Navigate to date in question and open To-Do tree by double-clicking on green arrow



The screenshot shows a web interface titled "My To Do List". It contains a list of tasks, each preceded by a green arrow. The tasks are:

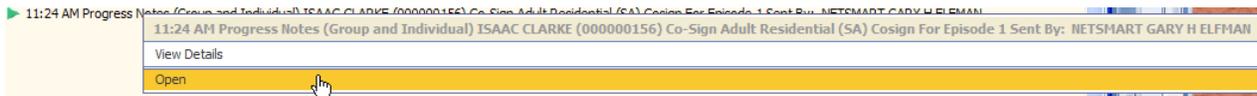
- Sent: Wednesday April 7, 2010
- Sent: Wednesday April 14, 2010
- Sent: Wednesday April 28, 2010
- Sent: Friday May 14, 2010
- Sent: Tuesday May 18, 2010
- Sent: Tuesday May 25, 2010
- Sent: Monday June 7, 2010
- Sent: Wednesday June 16, 2010
- Sent: Wednesday June 30, 2010
- Sent: Thursday July 1, 2010
- Sent: Tuesday July 6, 2010
- Sent: Thursday July 8, 2010

Below the list, there are four detailed entries for the date July 8, 2010:

- 09:44 AM CANS CYF Initial Assessment ISAAC CLARKE (000000156) THIS IS THE COMMENT FOR DRAFT Sent By: NETSMART GARY H ELFMAN in Draft status
- 10:25 AM Client Treatment Plan ISAAC CLARKE (000000156) Client Treatment Plan '1ST FOLLOW UP' For Reviewing Sent By: NETSMART GARY H ELFMAN
- 11:05 AM Client Treatment Plan ISAAC CLARKE (000000156) Draft Client Treatment Plan 'NEW TEST FOR WORKFLOW' For Reviewing Sent By: NETSMART GARY H ELFMAN
- 11:24 AM Progress Notes (Group and Individual) ISAAC CLARKE (000000156) Co-Sign Adult Residential (SA) Cosign For Episode 1 Sent By: NETSMART GARY H ELFMAN

At the bottom of the interface, there are two buttons: "Refresh" and "Dismiss".

➡ Right-click on To-Do item and select 'Open'



The screenshot shows a right-click context menu over the 11:24 AM Progress Notes item. The menu options are:

- View Details
- Open

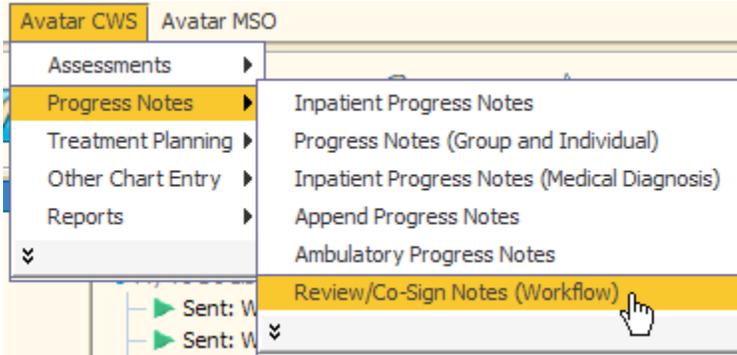
A mouse cursor is pointing at the "Open" option.

➡ At the Co-Sign screen, enter a comment, if applicable and submit the form to co-sign the Progress Note.

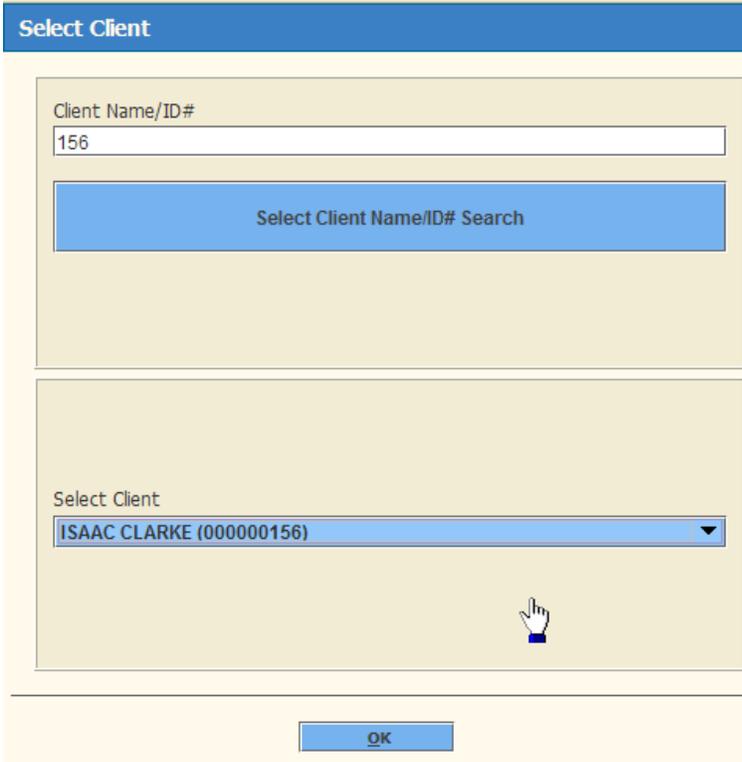
Label	Field Type	Required	Comments
Original and Appended Notes	Text Box	Display Only	This area represents the Progress Note and all Appended Progress Notes
Co-Signer's Comments	Scrolling Text Box	N	Co-Signer enters comments here.
Submit Button	ICON	Y	Submit the form to co-sign the Progress Note.

## Review / Co-sign Notes from Menu

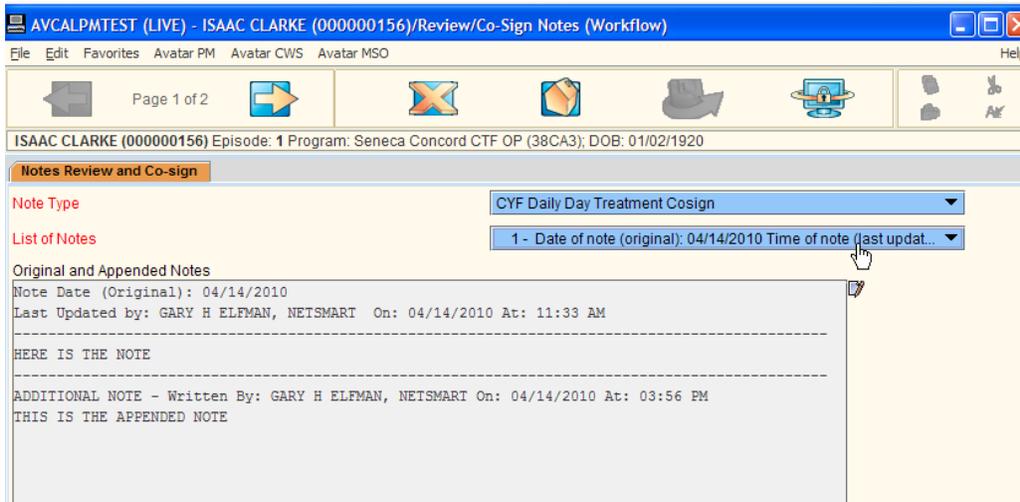
- ➔ Access 'Review/Co-Sign Note (Workflow)' the usual method, either, menu, search or favorites



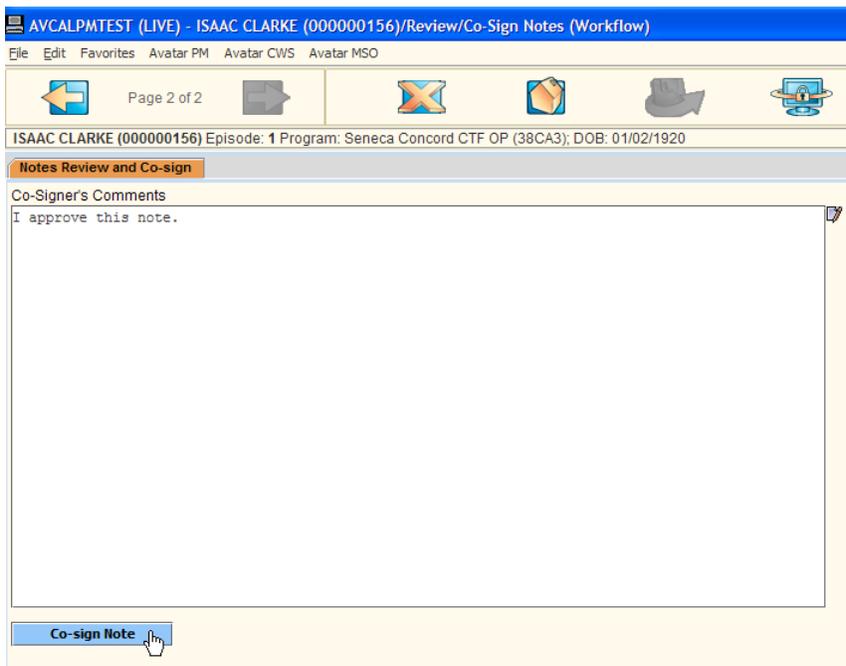
- ➔ Select your patient, if no patient already selected.

A screenshot of the 'Select Client' dialog box. The dialog has a blue header with the text 'Select Client'. Below the header, there is a text input field labeled 'Client Name/ID#' containing the value '156'. Below this field is a blue button labeled 'Select Client Name/ID# Search'. Further down, there is a dropdown menu labeled 'Select Client' with the selected value 'ISAAC CLARKE (000000156)'. At the bottom of the dialog is a blue button labeled 'OK'. A mouse cursor is visible over the dropdown menu.

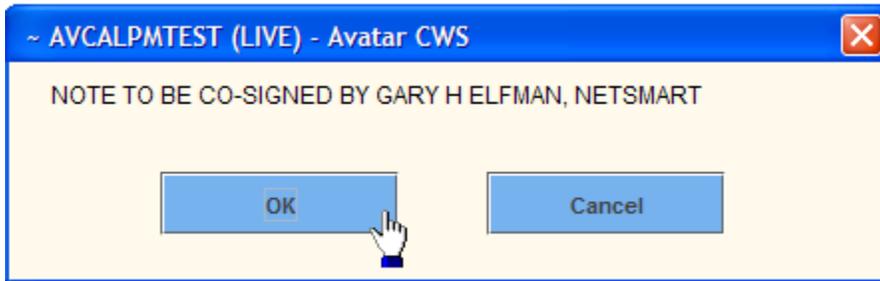
- From the Note Review and Co-Sign main window, select the Note Type you wish to Co-sign. Then select from the filtered List of Notes, the note that you wish to Co-sign. That note will then populate the 'Original and Appended Notes' field.



- Go to page 2. On page 2, write a comment, if applicable, and submit the form to co-sign the Progress Note.



➡ You will receive the following pop-up dialog box.



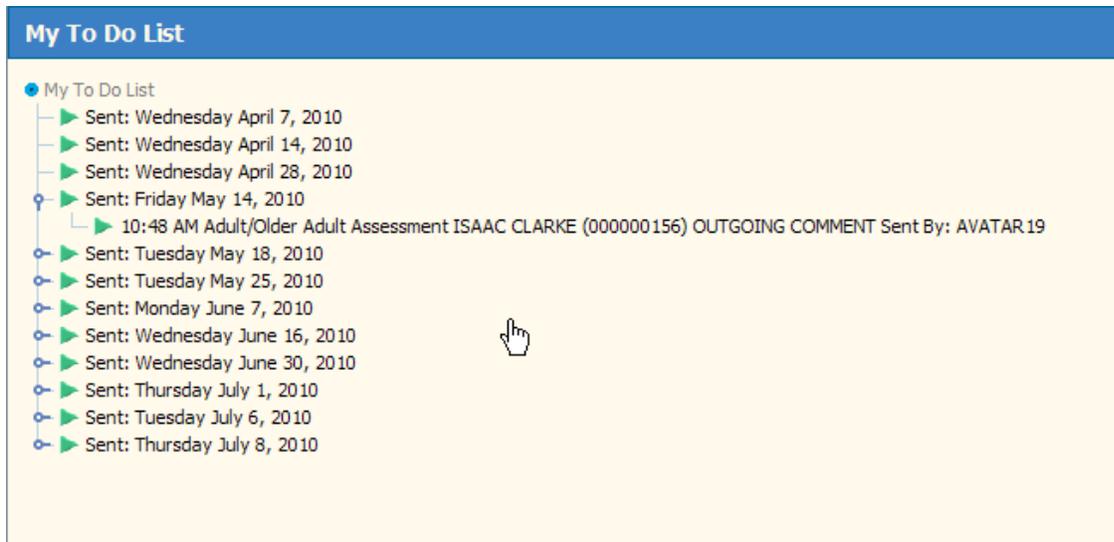
➡ You can go to the first page and co-sign more notes, or close the application by selecting the BIG X.



## Approve/Reject Assessments from To-Do list

➤ Access To-Do list

➤ Navigate to date in question and open To-Do tree by double-clicking on green arrow



The screenshot shows a web interface titled "My To Do List". It features a tree view of tasks. The root node is "My To Do List" with a blue circle icon. Below it are several task entries, each with a green arrow icon and a date. The tasks are:

- Sent: Wednesday April 7, 2010
- Sent: Wednesday April 14, 2010
- Sent: Wednesday April 28, 2010
- Sent: Friday May 14, 2010
  - 10:48 AM Adult/Older Adult Assessment ISAAC CLARKE (000000156) OUTGOING COMMENT Sent By: AVATAR19
- Sent: Tuesday May 18, 2010
- Sent: Tuesday May 25, 2010
- Sent: Monday June 7, 2010
- Sent: Wednesday June 16, 2010
- Sent: Wednesday June 30, 2010
- Sent: Thursday July 1, 2010
- Sent: Tuesday July 6, 2010
- Sent: Thursday July 8, 2010

A mouse cursor is pointing at the green arrow icon next to the task "Sent: Wednesday June 16, 2010".

➡ Right-click and 'Open' or Double-click on the To-Do item

The screenshot shows a web browser window with the title 'AVCALPMTTEST (LIVE) - ISAAC CLARKE (000000156)/Approve To Do Item'. The browser's menu bar includes 'File', 'Edit', 'Favorites', 'Avatar PM', 'Avatar CWS', and 'Avatar MSO'. Below the menu bar is a toolbar with navigation icons (back, forward, home, stop, refresh) and a 'Submit' button. The main content area is titled 'Approve To Do Item' and contains a 'To Do Information' section with the following text: 'Date Sent : 05/14/2010', 'Time Sent : 10:48 AM', 'Sent By : AVATAR19', and 'Option : Adult/Older Adult Assessment'. Below this is a text area labeled 'OUTGOING COMMENT'. At the bottom, there are radio buttons for 'Approve To Do Item' with 'Yes' selected and 'No' unselected, a 'View Detail' button, and a 'Comments' text box.

Label	Field Type	Required	Comments
To Do Information	Text Box	Display Only	This is the To Do items description and listing
Approve To Do Item	Radio Button	Yes	Approve-Yes or Approve-No the To Do item
View Detail	Command Button	No	Press this button to view the details of the assessment form that you are approving
Comments	Text Box	Yes	Complete the box with your comment re: the approval.
Submit button	Icon	Yes	Submit the form

# Approve/Reject Treatment Plans

➡ Access To-Do list

➡ Navigate to date in question and open To-Do tree by double-clicking on green arrow

**My To Do List**

- My To Do List
  - ▶ Sent: Wednesday April 7, 2010
  - ▶ Sent: Wednesday April 14, 2010
  - ▶ Sent: Wednesday April 28, 2010
  - ▶ Sent: Friday May 14, 2010
  - ▶ Sent: Tuesday May 18, 2010
  - ▶ Sent: Tuesday May 25, 2010
  - ▶ Sent: Monday June 7, 2010
  - ▶ Sent: Wednesday June 16, 2010
  - ▶ Sent: Wednesday June 30, 2010
  - ▶ Sent: Thursday July 1, 2010
  - ▶ Sent: Tuesday July 6, 2010
  - ▶ Sent: Thursday July 8, 2010
    - ▶ 09:44 AM CANS CYF Initial Assessment ISAAC CLARKE (000000156) THIS IS THE COMMENT FOR DRAFT Sent By: NETSMART GARY H ELFMAN in Draft status
    - ▶ 10:25 AM Client Treatment Plan ISAAC CLARKE (000000156) Client Treatment Plan '1ST FOLLOW UP' For Reviewing Sent By: NETSMART GARY H ELFMAN
    - ▶ 11:05 AM Client Treatment Plan ISAAC CLARKE (000000156) Draft Client Treatment Plan 'NEW TEST FOR WORKFLOW' For Reviewing Sent By: NETSMART GARY H ELFMAN

➡ Right-click and 'Open' or Double-click To Do item to open the To Do item

**AVCALPMTTEST (LIVE) - ISAAC CLARKE (000000156)/Approve To Do Item**

File Edit Favorites Avatar PM Avatar CWS Avatar MSO

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Submit

**Approve To Do Item**

**To Do Information**

Date Sent : 07/08/2010  
Time Sent : 10:25 AM  
Sent By : NETSMART GARY H ELFMAN  
Option : Client Treatment Plan

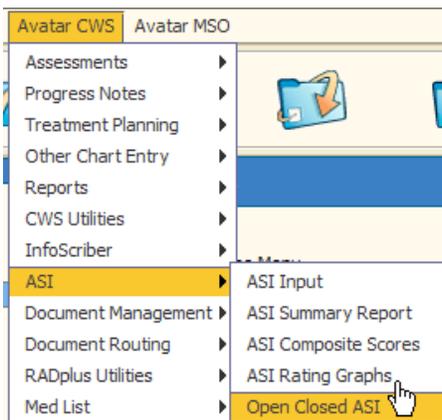
Client Treatment Plan '1ST FOLLOW UP' For Reviewing

Approve To Do Item  
 Yes  No [View Detail](#)

Comments

# Open Closed ASI

➔ Open the form from the main menu or from your favorites or from search



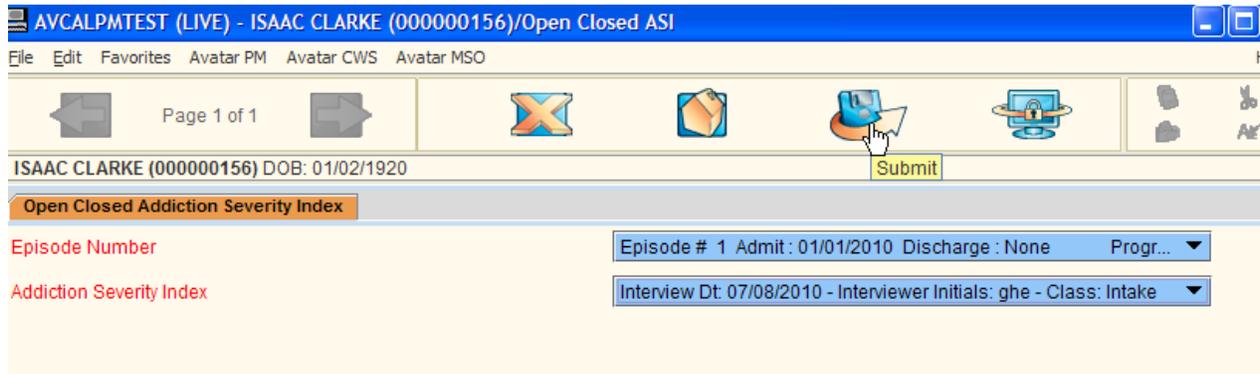
➔ Select the client if not already selected

A screenshot of a 'Select Client' dialog box. The dialog has a blue header bar with the text 'Select Client'. Below the header, there is a text input field labeled 'Client Name/ID#' containing the text 'CLARKE'. Below the input field is a blue button labeled 'Select Client Name/ID# Search'. Below the search button is a dropdown menu labeled 'Select Client' with the selected item 'ISAAC CLARKE (000000156) [Unique Client ID: CLARKE.ISAAC~156]'. At the bottom of the dialog is an 'OK' button. A mouse cursor is visible near the bottom right of the dialog.

➡ Select the Episode Number and the closed Addiction Severity Index.

➡ You will get an error message if there is no closed ASI.

➡ Submit



AVCALPMTTEST (LIVE) - ISAAC CLARKE (000000156)/Open Closed ASI

File Edit Favorites Avatar PM Avatar CWS Avatar MSO

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ISAAC CLARKE (000000156) DOB: 01/02/1920

Submit

Open Closed Addiction Severity Index

Episode Number Episode # 1 Admit : 01/01/2010 Discharge : None Progr... ▼

Addiction Severity Index Interview Dt: 07/08/2010 - Interviewer Initials: ghe - Class: Intake ▼

## Delete/Re-Assign To Do Items

**Purpose:** To Re-Assign a To Do item from one user To Do list to another user To Do list.

- ➔ Access 'Delete/Re-Assign To Do Item' from the menu, by searching, or from your favorites.

Label	Field Type	Required	Comments
Delete/Re-Assign	Single Select	Yes	Select whether this is a delete To Do item or a Re-Assign To Do item
Select User	Process Search	Yes	Search for the original user or currently has the To Do item
Select Target User	Process Search	Yes (if Re-Assign is selected)	Search for the user who will receive the To Do item

<b>Label</b>	<b>Field Type</b>	<b>Required</b>	<b>Comments</b>
To-Dos	Multiple Select box	Yes	After selecting the original user, all of those To Do items will appear in this box available for select. Select any of the To Do items you wish to Re-Assign.
Change Sending User ID to	Search	NO	No need to use.
Submit	Icon	Yes	Submit/Save the record and Re-Assign the To Do items to new Target User.