

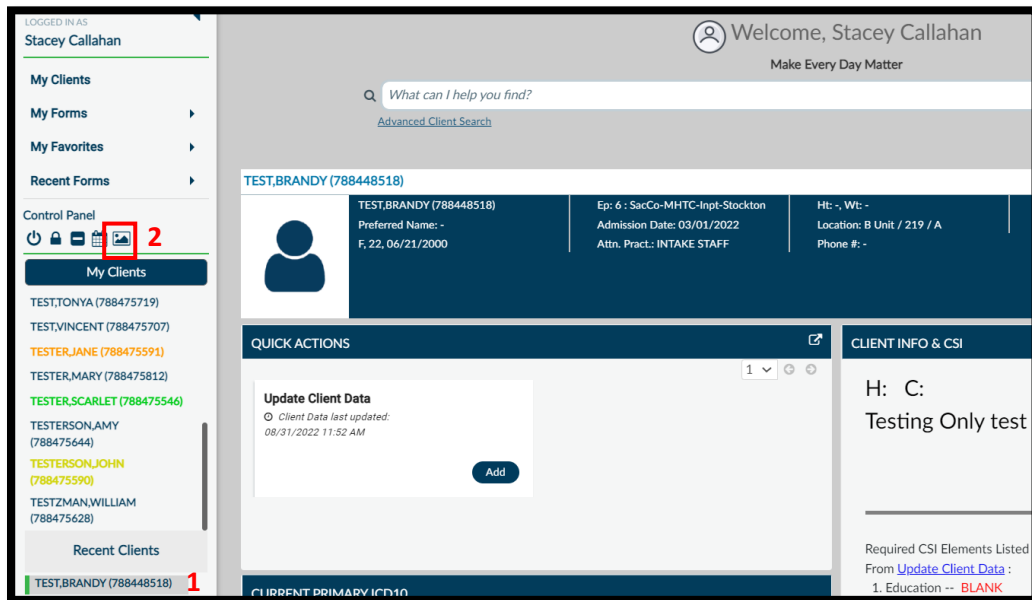
Document Capture Tip Sheet

Purpose of this Tip Sheet:

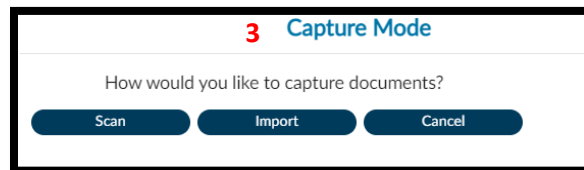
This tip sheet is designed to be an additional tool for Avatar NX users who have been trained on Document Capture. The Tip Sheet may change as Avatar NX trainings are updated. If you have any additional questions please contact Avatar Support at 916-876-5806 or Avatar@Saccounty.net.

Scanning:

1. Select your client, if they are not currently on your recent client list you can search for them in the “What can I help you find?” search bar.
2. Click the Document Capture icon on the Control Panel.

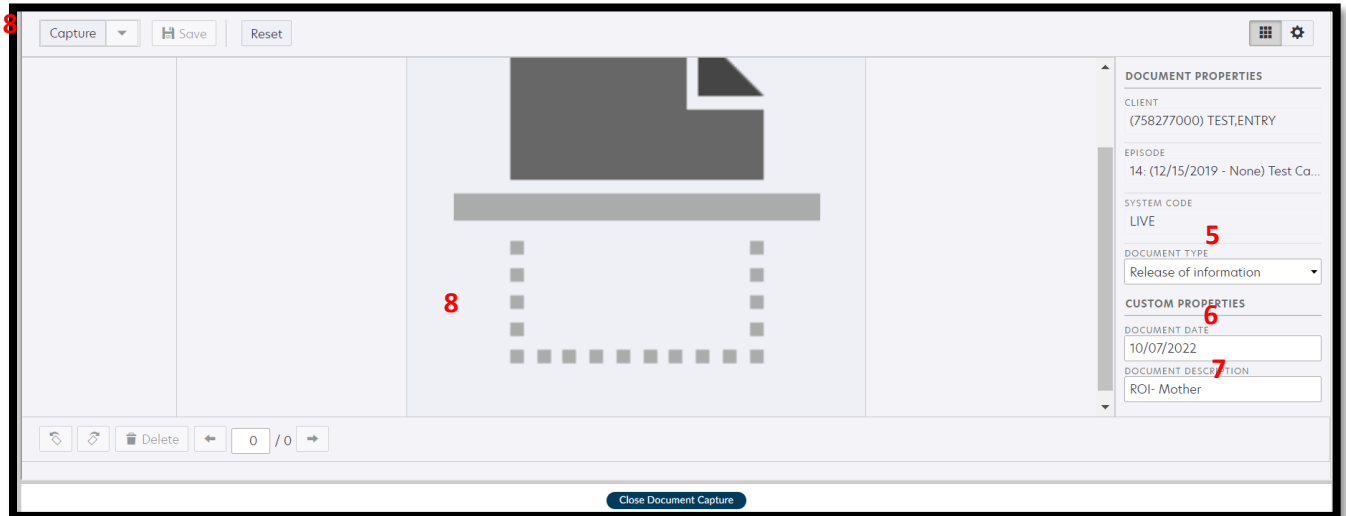
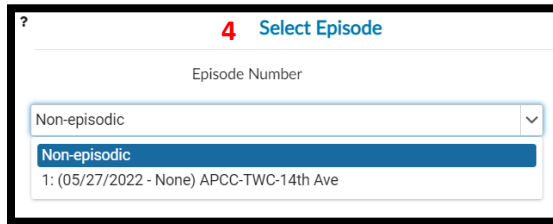


3. A prompt will come up asking if you want to Scan, Import, or Cancel. Scan would only be used if a hard scanner is hooked up to that computer. Import is used if the document was scanned and saved to your computer. Choose the appropriate option.

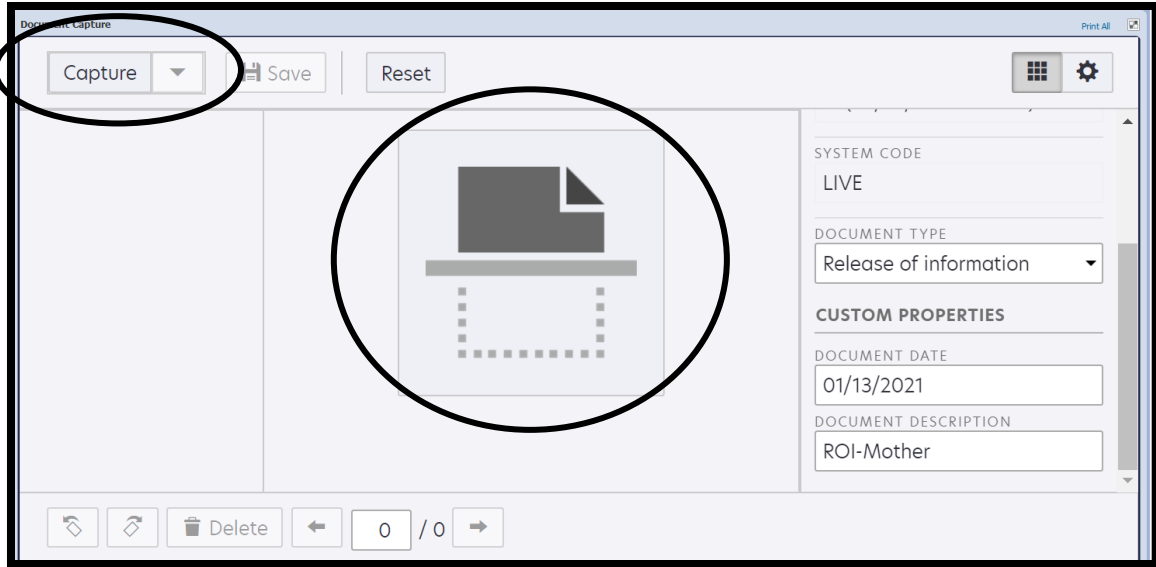


4. Another prompt will ask what episode you want to save the document in. The default is Non-episodic, make sure to change this to your episode. If a document is scanned into

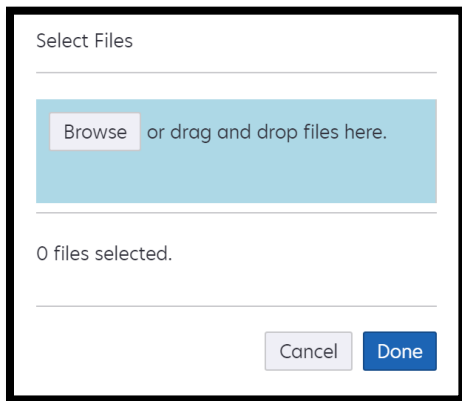
Non-episodic everyone will have access to that document. You will only see the episodes within your system code.



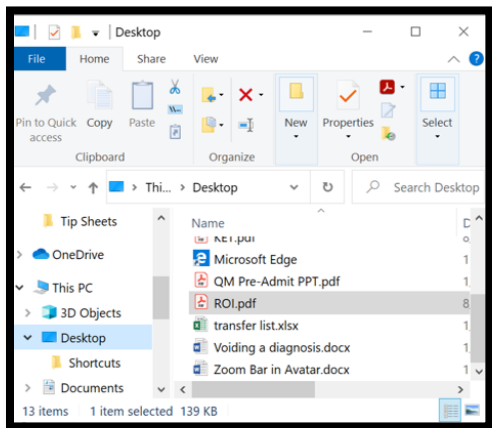
5. The Document Type will list the different folders or categories a document can be saved into. You may not have access to all folders. For example if you work for an outpatient mental health program you would not have access to folders specific to Access, MHTC, or alcohol and drug programs. If you are unsure which category to scan the document into you can reference QM's Sacramento County Scanned Document Management form. The form can be found on their website, <https://dhs.saccounty.net/BHS/Pages/Utilization-Review/GI-Provider-Resources-Utilization-Review.aspx>.
6. The Document Date will default to today's date. This should be the origination date of the document, not the date you're importing the document.
7. Enter a detailed Document Description. If all documents are named the same you will have difficulty locating your document in the future.
8. There are two methods you are able to use when scanning.
 - 8a. Browse Forms
 - a. Click on the center Scan button OR click on the Capture button.



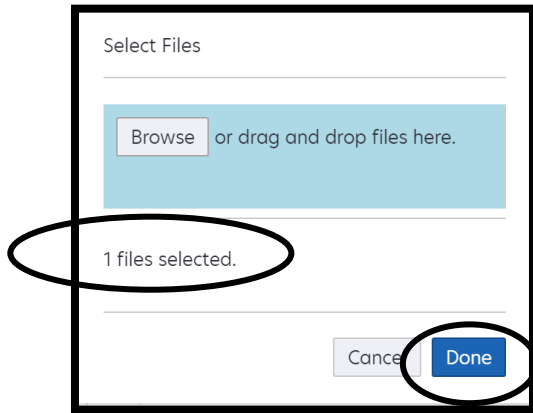
b. A box will populate. Click on the Browse button.



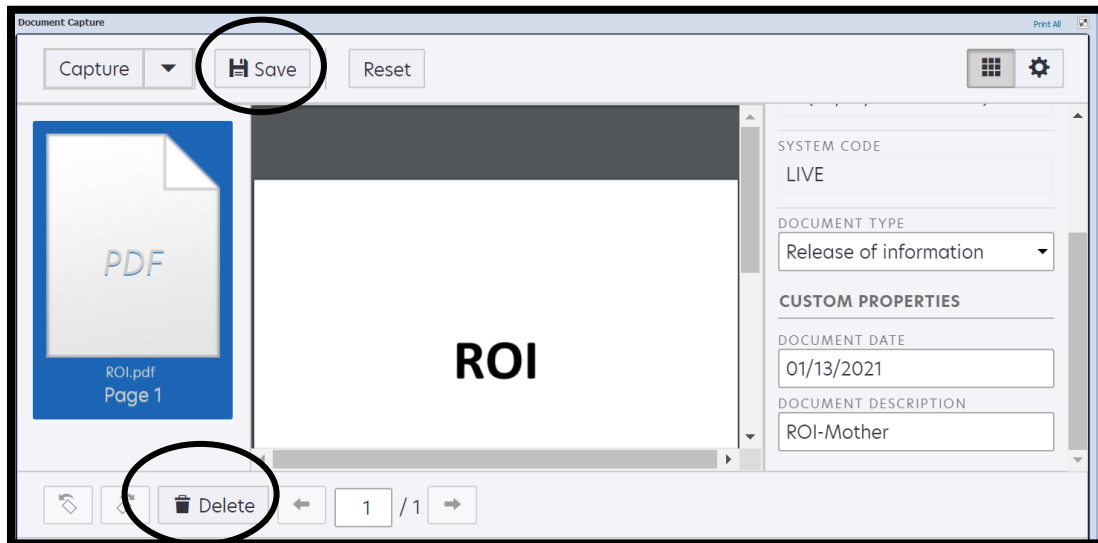
c. You are able to browse through your folders to find the document you are scanning. Once you've found the document double click to select.



- d. Once your document has been selected it will bring you back to the Browse box. You can see a file has been selected. Click on the Done button.

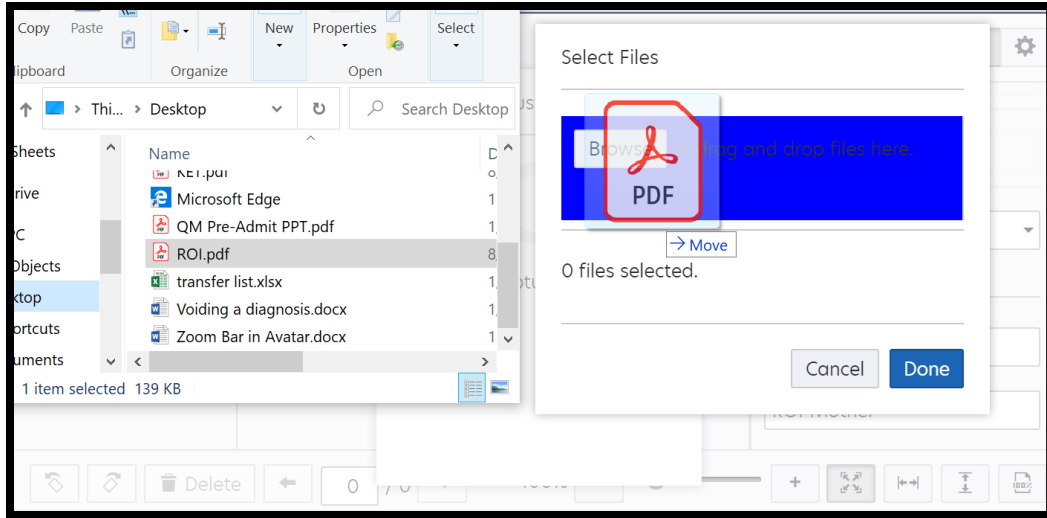


- e. You will be brought back to the original page. Here you are able to see a preview of the document. If you are happy with the document you will click Save at the top to save the document into the client's chart. If you do not want to save the document you can click the Delete button at the bottom of the screen.



8b. Drag and Drop

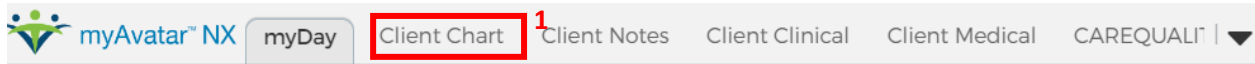
- Click the Capture button OR Scan button.
- Open your File Explorer in a separate window. Locate the item you want to scan and drag it and drop into the Browse box.



c. Continue with steps d&e above.

Viewing Scanned Documents

1. Click on the “Client Chart” console at the top of your Avatar NX screen.

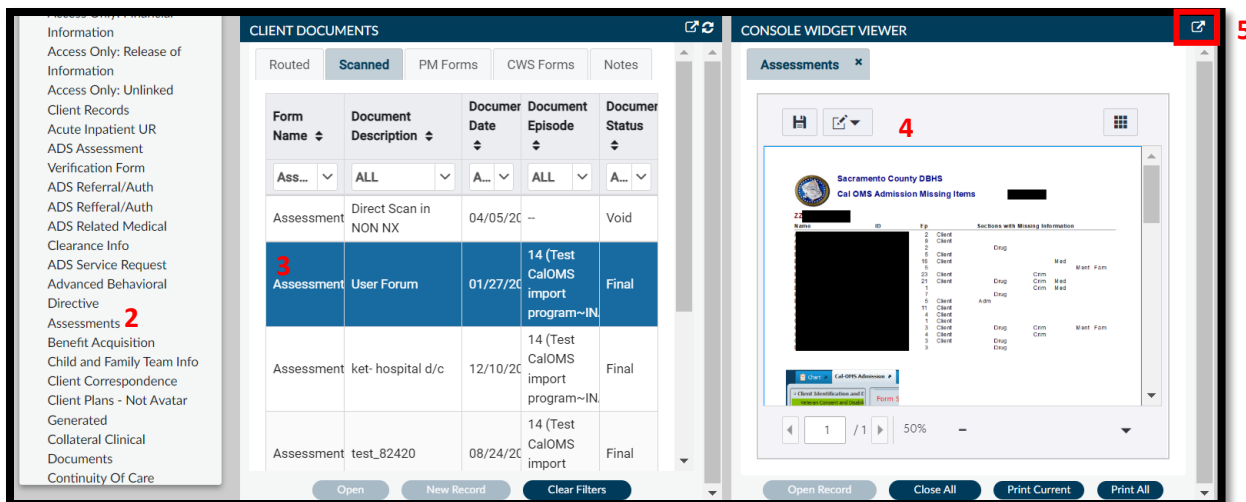


2. Under the “Scanned” category, choose the category you scanned into.

3. In the “Client Documents” widget select the document you want to view.

4. The document will show on the “Console Widget Viewer”.

5. You can undock the Console Widget Viewer to see the document larger. If you do this you will need to undock before selecting the item. If you’ve already selected, just click on it again after undocking.



Voiding and Correcting Documents

1. Open the “Clinical Document Viewer” form
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 'Select Search Criteria' section with the following fields:

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

Below these are additional search filters:

- User:** An empty text input field.
- Document Status:** Checkboxes for 'Final' and 'Void'.
- Document Source:** A list box containing 'Batch Scanning Module', 'Document Routing', 'POS Scan / Import', and 'Web Service APT'.
- Document Origination Date:** 'Start' and 'End' fields with calendar icons.

The bottom section is titled 'Form Selection' and 'Form Restrictions':

- Form Selection:** Radio buttons for 'Entire Chart' (selected), 'Legal Medical Record', and 'By Categories / Forms'. A 'Select' button is next to the last option.
- Form Restrictions:** A table with columns 'Include' and 'Exclude'.

Form Restrictions	Include	Exclude
Do Not Print	<input type="radio"/>	<input checked="" type="radio"/>
Do Not Release	<input type="radio"/>	<input checked="" type="radio"/>
Archived Documents	<input type="radio"/>	<input checked="" type="radio"/>

At the bottom of the form are 'Process' and 'Close' buttons. A black arrow points from the 'Archived Documents' row in the 'Form Restrictions' table down to the 'Process' button.

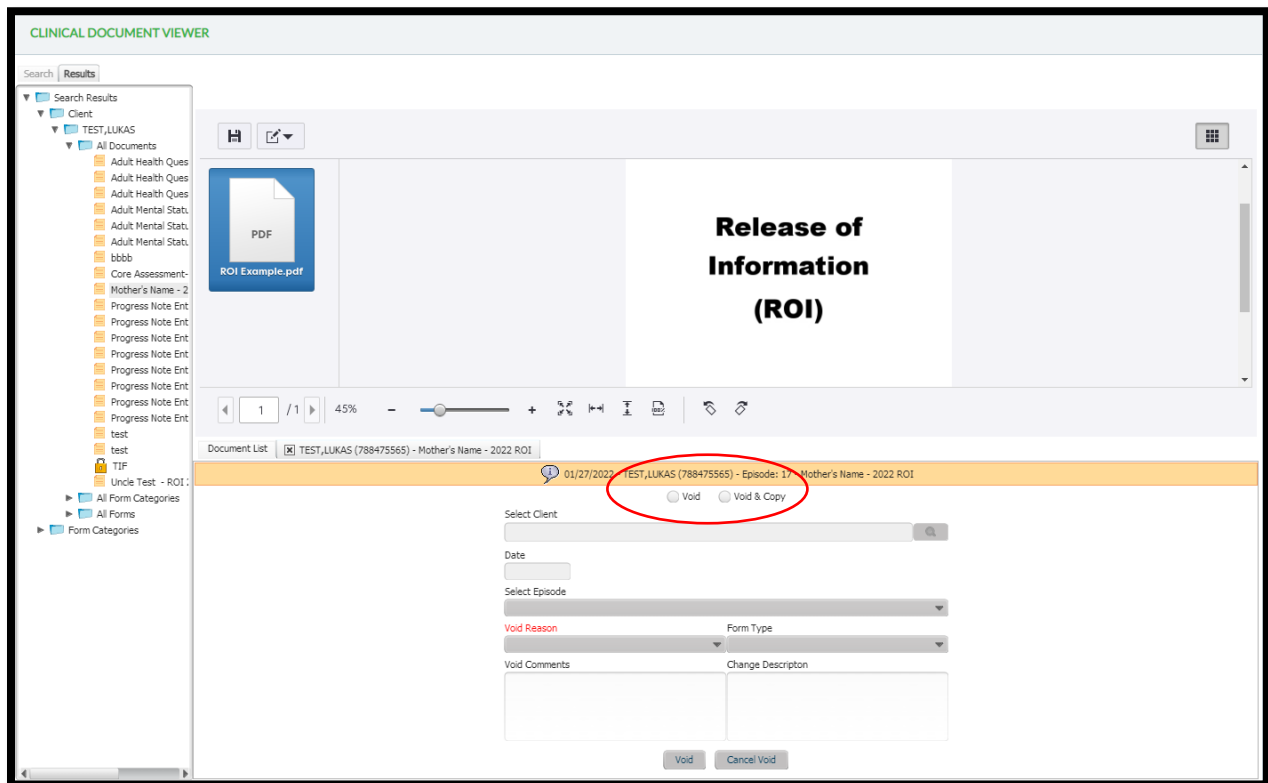
7. A list of all documents scanned in that client's chart under the episode you chose will appear. Click on the document that needs to be corrected.

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	02/25/2022	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/Evalua...	Sarah Saldivar

8. 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.

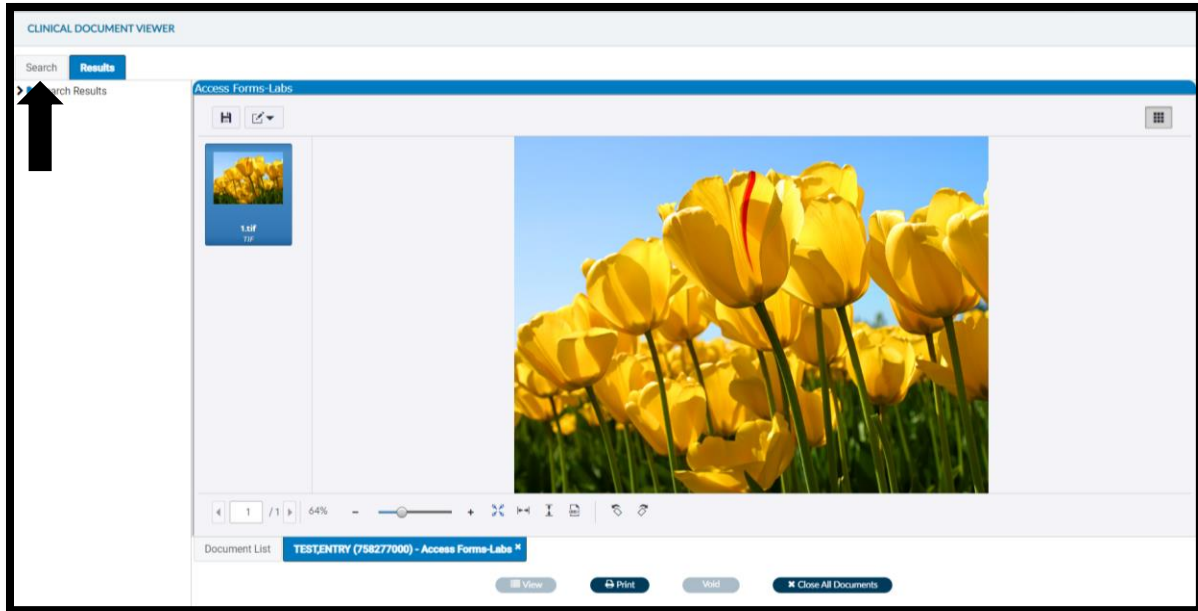
The screenshot shows the 'CLINICAL DOCUMENT VIEWER' interface. On the left, a sidebar displays a search results tree for client 'TEST.LUKAS', listing various documents such as 'Adult Health Ques', 'Adult Mental Statu', 'bbbb', 'Core Assessment-Mother's Name - 2', 'Progress Note Ent', 'test', and 'TIF'. The main area shows a PDF document titled 'ROI Example.pdf' with the text 'Release of Information (ROI)'. At the bottom, a toolbar contains buttons for 'View', 'Print', 'Void', and 'Close All Documents'. A black arrow points to the 'Void' button.

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.

14. To leave the form, click on the “Search” button on the top left of the form.



15. This will bring you back to the main screen. From there scroll down and click “Close”

