

Clinical Document Viewer Tip Sheet

Used to void documents or fix errors in scanned documents

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.

1. Open Clinical Document Viewer
2. **Select Type**- Should be set to Client
3. **Select All or Individual Client**- Choose Individual
4. **Select Client**- Enter client Avatar ID or client's name (last name, first name)
5. **Episode**- Choose the episode that the document was scanned into, you can also choose non-episodic.
6. The above fields are the only fields you will need to enter data into. Click on Process at the bottom of the form.

The screenshot displays the 'CLINICAL DOCUMENT VIEWER' interface. At the top, there are tabs for 'Search' and 'Results'. Below this is a section for 'Select Search Criteria' with the following fields:

- Select Type:** A dropdown menu set to 'Client'.
- Select All or Individual Client:** Radio buttons for 'All' and 'Individual', with 'Individual' selected.
- Select Client:** A text input field containing 'TEST, LUKAS (788475565)'.
- Program:** A dropdown menu with options: 'zAccess Team - Adult', 'zAccess Team - Child and Family', and 'zRO-Healthy Families-El Camino'.
- Episode:** A dropdown menu showing 'Episode #17 Admit : 02/07/2022 Discharge : P...'.

Below these are fields for 'User:' (empty), 'Document Status:' (checkboxes for 'Final' and 'Void'), and 'Document Source:' (checkboxes for 'Batch Scanning Module', 'Document Routing', 'POS Scan / Import', and 'Web Service API').

At the bottom, there are 'Document Origination Date' fields for 'Start:' and 'End:' with calendar icons. A 'Form Selection' section includes radio buttons for 'Entire Chart' (selected), 'Legal Medical Record', and 'By Categories / Forms'. A 'Select' button is next to it. To the right, 'Form Restrictions' are listed with 'Include' and 'Exclude' radio buttons: 'Do Not Print' (Exclude selected), 'Do Not Release' (Exclude selected), and 'Archived Documents' (Exclude selected). A large black arrow points from the 'By Categories / Forms' option to the 'Process' button at the bottom center. The 'Process' and 'Close' buttons are located at the bottom of the form.

- A list of all documents scanned in that client's chart under the episode you chose will appear. Click on the document that needs to be corrected.

CLINICAL DOCUMENT VIEWER

Search | Results

- Search Results
 - Client
 - Form Categories


View	Print	Client ID	Client Name	Episode	Linked Record	Document Description	Document Date	Document Status	Form Name	User
<input type="checkbox"/>	<input type="checkbox"/>	788475565	TEST.LUKAS	17		Adult Mental Status Exam-Avatar MSE	03/30/2022	Final	Avatar MSE	Sarah Saldivar
<input type="checkbox"/>	<input type="checkbox"/>	788475565	TEST.LUKAS	17		Adult Mental Status Exam-Avatar MSE	03/03/2022	Final	Avatar MSE	Sarah Saldivar
<input type="checkbox"/>	<input type="checkbox"/>	788475565	TEST.LUKAS	17		Adult Mental Status Exam-Avatar MSE	02/23/2022	Final	Avatar MSE	Sarah Saldivar
<input type="checkbox"/>	<input type="checkbox"/>	788475565	TEST.LUKAS	17		bbbb	02/02/2022	Final	Client Corresp...	Sarah Saldivar
<input type="checkbox"/>	<input type="checkbox"/>	788475565	TEST.LUKAS	17		Core Assessment-Avatar Core Assessment	02/23/2022	Final	Avatar Core A...	Sarah Saldivar
<input type="checkbox"/>	<input type="checkbox"/>	788475565	TEST.LUKAS	17		Mother's Name - 2022 ROI	01/27/2022	Final	Release of infor...	Sarah Saldivar
<input type="checkbox"/>	<input type="checkbox"/>	788475565	TEST.LUKAS	17		Progress Note Entry-Avatar Progress Note	03/30/2022	Final	Avatar Progres...	Sarah Saldivar
<input type="checkbox"/>	<input type="checkbox"/>	788475565	TEST.LUKAS	17		Progress Note Entry-Avatar Progress Note	03/30/2022	Final	Avatar Progres...	Sarah Saldivar
<input type="checkbox"/>	<input type="checkbox"/>	788475565	TEST.LUKAS	17		Progress Note Entry-Avatar Progress Note	03/18/2022	Final	Avatar Progres...	Sarah Saldivar
<input type="checkbox"/>	<input type="checkbox"/>	788475565	TEST.LUKAS	17		Progress Note Entry-Avatar Progress Note	03/17/2022	Final	Avatar Progres...	Sarah Saldivar
<input type="checkbox"/>	<input type="checkbox"/>	788475565	TEST.LUKAS	17		Progress Note Entry-Avatar Progress Note	03/03/2022	Final	Avatar Progres...	Sarah Saldivar
<input type="checkbox"/>	<input type="checkbox"/>	788475565	TEST.LUKAS	17		Progress Note Entry-Avatar Progress Note	03/03/2022	Final	Avatar Progres...	Sarah Saldivar
<input type="checkbox"/>	<input type="checkbox"/>	788475565	TEST.LUKAS	17		Progress Note Entry-Avatar Progress Note	02/15/2022	Final	Avatar Progres...	Sarah Saldivar
<input type="checkbox"/>	<input type="checkbox"/>	788475565	TEST.LUKAS	17		Progress Note Entry-Avatar Progress Note	02/10/2022	Final	Avatar Progres...	Sarah Saldivar
<input type="checkbox"/>	<input type="checkbox"/>	788475565	TEST.LUKAS	17		test	03/10/2022	Final	Client Corresp...	Sarah Saldivar
<input type="checkbox"/>	<input type="checkbox"/>	788475565	TEST.LUKAS	17		test	02/24/2022	Final	Testing/Evalu...	Sarah Saldivar

- This will allow you to view the document to confirm you have the correct document. If the document is correct, click on the Void button on the bottom of the form.

CLINICAL DOCUMENT VIEWER


Search | Results

- Search Results
 - Client
 - TEST,LUKAS
 - All Documents
 - Adult Health Ques
 - Adult Health Ques
 - Adult Health Ques
 - Adult Mental Stat.
 - Adult Mental Stat.
 - Adult Mental Stat.
 - bbbb
 - Core Assessment-
 - Mother's Name - 2
 - Progress Note Ent
 - Progress Note Ent
 - Progress Note Ent
 - Progress Note Ent
 - Progress Note Ent
 - Progress Note Ent
 - Progress Note Ent
 - test
 - test
 - TIF
 - Uncle Test - ROI :
 - All Form Categories
 - All Forms
 - Form Categories



PDF
ROI Example.pdf

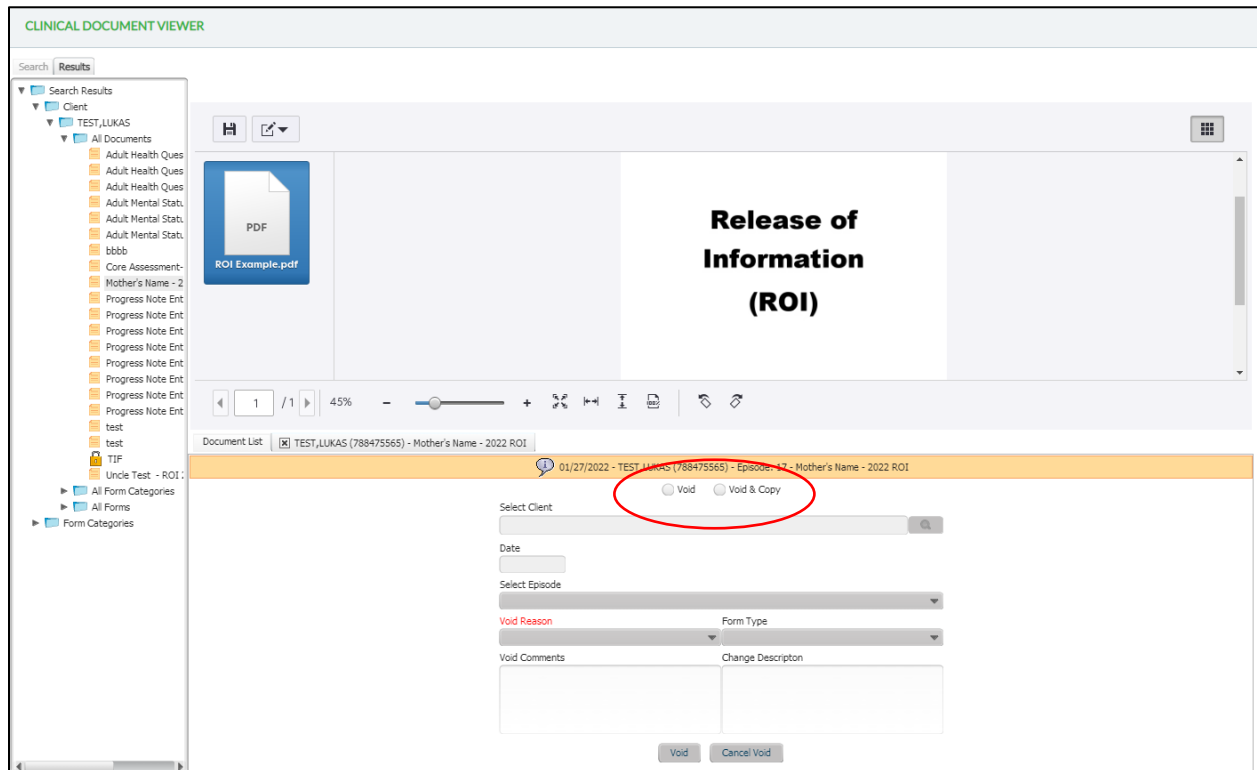
Release of Information (ROI)



Document List | TEST,LUKAS (788475565) - Mother's Name - 2022 ROI



9. You have the option to void the document or correct the document. To void the document you will choose the Void option, to make corrections to the document click Void & Copy.



10. If the document needs to be voided choose the Void option, enter your **Void Reason**, and comments on why the document needs to be voided. Click on Void on the bottom of the form.
11. If the document needs to be corrected choose the Void & Copy option, enter your **Void Reason**, and comments on why the document needs to be voided. You are able to make the below corrections:
- Move the document to another client's chart by entering in the correct client under Select Client.
 - Change the document date. Enter the correct date in the Date field.
 - Move the document to a different episode. Select the correct episode in the Select Episode drop-down. This can also be used to move non-episodic documents to their correct episode.
 - Form Type drop-down will allow you to move a document into a different folder.
12. Multiple corrections can be made at once. Click on the Void button on the bottom once completed.
13. A document can only be voided or corrected once. If a document that has already been corrected needs to be voided you will have to contact the Avatar Team.