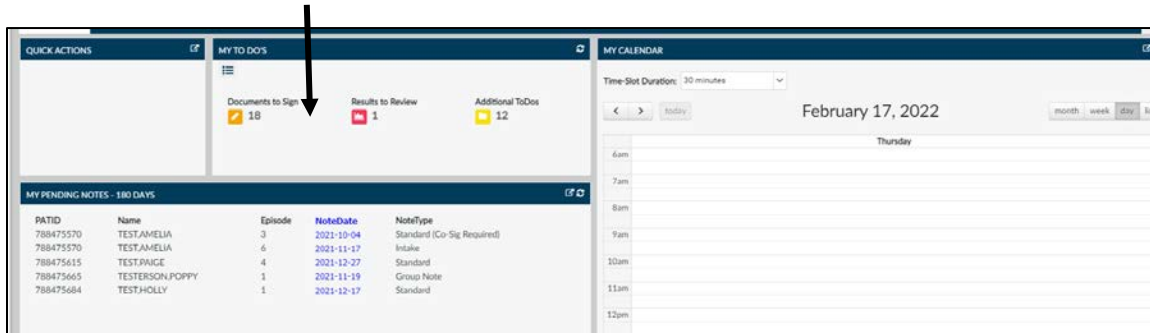


## Approvers Tip Sheet

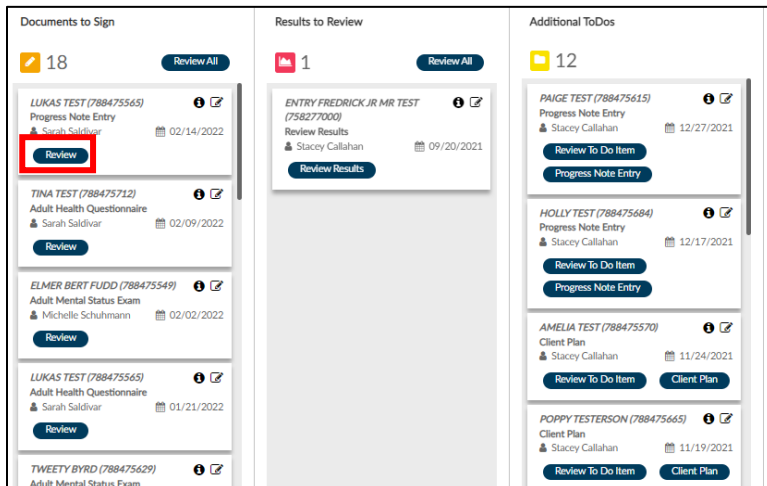
For supervisors who approve Plans, Assessments, and Progress Notes

This Tip Sheet may change as our trainings and systems are updated. Please visit our website <https://dhs.saccounty.gov/BHS/Avatar/Pages/Avatar.aspx> for the most updated version. If any additional help is needed you can contact us at [Avatar@saccounty.net](mailto:Avatar@saccounty.net).

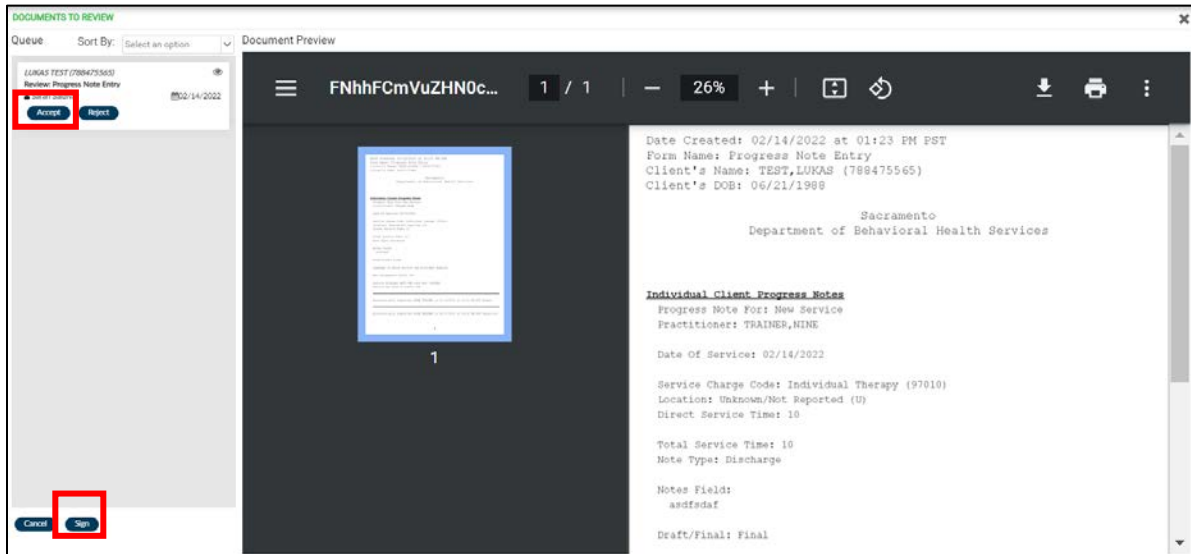
1. Click inside the white area of the My To Do's Widget to open.



2. The column on the left will show documents that need to be approved. You can review and approve each at a time by clicking the Review button on the document.



3. A window with the document will pop-up, you can review the document through this window. You can either “Accept” or “Reject”. If you accept, click “Accept” then “Sign”.



4. When you click “Sign” it will ask you for your password. Your password will be the same password you use when logging into Avatar.

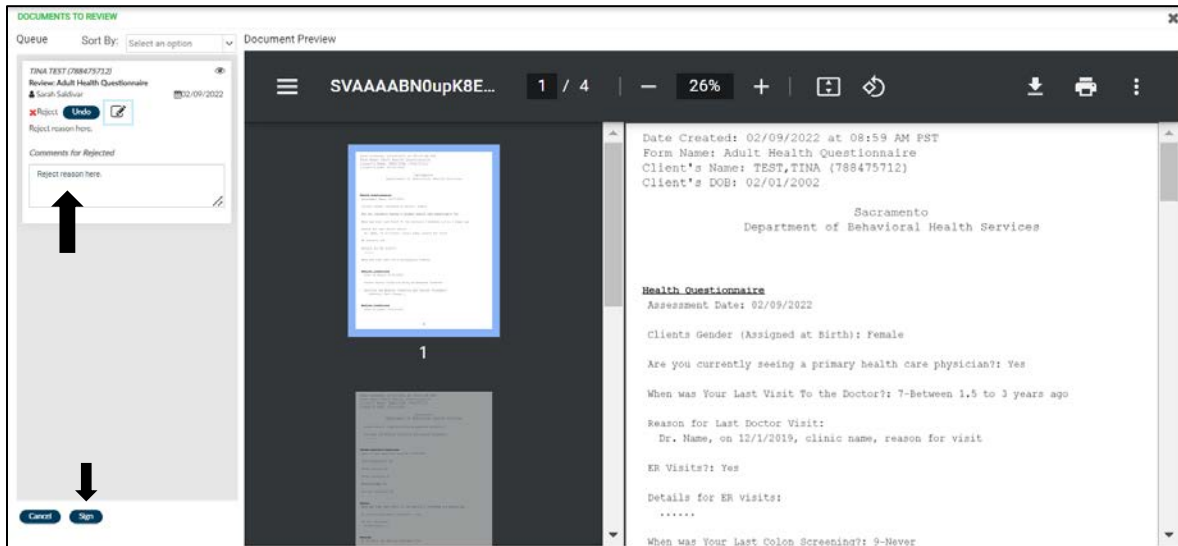
Verify Password

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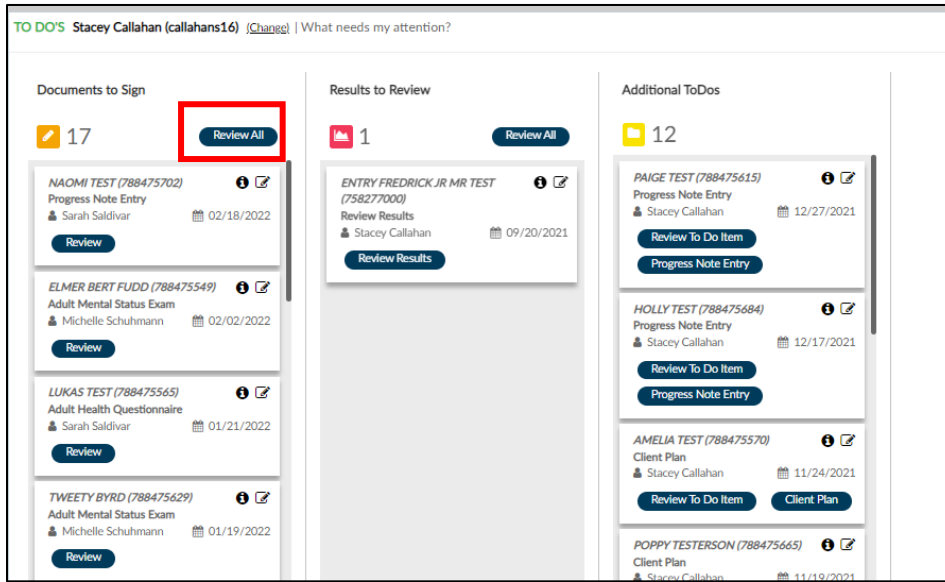
Password

Enter Password

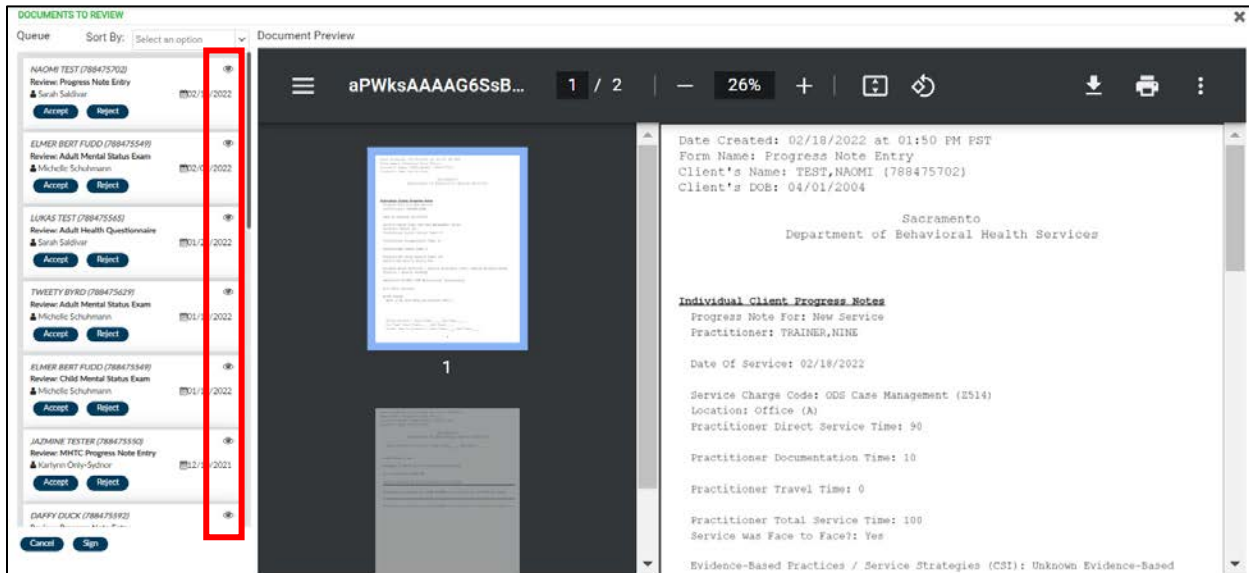
5. If you reject the document click “Reject”. That will open a comment box for you to enter notes to the clinician. Click “Sign” once done.



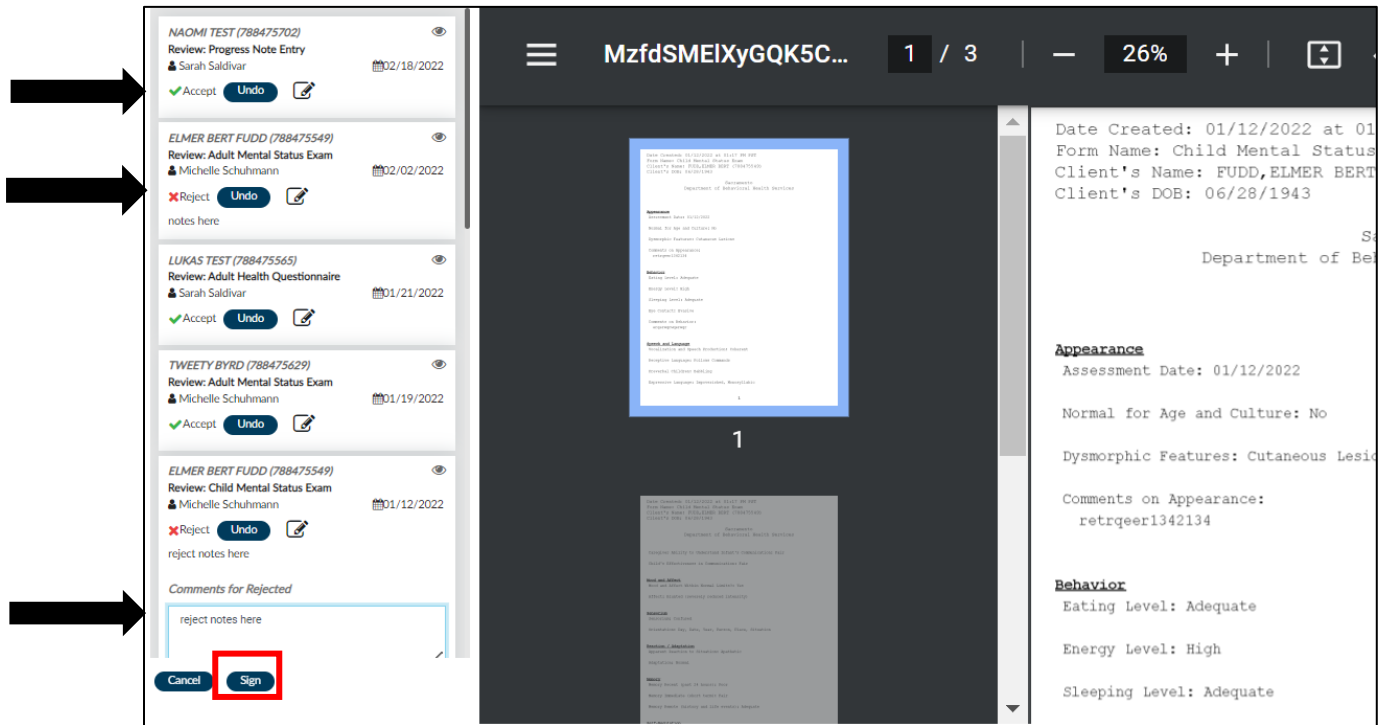
1. You are able to review multiple documents at once by clicking on “Review All”.



2. This will open a separate window with all documents listed on the side. A review box will appear for the document at the top of the list. You can change the sort to sort by date, client name, or staff name. To view a specific document click on the “Document Preview” button.



- You can go through each of the documents and either “Accept” or “Reject”. When a document has been accepted you will see a green check mark next to it. If it has been rejected you will see a red x. When rejecting a document you still have the option to write in comments. Once you are done you can click “Sign” at the bottom and sign all documents at once.



Users may add multiple approvers for a document. The document will not be finalized until each approver has accepted it. If one person rejects the document or does not accept it, the document will not be finalized.