Avatar NX Intro Training Guide

Sacramento County Avatar Training and Support

Purpose of this Training Guide:

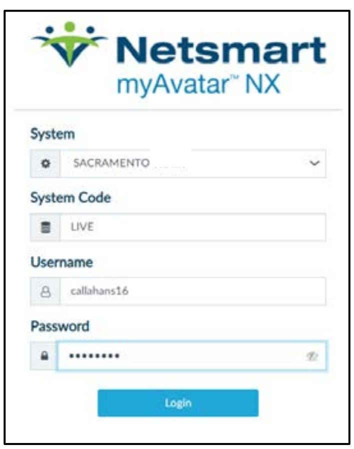
This Training Guide is designed to give additional support in navigating Avatar NX after attending Avatar NX training. The Training Guide may change as Avatar NX trainings are updated. If you have any additional questions please contact Avatar Support at 916-876-5806 or Avatar@Saccounty.net.

What is Avatar NX:

Avatar NX is an Electronic Health Record System (EHR) used to bill Medi-Cal and other guarantors, document client services, assessments, and client data submitted to the state. Clients must be admitted into your program before entering data into Avatar NX.

Logging Into Avatar NX:

Go to the Avatar NX URL, https://sacramentonx.netsmartcloud.com/#/home, using any web browser, except for Internet Explorer. If you will be launching Order Connect from Avatar NX make sure to use Microsoft Edge.



- Login information is case sensitive. The system code will be in all caps and username all lowercase.
- The system code allows users to see client information within their agency.
- The username is specific to each individual user. Each account is setup based on the user's classification and role at their agency. Permissions are based on classification and trainings attended.
- Passwords should not be shared with anyone, and other users cannot use your Avatar NX account. Sharing this information or allowing others to work in your account is a HIPAA violation and will be reported.

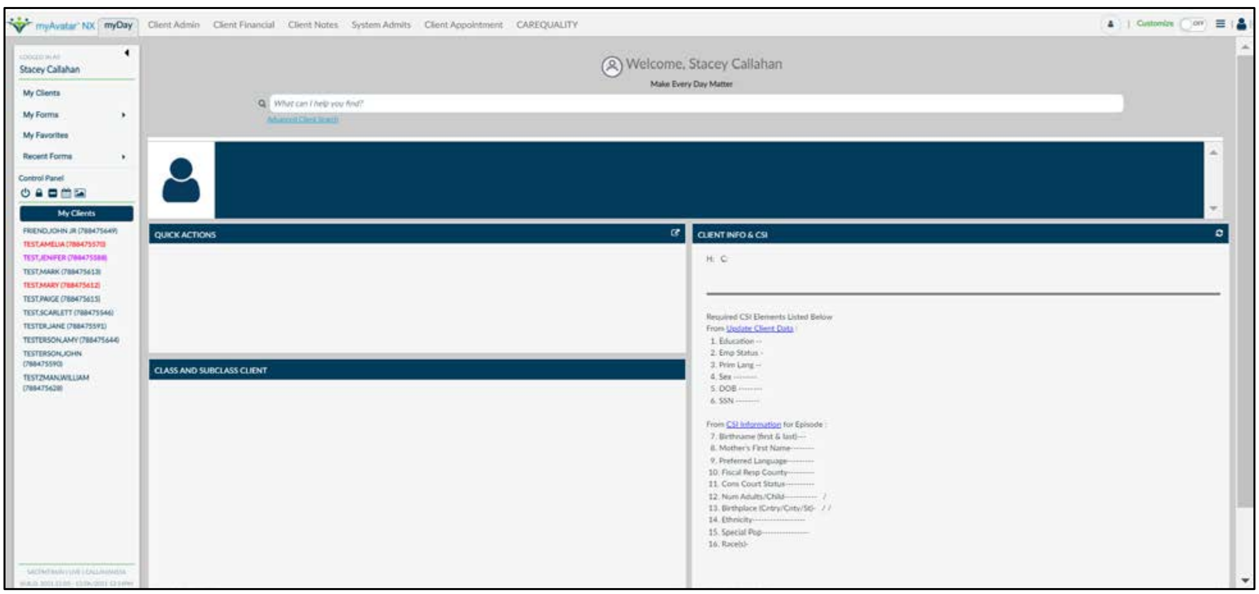
To ensure security, there are a number of rules that apply to the password format used in Avatar NX.

Password Rules:

- Passwords must be between six to nine characters in length
- Passwords must contain as least one number
- Passwords must contain at least one uppercase letter
- Passwords must contain at least one lowercase letter
- Passwords must be reset every 180 days
- Passwords cannot be reused within 180 days
- Passwords cannot be your user ID

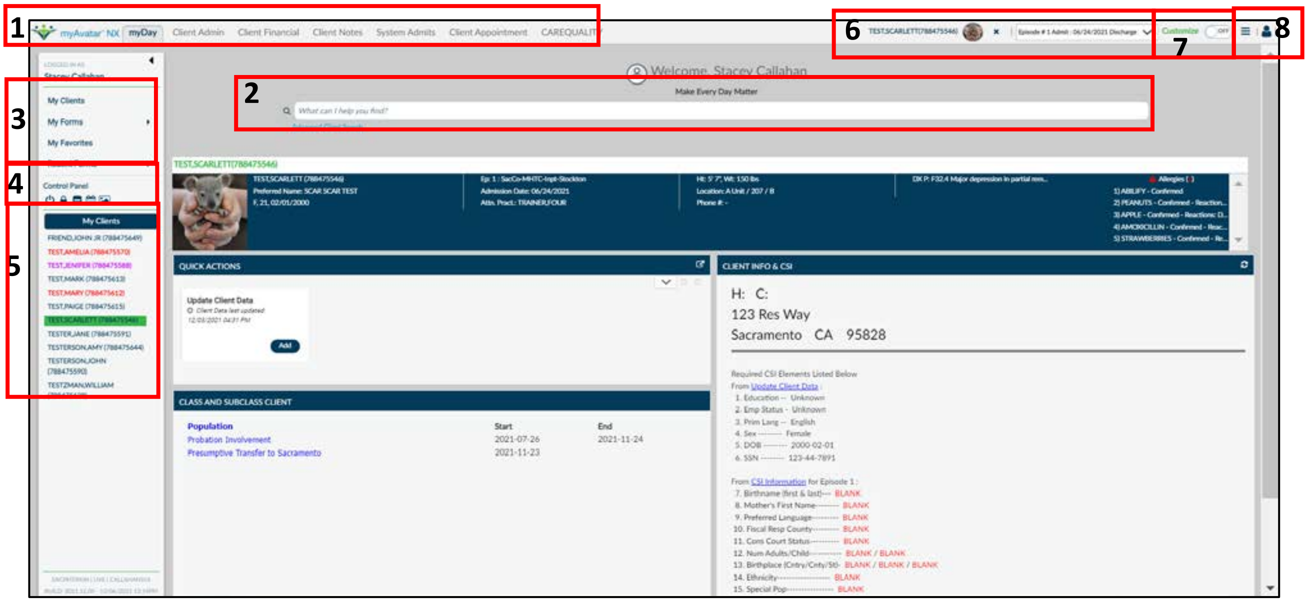
myDay Overview:

The "myDay" console is what you will first see when you log into Avatar NX. The widgets will be blank until you highlight a client. Once a client has been selected, the widgets will populate with that client's information.



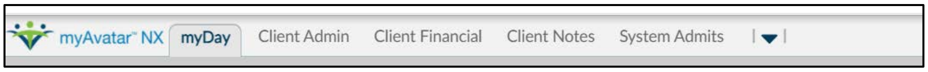
Above is a screenshot of what your Avatar NX will look like once you log in. Notice none of the widgets are showing data, because there is no client selected.

In the screenshot below, a client has been selected. Notice how the widgets now populate with that client's information.



1. **Consoles:** At the top of the screen are various consoles that show widgets based on the view you are in. For example, a "Client Admin" console will show widgets with administrative data, such as demographics, movement history, etc. Whereas a "Client Notes" console will show widgets with Progress Note data.
2. **What can I help you find?:** This bar is a smart search that will look up clients, forms, and staff members. Type in key word(s) into the search and it will pull all results. The more data you type the more narrow the search.
3. **My Forms/Favorites/ Recent Forms:** My Forms will drop down a list of searchable forms and reports based on category. Favorites will drop down any forms you have saved to your favorites. Recent Forms will drop down any forms you have opened during your session in Avatar.
4. **Control Panel:** The Control Panel gives quick links to log out of Avatar, lock your screen, close all open forms (without saving your work), or launch the Scheduling Calendar or Document Capture. A separate training is required in order to access the Scheduling Calendar and Document Capture.
5. **My Clients:** Clinical staff will see a list of any clients that have been assigned to them. Clients can be assigned by admin staff at your agency by adding you as the Admitting or Attending practitioner.
6. **Episode Drop-Down:** If a client is selected, their name will show at the top of your Avatar screen. The episode drop-down will show next to the name and will default to the most current episode. If there are multiple programs at your site, make sure the most current episode for your program shows on this drop-down.
7. **Customize:** You are able to customize your Avatar homescreen. Click the On/Off button to turn on customization. Once complete, click on it again to lock in the changes.
8. **Menu:** The icon on the far right is your menu button. You can log out of the system, access preferences, refresh forms, and access help pages through the menu.

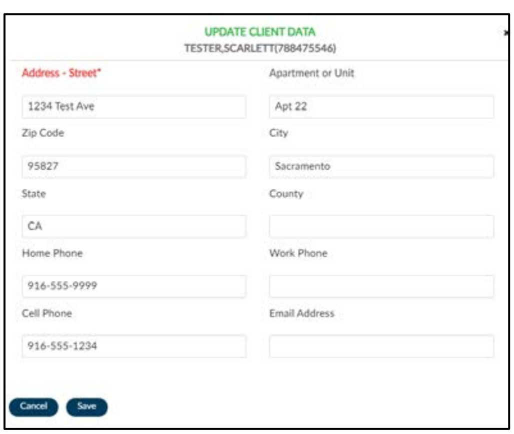
Consoles



- The widgets in each console will be specific to the category that you choose. These categories are based on your view. Clinical consoles and Admin consoles will not look the same. If you have attended both clinical training and admin training, you may need to let the Avatar Team know which view you prefer to have.
- The arrow button next to the consoles will show any additional consoles you have access to but do not fit on the console bar.
- The widgets on the consoles will show data for the client you have selected. This is view only information, data is only entered through a form in Avatar. Some widgets may have hyperlinks which will open the form.
- The widgets on your screen can be customized. However, you are only able to add widgets you have access to, based on your role.

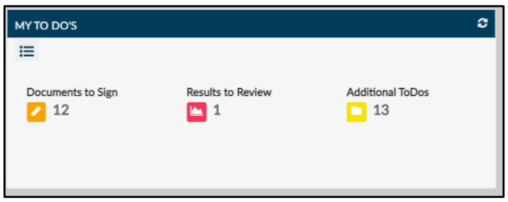
Quick Actions Widget

- The "Quick Actions" widget will show on the myDay console, it will become enabled once you select a client.
- The widget will allow you to view the client's demographics quickly and make any updates to their basic demographics as well.
- Click on the Add button to open a small version of the "Update Client Data" form. This will allow you to view or change demographic information for your client without having to go to the "Update Client Data" form. This will not list all off the information in the form but the most common things you may need to view or update for your client.

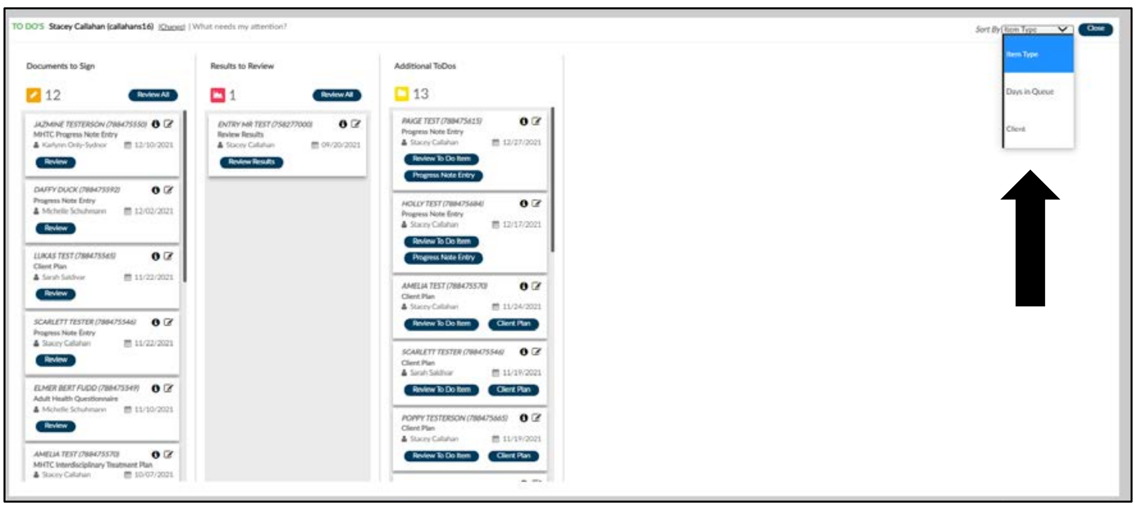


My To Do's

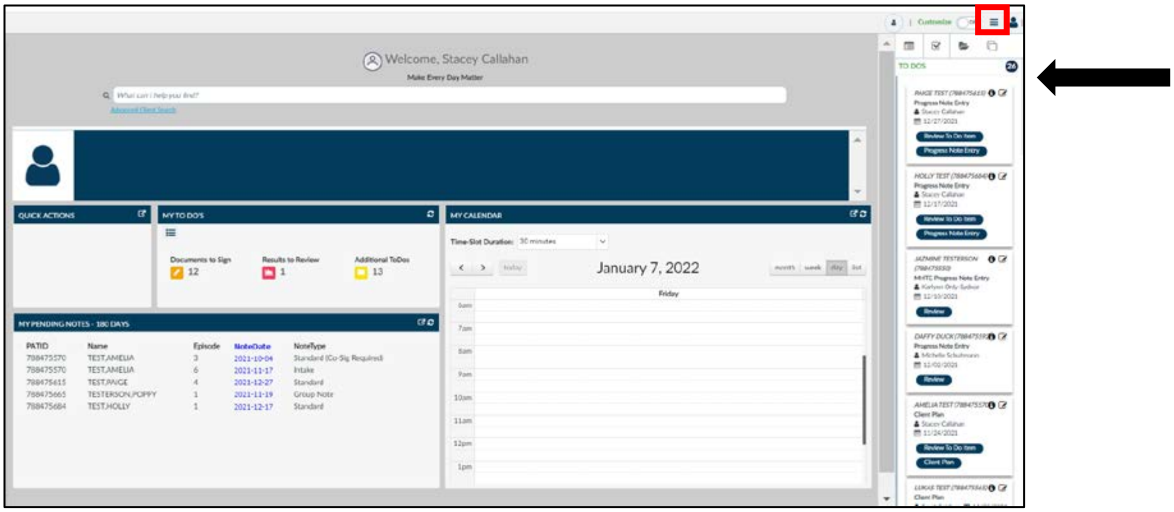
- The To Do's widget will show clinical staff any items they have that need to be addressed. It will be broken into three categories, Items to Sign, Results to Review, and Additional ToDos.



Click anywhere in the widget to open the To Do's page.

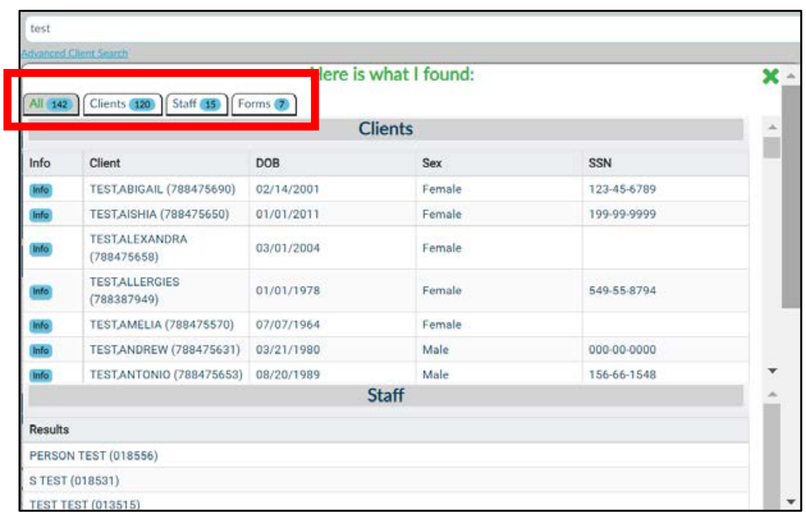


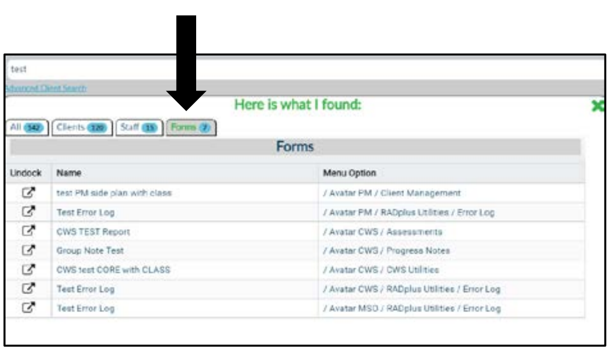
- To-Do items will default to be broken out by those three sections. You are able to change the way you see To-Do items by changing the selection in the "Sort By" dropdown.
- To review an item click "Review". This is primarily used for supervisors who co-sign items. To return to a draft item click the name of the form (Progress Note Entry, Client Plan, SUD Assessment, etc.).
- To-Do's can also be accessed by clicking on the "My Activity" button on your home screen.



What Can I Help You Find?

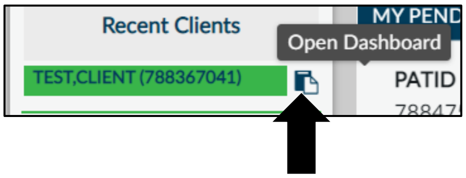
- The "What Can I Help You Find?" bar is your main search in Avatar NX. You can use this to search for forms, reports, clients, and staff. Type in key word(s), the more you type the more narrow your search will be.
- The search results will be broken down by Clients, Staff, Forms, and All. The search will default to All, you can click on the tab to view the category you are looking for.

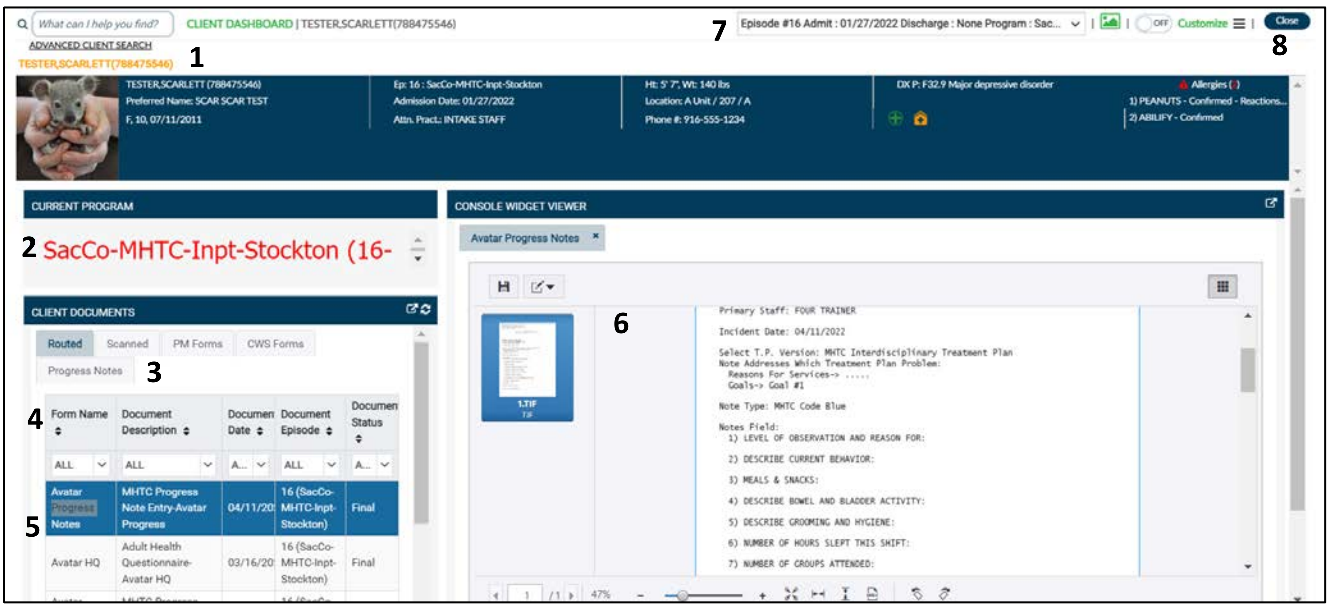




Client Dashboard

- The Client Dashboard will show documentation for the specific client. This will include, routed documents, scanned documents, PM forms (admin documents), CWS forms (assessments), and Progress Notes.
    - To pull up the Client Dashboard you will select your client, either from your My Clients list or by searching them. If you are searching them, double click on their name and drop them into your Recent Clients list.
    - Hover over the clients name and click on the “Open Dashboard” button.





1. **Client Header:** The client header will be at the top of the Client Dashboard. This will show basic demographic information, Clinical Pathways (if applicable), and episode information.
2. **Current Program:** The current program will show you the clients most current open episode. Make sure to confirm this is the program you should be documenting into. If it is the wrong program you can change the episode using the episode drop-down (see #7).
3. **Document Type:** Select the type of document you would like to view (scanned, progress note, assessment, billing).
4. **Filters:** Filters can be used to narrow down your search. For example, if you are looking for a Client Plan you can use the filters to only show Client Plans.
5. **Document Description:** Use the form description, date, entry person, and workflow status to find the document you want to view.

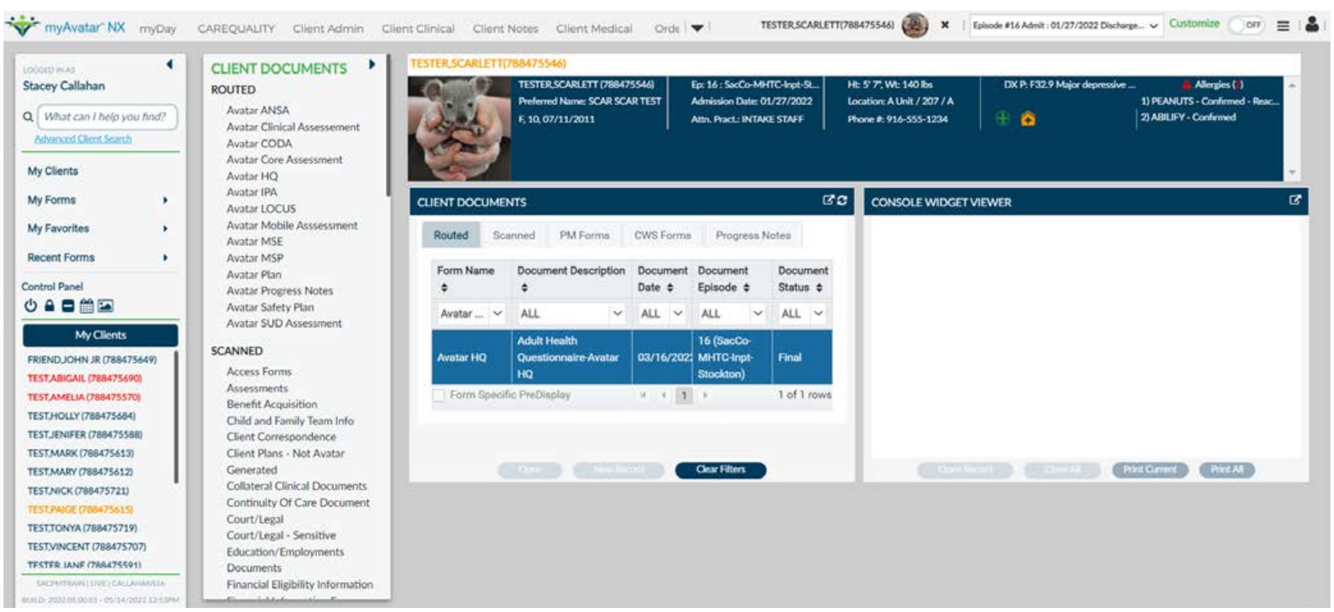
6. **Console Widget Viewer:** When you click on a Form Description, the item will show on the Console Widget Viewer. You are able to view the data that was entered for that item. You are also able to open the form or print the data by scrolling to the bottom of the page.

7. **Episode Selection**: Always check this drop-down to make sure you are viewing documentation in the correct episode.
8. **Close**: Click on the "Close" button to close the dashboard and go back to the "myDay" view.

If you would like to view the Document Descriptions in a larger window, you will need to undock both the Document Description widget and the Console Widget viewer. Double click on the item you want to view in the description and it will show in the viewer. To undock the widgets click on the icon below.

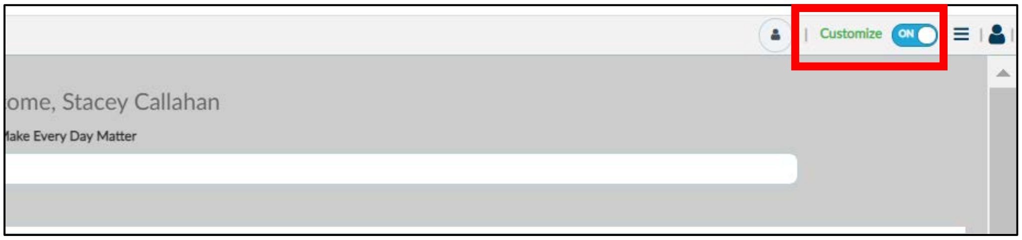
Client Chart Console

The client chart console works the same way as the Client Dashboard. The difference is the layout of the categories. In the Client Chart Console, you will see both the Client Document and the Console Widget Viewer widgets but there will be an additional section where you can sort through what particular category you want to view. This works in lieu of using the filters. Unlike the Client Dashboard this will not show the program you are working in. You will want to make sure you check the episode drop-down to ensure you are working in the correct episode.

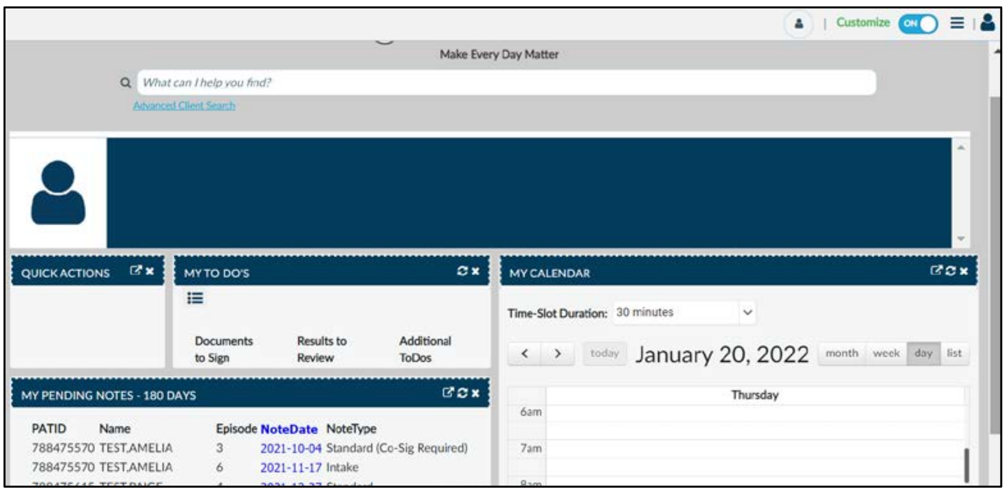


Customizing your Homescreen

1. Click on the On/Off button next to “Customize” at the top of the screen. It should be set to “On” in order to customize.

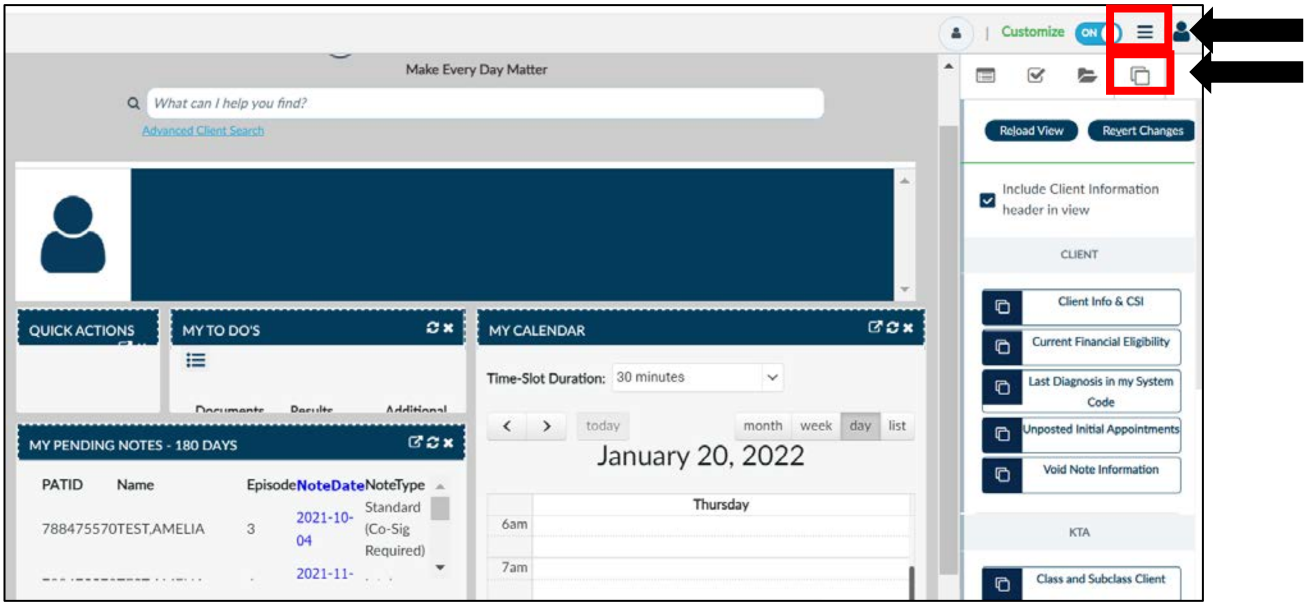


2. When the Customize button is on the widgets on your screen will have a dotted outline around them. As well as an X on the upper right of the widget.

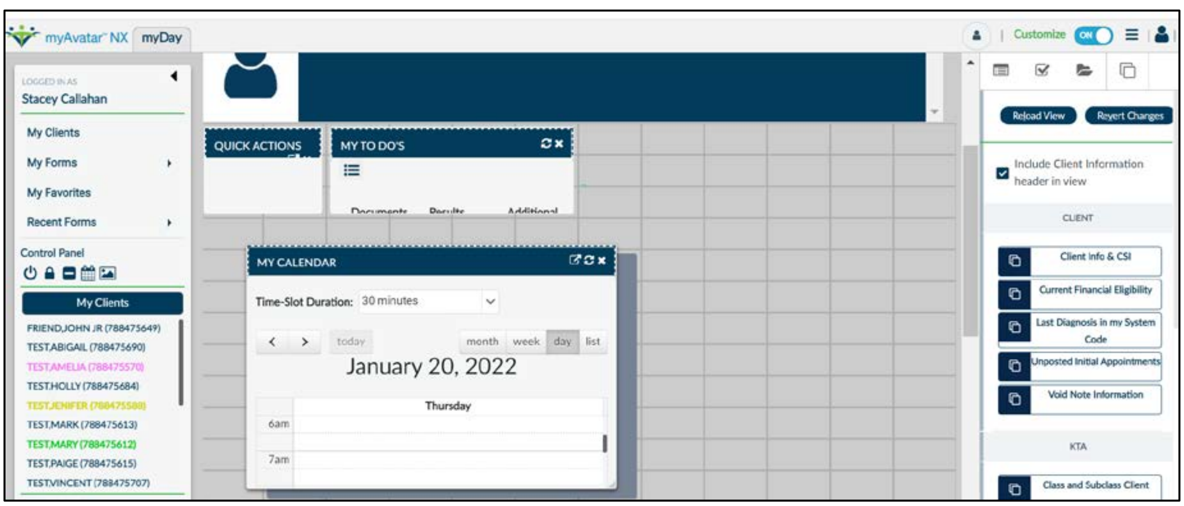


3. To remove a widget click on the X on the widget.

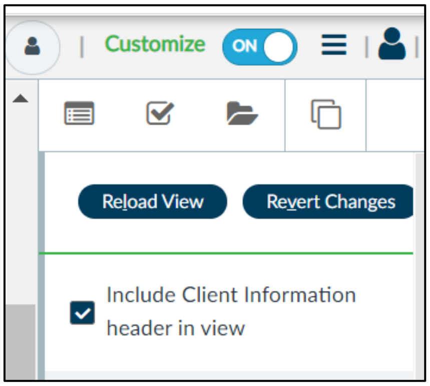
4. To add widgets, click on the “My Activity” button and below that click on the “View/Add Widgets” button. You will see a list of possible widgets to add.



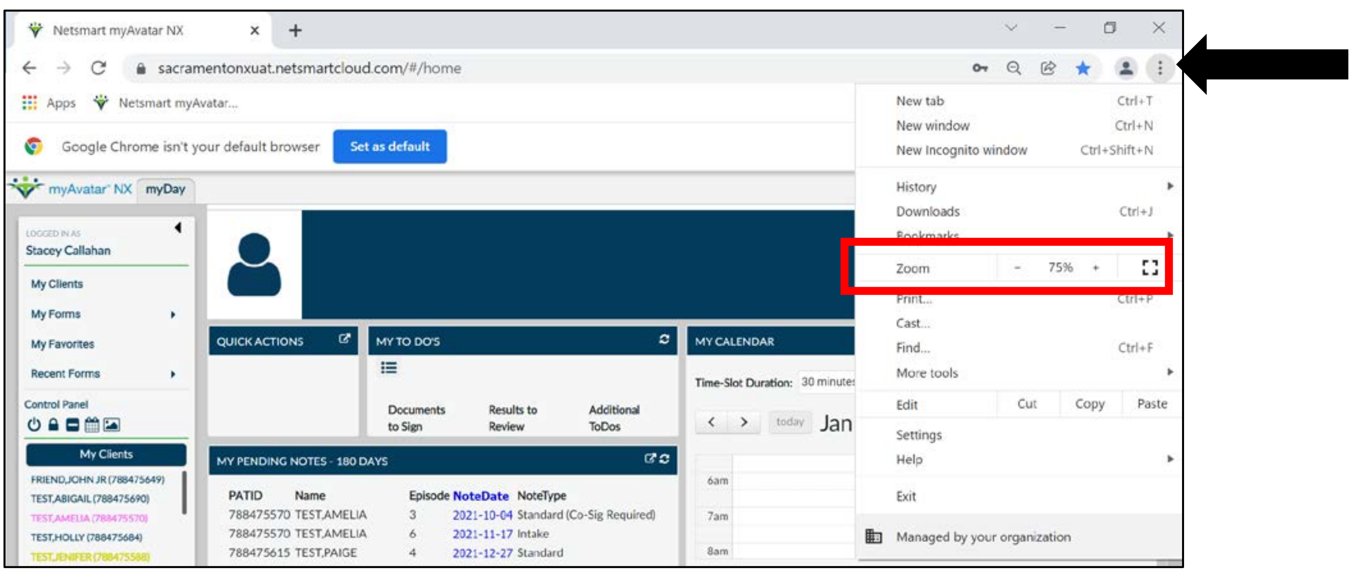
5. To add the widget, use your mouse to drag and drop the widget onto your homescreen. Use your mouse to arrange widgets in the space you want them. You can also use your mouse to resize the widgets.



6. To save changes, move the Customize button from “On” to “Off”. If you would like to discard the changes click on the “Revert Changes” button. If you would like to go back to the default home view, click the “Reload View” button.



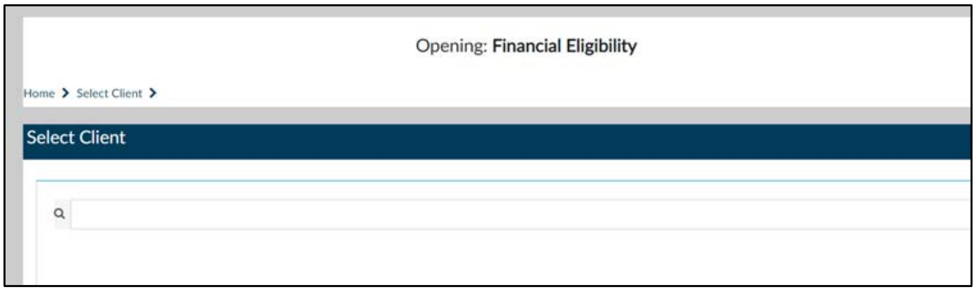
7. Since Avatar NX is browser based you are able to customize the size of your Avatar screen. Click at the top of your web browser and use the zoom feature to make the screen larger or smaller. The location of the zoom feature may vary based on the web browser you are using, however it will most likely be at the top right of the webpage. The customize button does not need to be on to change the size of your Avatar NX screen, however since you are changing the size of your web browser, this will affect how other websites may look. You can adjust that size at any time.



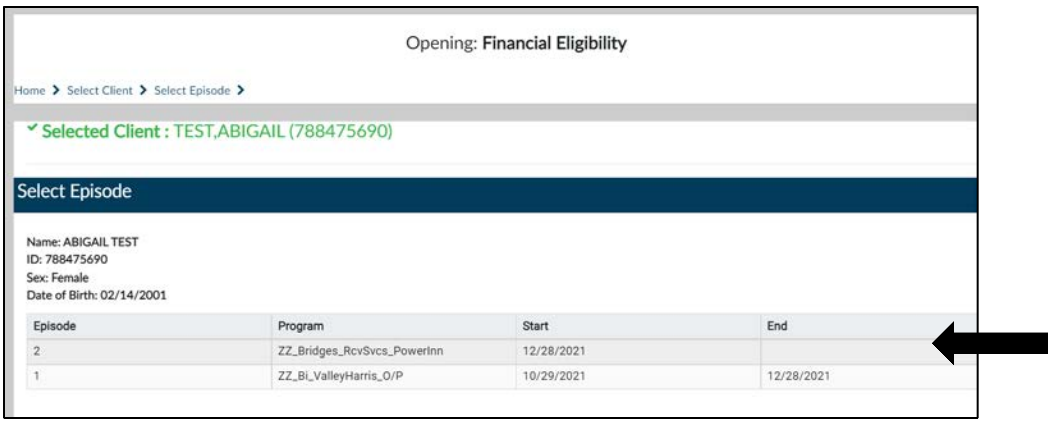
Forms & Reports

Forms are used to enter in data for a client. Data is entered into a client’s chart by completing a form. Once the form is submitted that data can be viewed in the Client Dashboard or through a Report. Most forms in Avatar NX have a corresponding Report.

To open a form search the form name in your search box. For most forms, you will need to choose a client to open the form for. You can highlight a client from your My Client list prior to opening the form or type in their name or Avatar NX ID after opening the form.



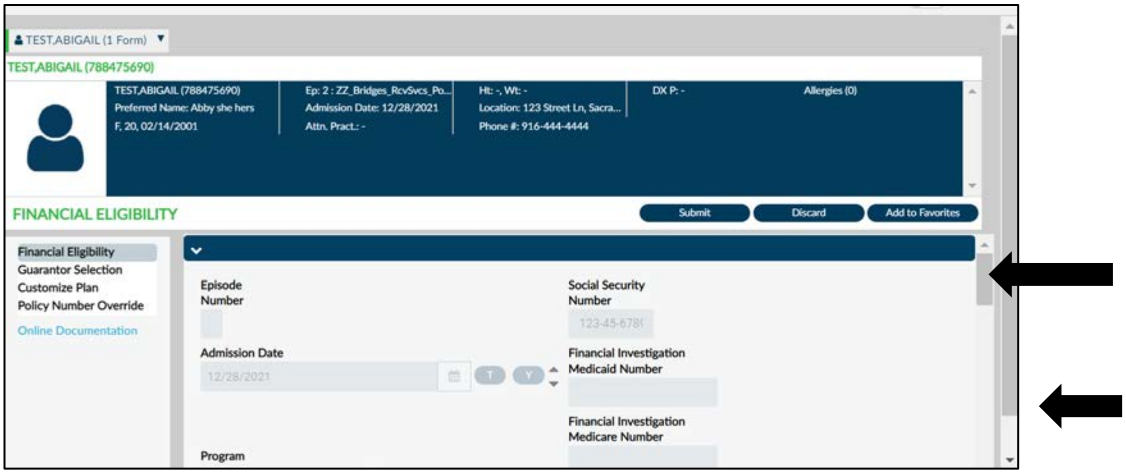
You will be brought to a pre-display. Select the episode you want to enter the form into. Double click to open.



If there are additional pages to a form they will show on the navigation bar on the left-hand side.

Fields may be grayed out (as seen above) if the field is not applicable or if the information is locked in. If the information is locked in it is pulling the data from another form (such as Admission or Update Client Data).

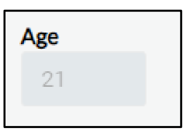
Make sure to use the scroll bar on the right to view all fields on the form. Depending on the size settings you have set, you may not be able to see all data on the screen at once. There may be two scroll bars depending on your sizing settings. Make sure to scroll through both to ensure all fields applicable have been addressed.



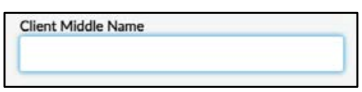
There are several types of fields you may see in a form.

Red and Required *: If a field is marked red it is a required field and must be completed before submitting. There will also be an asterisk next to required fields if you are unable to see the color red.

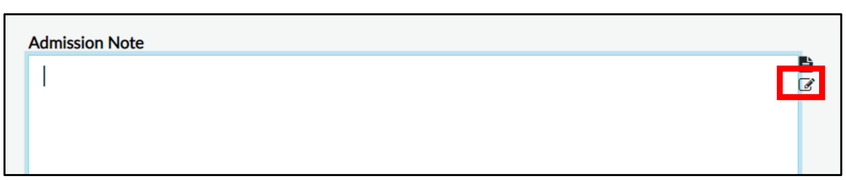
Greyed out Fields: If a field is greyed out that means the data has pulled in from a separate source and is not editable, or based on a previous selection the field is not applicable, therefore not editable. Based on selections you make, some fields may become red and required, while others may grey out.



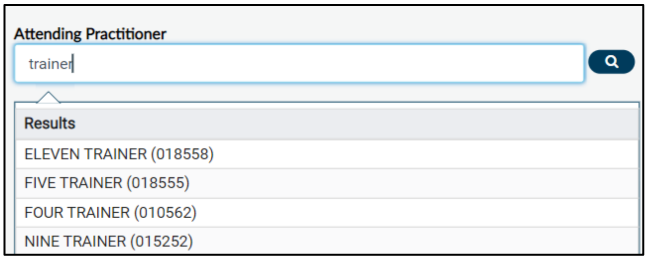
Text Box: A text box is a free text where you can type in your answer.



Large Text Box: A large text box is also a free text field, however you have the ability to pop it out of the screen and enlarge it. Anytime you see the icon below on a text field you are able to enlarge that field. Click on the Save button and the data entered will pull forward into the text field.



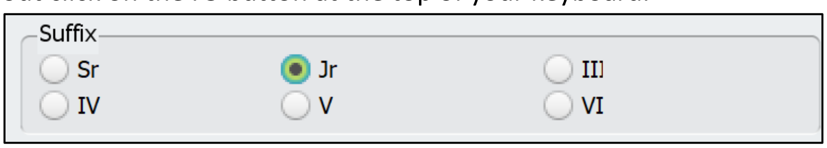
Look-Up Box: When you see the Search icon on the upper-right of a text box that means it is a Search field. This is typically used to search names and diagnosis. Type in what you are searching for and then click on the search icon. In some fields a search box will appear below while you are typing, showing results that match your search.



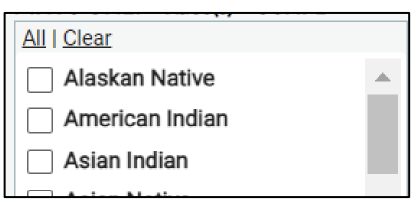
Date Fields: Users can manually type in the date, use the calendar icon to look up a date, or use the T button for today or Y for yesterday. The arrow buttons can also be used to move up and down days.

Time Fields: Users can use military time, or can manually enter in the time as long it is entered in the correct format (00:00 AM/PM). The Current button will pull in the current time, and the Hours, Minutes, and AM/PM buttons will move the time up and down.

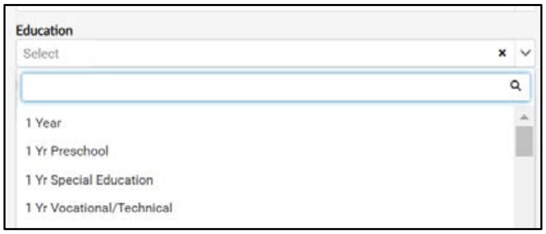
Radio Buttons: You can only make one selection in this field. If you make a selection and need to clear it out click on the F5 button at the top of your keyboard.



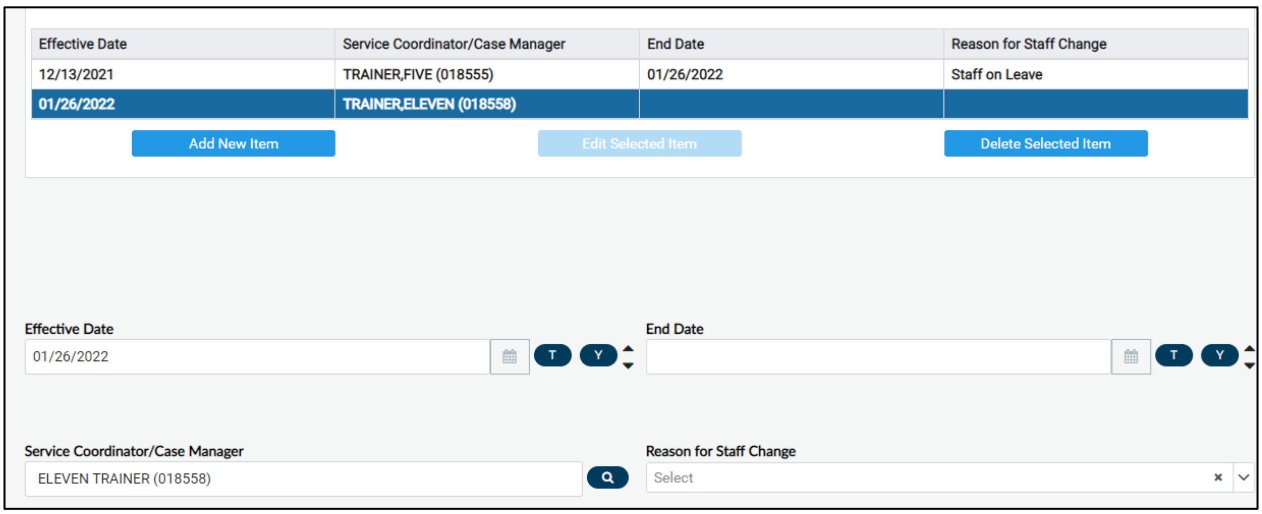
Multi-Select: Allows users to make more than one selection by selecting all options that apply. You are able to deselect by clicking on the box again.



Drop-Downs: You can only make one selection in this field. If you make a selection and need to clear it out click on the F5 button at the top of your keyboard.



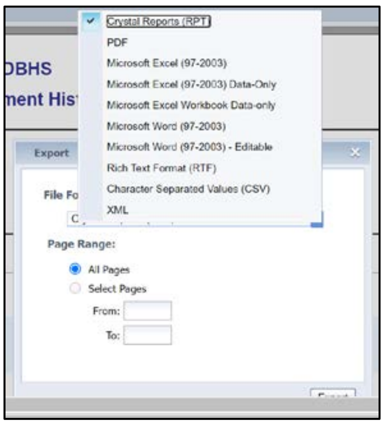
Multi-Iteration Table: The data entered in the fields listed below the multi-iteration table will populate into the table. In order to fill in the fields below the table a new item must be added. To begin, click the "Add New Item" button below or to the side of the table. A blank line will appear, once the blank line appears you are able to fill out the fields below. When you enter the information below, the data will populate into the table. You can also delete or edit information that is entered incorrectly or in error. Multiple entries can be added by clicking "Add New Item".



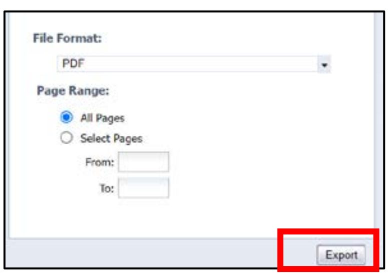
Submit/Discard: Once you have completed a form you will save it by clicking the "Submit" button at the top of the form. If you do not want to save your changes click "Discard". A form can also be added to your favorites from here by clicking the "Add to Favorites" button.

Reports: Reports can be searched in the same way as searching for forms. They can also be saved in your favorites or you can search using the "What can I help you find" bar. A report allows you to see data that was entered into a form. Some reports may require you to enter criteria that will narrow down your search results. Instead of submitting a report you will click "Process". The report will open in a separate web browser. Some reports may take longer than others to process. If you are processing too many reports at once you may get an error message. If a report is open for too long it may time out and you will not see the data. You are able to export a report once processed if you would like to continue viewing it.

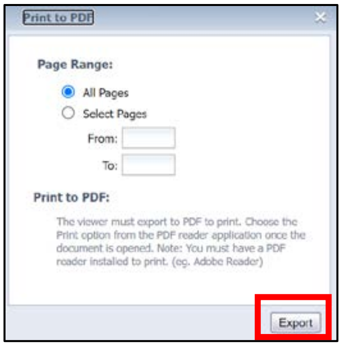
Select the file format you would like to export the report from the drop down.



Click the “Export” button. The report will save in a separate window in the document type that you saved it.

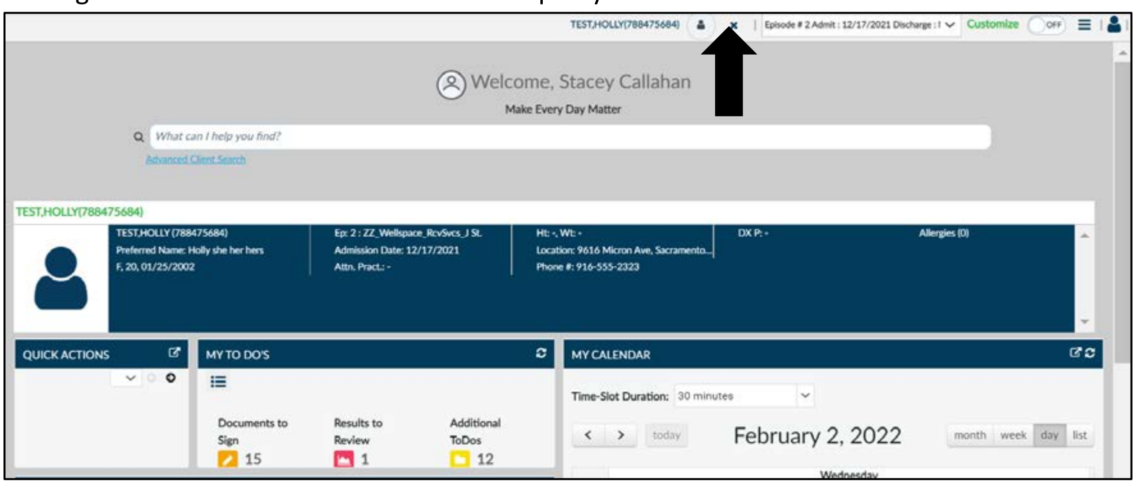


Reports can also be printed by clicking on the print icon. They will default to your computers default printer. You will receive a prompt telling you to print to PDF. You will need to export the report in order to print. Click the “Export” button.

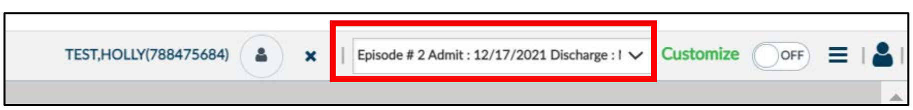


Helpful Hints When Using Avatar NX:

- Since the system is web based, do not click on the back button or refresh button at the top of your web browser. This will bring you back to the log-in screen and may cause you to lose work.
- Once you open a form for a client that client will become activated. That means any time you open any other forms or reports it will default to that client. You can clear the selected client by clicking on the "Clear Client" button at the top of your scree



- If you have a client selected make sure the correct episode is selected from the drop-down.



- Make sure you are using secure Wi-Fi and have a strong internet connection.
- If you will be launching Order Connect from Avatar NX make sure to use Microsoft Edge.

Contact Information:

Avatar Support- Offers support in navigating the system, password resets, and general Avatar questions.

Avatar@saccounty.net or 916-876-5806 available Monday- Friday 8am-5pm except for county holidays.

Billing Support- Offers support on billing related items, working denials, services that are unbilled.

Avatar-Fiscal@saccounty.net available Monday- Friday 8am-5pm except for county holidays.

QM Support- Offers support on documentation, timeliness, and state requirements. Monthly documentation trainings available.

QMInformation@saccounty.net available Monday- Friday 8am-5pm except for county holidays.

Drop-in Sessions- The Avatar Team is available to work with you individually regarding any additional Avatar Support you may need in regards to client billing or clinical forms in Avatar. Scheduled one-on-one virtual appointments via Skype for Business will be offered on designated days of the month. Please refer to Avatar Training Schedule for available dates. Please reserve your appointments ahead of time as slots are limited.

For Billing support please email avatar-fiscal@saccounty.gov

For Clinical support please email avatartrainingregistration@saccounty.gov