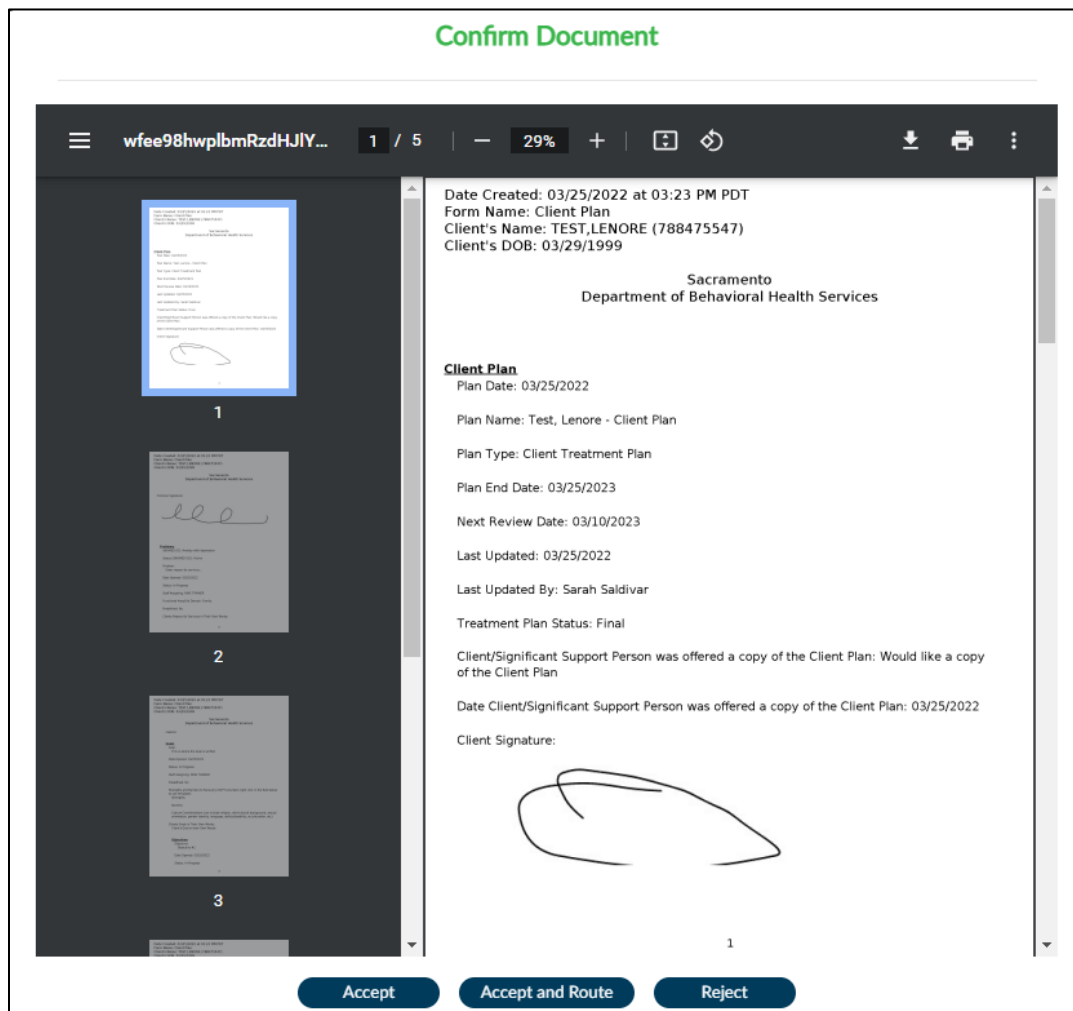


Document Routing Tip Sheet

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

1. When you finalize a Progress Note, Client Plan, or Assessment the Document Routing screen will appear. Based on your classification you may see the following three options.
 - a. Accept- This will only appear if the user does not require a co-signer. If you do not require a co-signer choose this option to finalize.
 - b. Accept and Route- This will appear for those requiring a co-signer. The steps below will explain how to route the document to your supervisor.
 - c. Reject- After reviewing the document, if any changes need to be made you can select Reject to bring you back into the form to make your changes.



- If you choose Accept and Route a box will appear which will allow you to choose who to route the document to. Click on the Supervisor field and enter your supervisor's last name. Click on their name on the drop-down.

The screenshot shows the 'Route Document to' form. The 'Supervisor' field contains the text 'trainer'. A dropdown menu is open, displaying a list of results with the following items:

- ELEVEN TRAINER (018558)
- FIVE TRAINER (018555)
- FOUR TRAINER (010562)
- NINE TRAINER (015252)
- ONE TRAINER (010559)
- SEVEN TRAINER (018532)
- SIX TRAINER LMFT (013509)
- TEN TRAINER (018557)
- THREE TRAINER (010561)
- TWELVE TRAINER (018533)
- TWO TRAINER (010560)

At the bottom of the form, there are 'Submit' and 'Cancel' buttons.

- Click the Add button below the supervisor's name. This will drop them down to the Approver box. Click Submit to route the document to your supervisor.
- You can add additional approvers by adding their name in the box below. All approvers must approve the document before it is finalized. If one of the approvers rejects it, the document will go back to the clinicians To-Do widget.

The screenshot shows the 'Route Document to' form with the 'FOUR TRAINER (010562)' selected in the Supervisor field. Below the Supervisor field, there is an 'Add Approver' section with a checkbox for 'Admitting Practitioner' and a search box. At the bottom, the 'Submit' button is highlighted with a red box.

Approver	Final Approver	Title	Name
<input checked="" type="checkbox"/>		Supervisor	ELEVEN TRAINER (018558)