Introduction to MyAvatar –
Learning how to use the tool

Changes for Existing Users

**Taken from the Netsmart MyAvatar Training Guide v1.3
3/19/2012**

What is *myAvatar*

Netsmart defines myAvatar as "…the user experience that is the result of the configuration of RADplus 2011". myAvatar is a tool kit that provides new possibilities, both in the present and in the future, for increased integration in work flow, usability, and information sharing. It is a completely new user experience. The development was based on work with Blink Interactive, a leading human factors design firm and feedback from existing and prospective Clients."

New Terms and Definitions
myAvatar adds many new functions and changes to the selected terms below:
- Options become Forms
- Tabs become Sections
- Pages/Bookmarks become Subsections
- My Caseload becomes My Clients
- My Favorites becomes My Forms
- Post Its becomes Sticky Notes
- Chart Review becomes Chart View/Chart Overview
- Widgets-A window view of information available on the Home View or Chart View that contains stored data from Avatar or from a 3rd party system

New Functionality
- Client Data Bar & Allergies Display
- Smart Search
- Preferences
- Color Blind Preferences
- Keyboard Shortcuts
- Zooming
- Online Documentation

Client Data Bar & Allergies Display
The *Client Data Bar* displays when a user accesses a client chart. The Client's Name, Sex, Age and Date of Birth are displayed in the Client Data Bar from within the Chart View. To the far right of the Client Data Bar is the Allergies display.
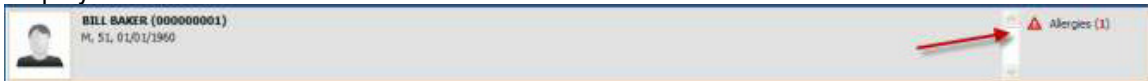

NOTE: The Client Data Bar display cannot be edited.

Smart Search
Smart Search is a new search format that will dynamically display all results as you type in the search criteria. All results conforming to the criteria will display. As more information is entered into the search prompt, the results will be refined. This Smart Search feature is available when searching for Clients, Staff or Forms within *myAvatar*.
- Searching for Clients or Staff: This new format uses the Smart Search. As you type the last name, the drop down will display the client or staff meeting the search criteria.
- You can select the client or staff by double click or by using the arrow keys to move

to the desired client and press Enter to select. Hitting the magnifying glass will launch a search window. If searching for a client you have the ability to select or select and view chart, which will launch the Client's Chart Review.
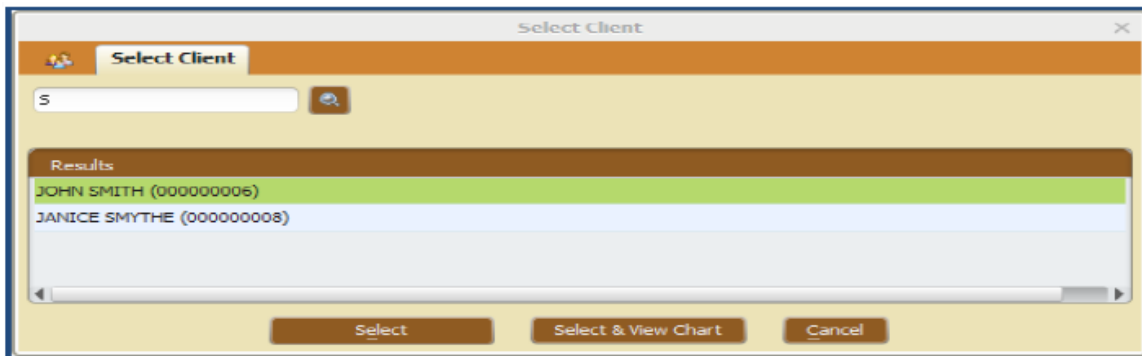
Preferences

The **Preferences** Form can be accessed in the menu bar on the top right of your screen.
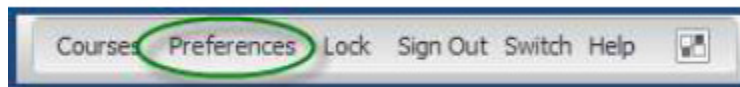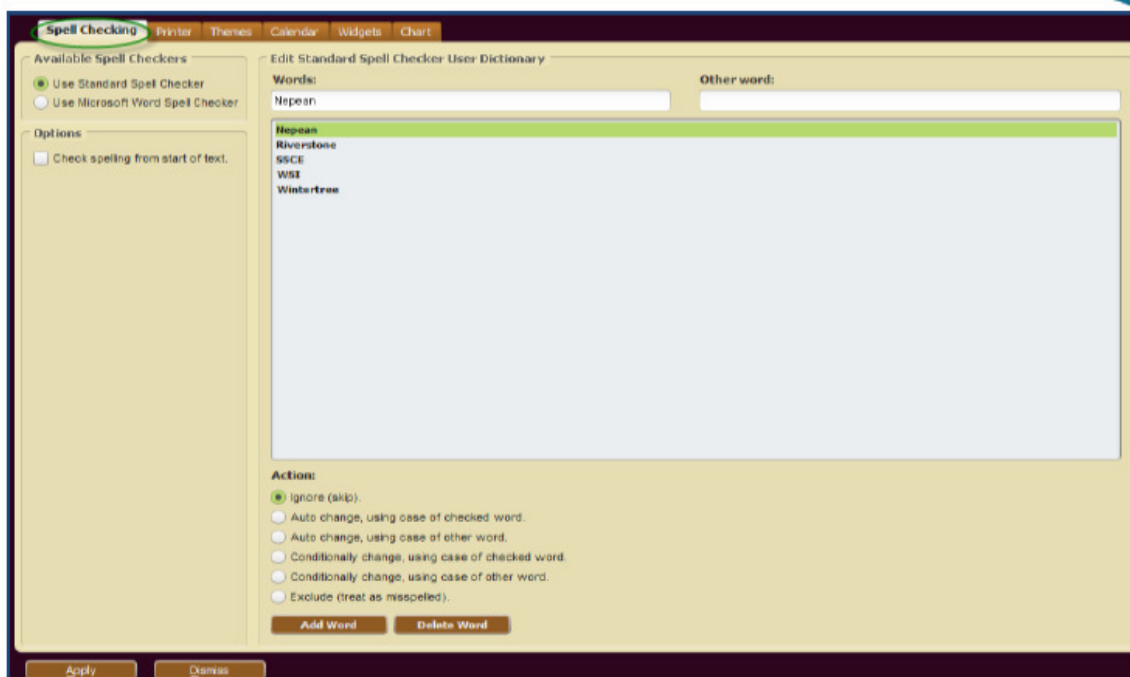

This Form allows the User to define the following basic *RADplus 2011* functionality.

- Spell Checking
- Printer Settings
- Themes
- Calendar
- Widgets
- Chart

Spell Checking:

The *Spell Checking* tab allows Users to define how spell checking is performed throughout Avatar

- The available Spell Checker choices are to the Standard or Microsoft Word Spell Checkers.
- Users can decide whether the spell check process will begin at the start of the text. If this option is not selected, spell check will start at the cursor mark.
- Additions and edits to the Spell Checker User Dictionary can be made within this tab.

Spell Checking Use
- Fields with spelling errors will be underlined in red. Users can either click F7 or right click a misspelled field and select Spell Check.
- The Check Spelling dialog box will launch that will allow you to check the spelling and choose a new spelling or ignore.
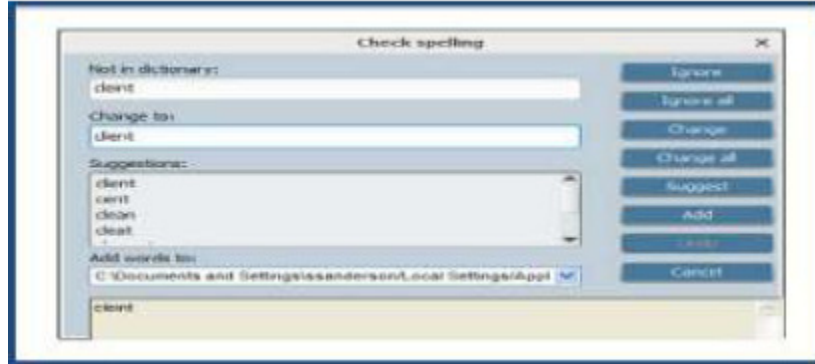

Using Microsoft Spell Checker
- Users that choose to use Microsoft Spell checker will receive the following warning message upon selecting "Use Microsoft Word Spell Checker" within the Preferences screen. The warning message informs the use of a known issue with using Microsoft word as the Spell Checker in a *RADplus 2011* environment. The spell check window will appear behind the *myAvatar* session when it is launched for spell checking functions. Users must move to the hidden window and acknowledge the spell check edits.
-
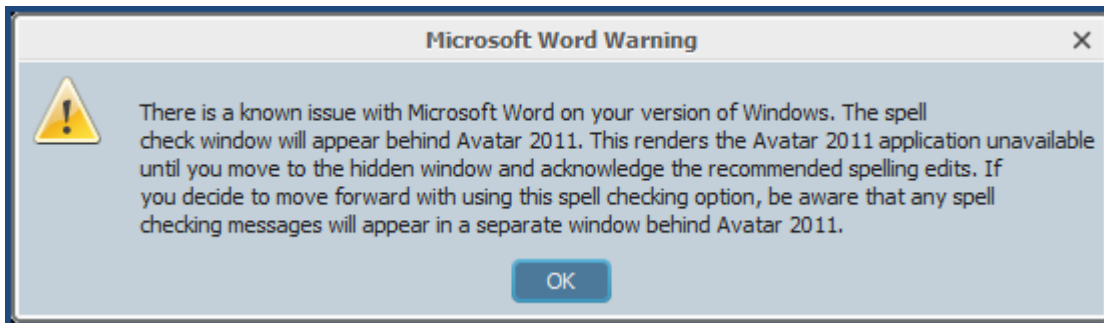
Printer:
The **Printer** tab allows Users to select the printer and fonts to be used when printing Avatar information.
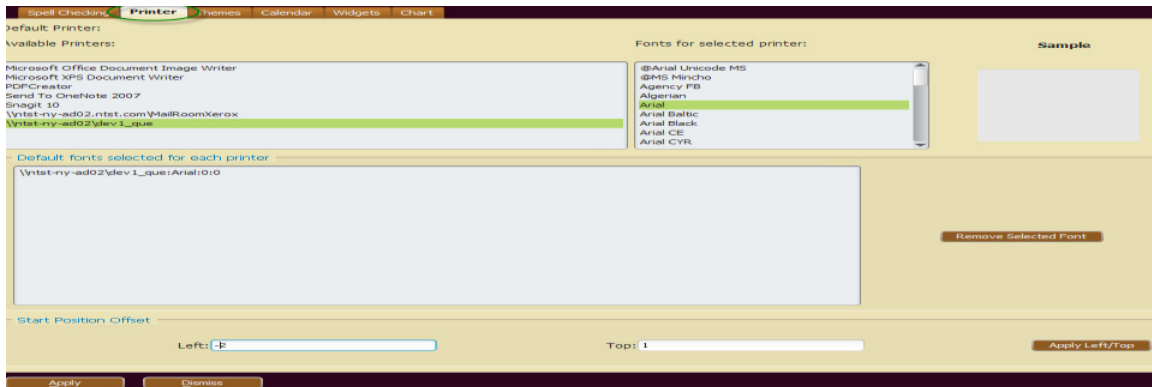
- In the *Top* Field, enter a positive number to move the start position down. Enter negative numbers to move the top start position up.

Themes:

The *Themes* tab allows Users to select a default color theme for the Avatar application. **In order for the new theme to take effect, Users must log out of the *myAvatar* session, close the browser and re-launch the Avatar system.**
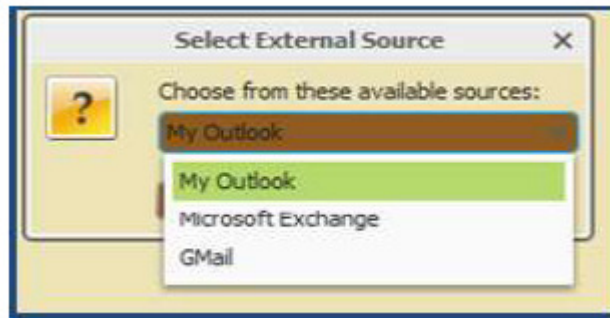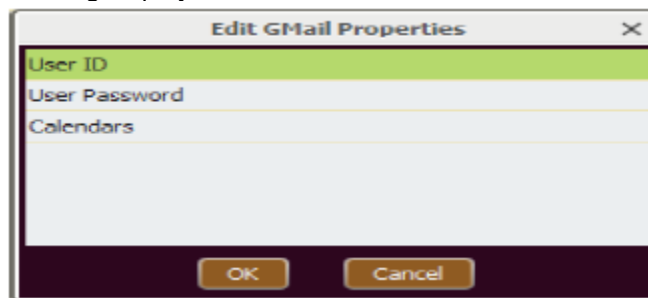

Calendar:

The *Calendar* tab allows Users to select an external source to include personal appointments in the Avatar calendar display.

- Press the *Add Source* button to add a new calendar source. The current choices available are My Outlook, Microsoft Exchange and Gmail.
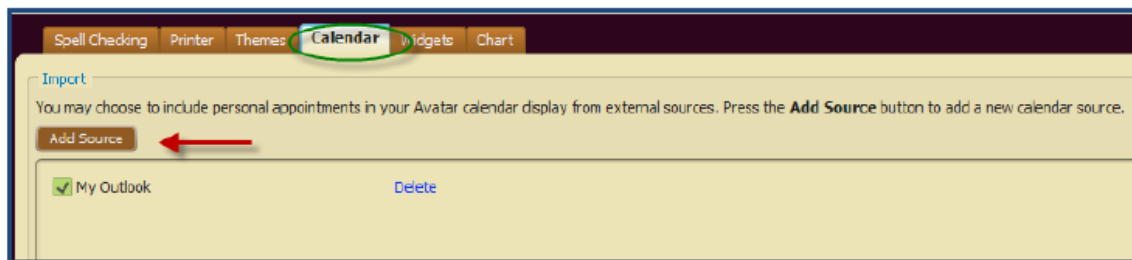
- In the *Select External Source* dialog, choose the email source.
- Click *Ok*.
- If appropriate, click *Configure* to change email properties for the account.
- The account properties dialog displays. Enter the details, click *Ok*.


- The *Calendar Widget* will now display the appointments from the linked external source, as shown below. In addition, the appointments entered into the *Scheduling Calendar Form* will display within the Calendar Widget.

Note- If you wish to choose My Outlook as an available source when configuring your Calendar, you must be using Microsoft Exchange 2007 or 2010.

Widgets:

The *Widget* tab of the *Preferences* Form is the *Home View Designer* screen. This is similar to the *View Definition* Form that is used to define the Home and Chart View displays that are then assign d to Users in either *User Definition* or *User Role Definition.* The *View Definition* Form grants access to Widgets to work with when making modifications using the *Preferences* screen

View Definition Form
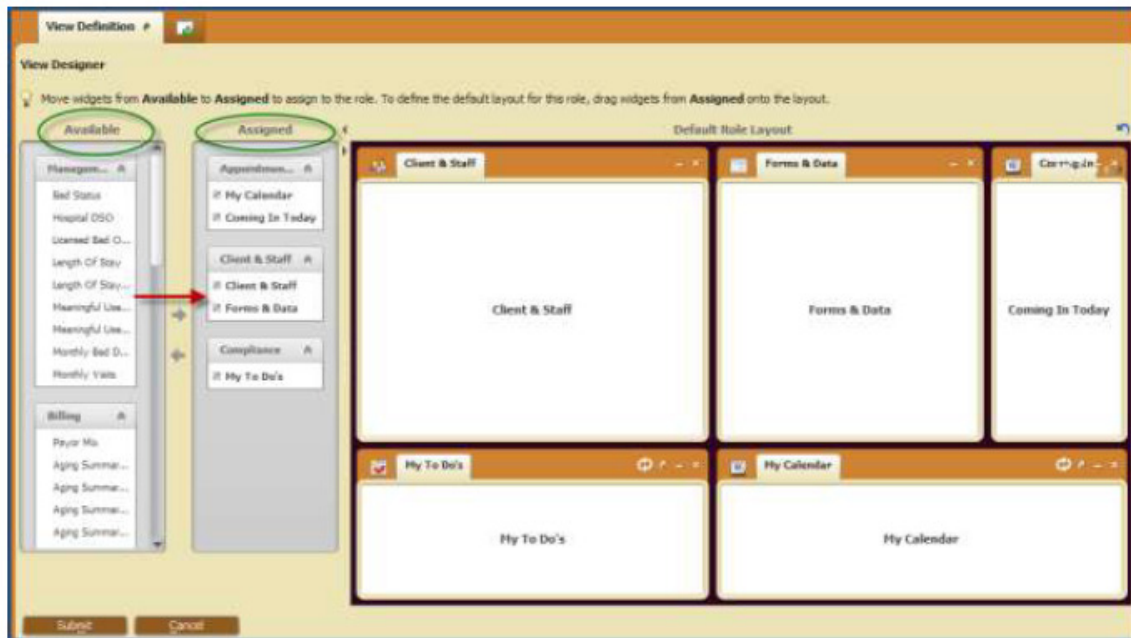
Home View Designer

Changes made to the *Home View Designer* screen with the *Preferences* Form will be specific to that User. Any Widget assigned to the *View Definition* associated with the User within either the *User Definition* or *User Role Definition* Forms will appear in the 'Assigned' column of the *Home View Designer* screen. Users can add these Widgets and resize or move the Widgets to their preferred display.
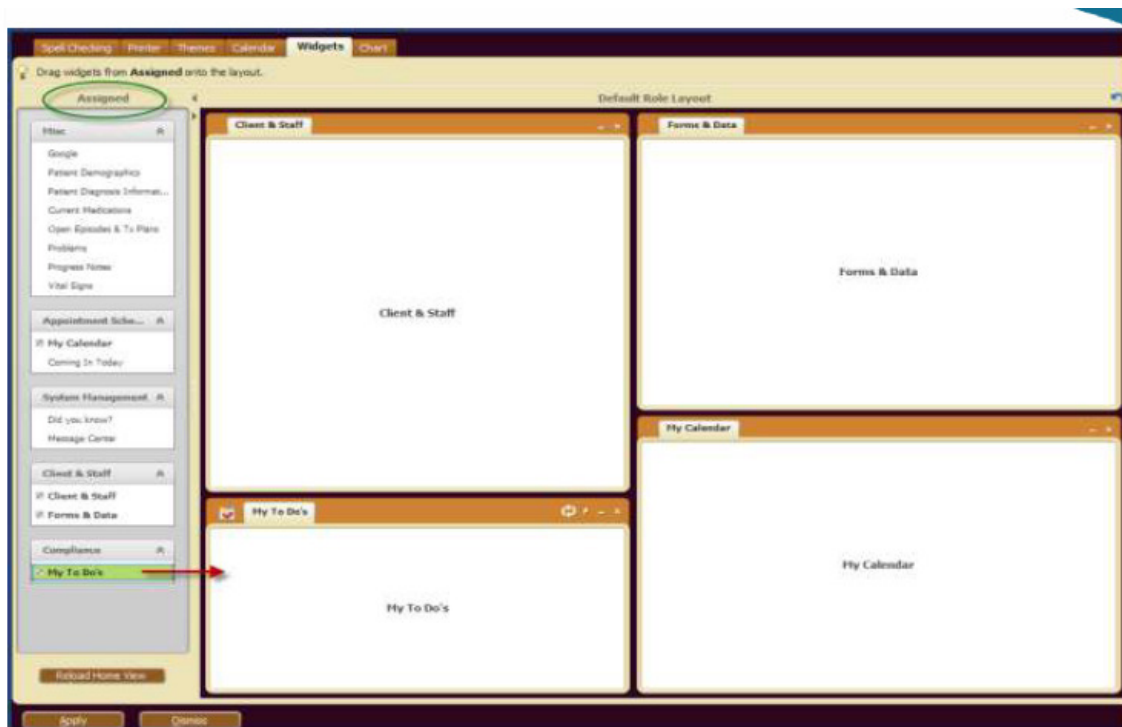
Changes made within the *Home View Designer* screen will not be permanently saved unless the View associated with the User has the 'Allow User to Customize View' question set to 'Yes' within *View Definition* Form. If the 'Allow User to Customize View' question is set to 'No' then any modifications a User makes within the *Home View Designer* screen will be reset to the User's original Home View after logging out of Avatar.

Chart:

The *Chart* tab of the *Preference* Form allows a User to define what data should appear within the *Chart View*.
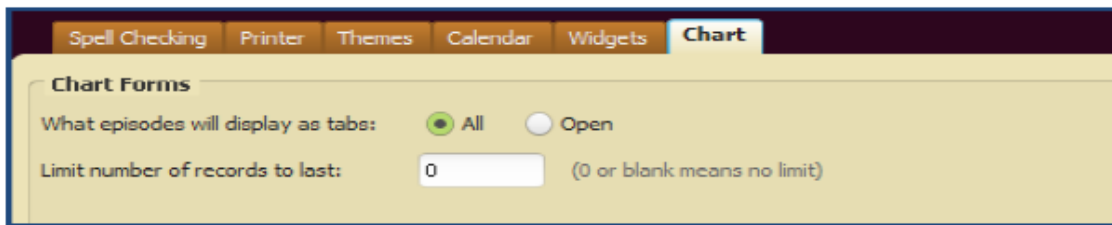
- In the What episodes will display as tabs field:
- Select *All* to display all client episodes in Chart View.
- Select *Open* to display open client episodes in Chart View.
- In the Limit number of records to last field:
- Enter the number of client records to display in the Chart Overview

Color Blind Preferences

myAvatar allows the User to change his or her color blind setting within the user's *Preferences* screen. There are two setup steps that must be followed in order to activate the Colorblind question within the *Preferences* screen.

*Please note that a setting must be set to a user's individual account by the Avatar team in order for this feature to be enabled for you.
Please contact avatar@saccounty.net if this is a feature that you want to utilize.

Keyboard Shortcuts

myAvatar incorporates the use of keyboard shortcuts. Click the *Alt* key displays the *RADplus Utilities 2011* keyboard shortcut keys. Different keyboard combinations may display, depending on the form or widget being displayed.

- Click *Alt* to display the keyboard shortcut.
- Clicking the number or letter will display the item. For example, to enable the Search Forms field,click 'A'.
- Use the keyboard to navigate through the selections.
  - Clicking *F5* will clear the selection in a drop down list or radio button field

Zooming

myAvatar allows Users to change the size of text and fields in a Form by zooming. The zoom bars located at the bottom right of an open Form. There are different ways to zoom:


- Click and hold the zoom slider
- Click the plus or minus buttons to zoom in or out by 10%.
  - Click the zoom level to display the Zoom Level screen
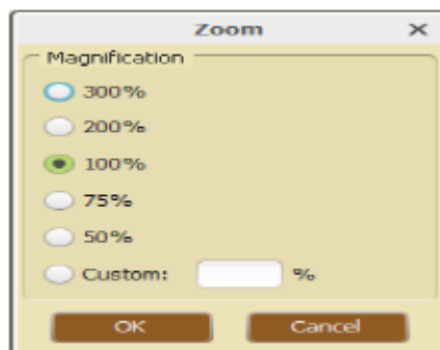
- Select a zoom percentage, or click Custom to enter a specific zoom level and then click Ok.
- The zoom setting for a Form is saved even after exiting the Form or logging out of Avatar.

Online Documentation

myAvatar allows Users to access Online Documentation from within any Form. The link to the Online Documentation is located on the left bar of the Form display. The Online Documentation will open in a new browser window to the section that addresses the Form the User currently had open.
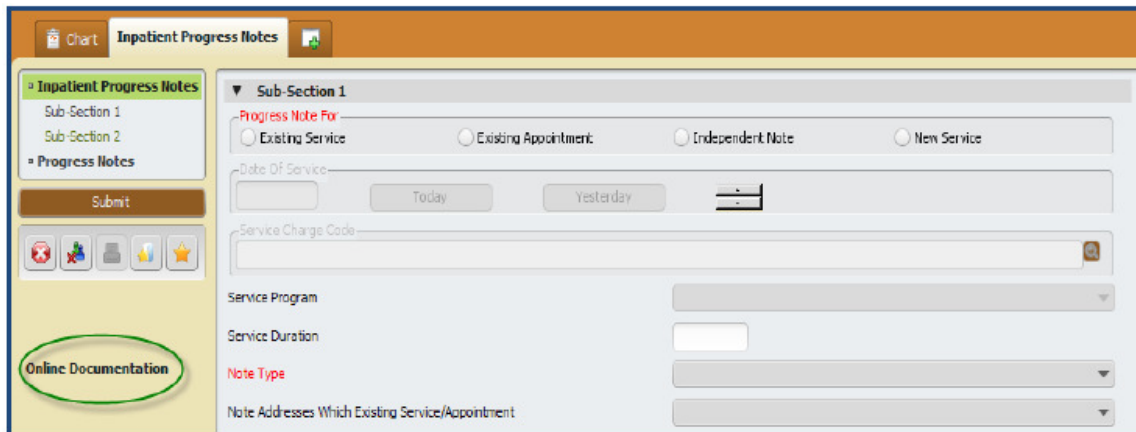

Client/Staff Widget:

The *Client/Staff Widget* provides the ability to display a list of current clients and staff. Below is an outline of each tab of this Widget.

Client Tab
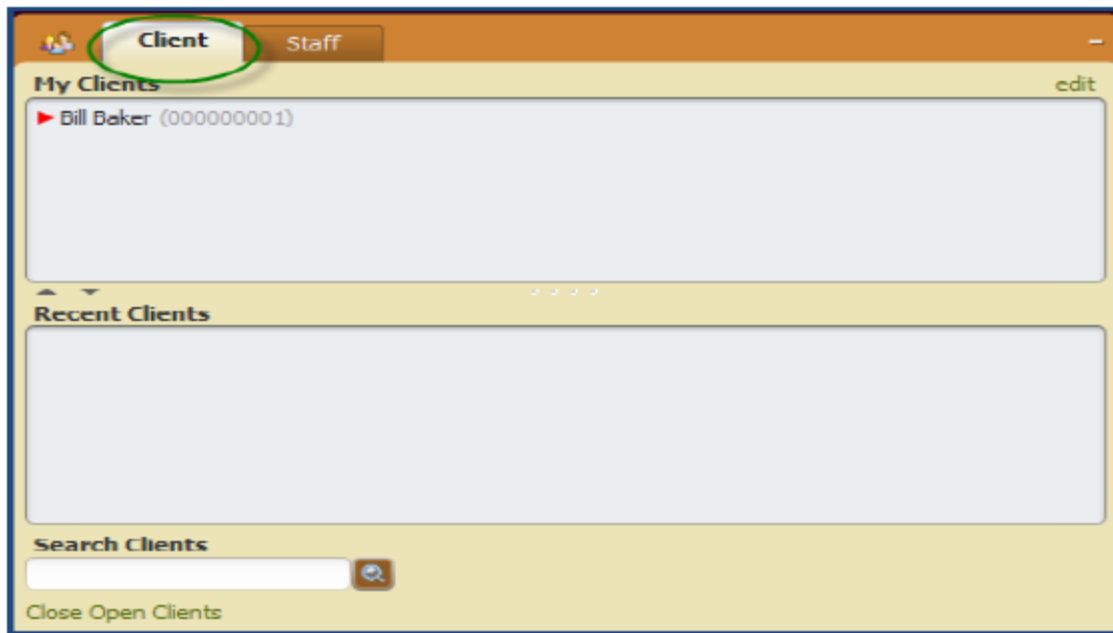
• My Clients (Previously My Caseload): will display a list of all clients assigned to the Practitioner's Caseload. This assignment is done either at the time of admission or through the assignment of the Attending Practitioner.

• In addition, the User has the ability to add clients for their current session by selecting 'edit' on the top right of the Widget. These added clients will only appear for the current session. Those client assigned to the User's caseload will always appear.
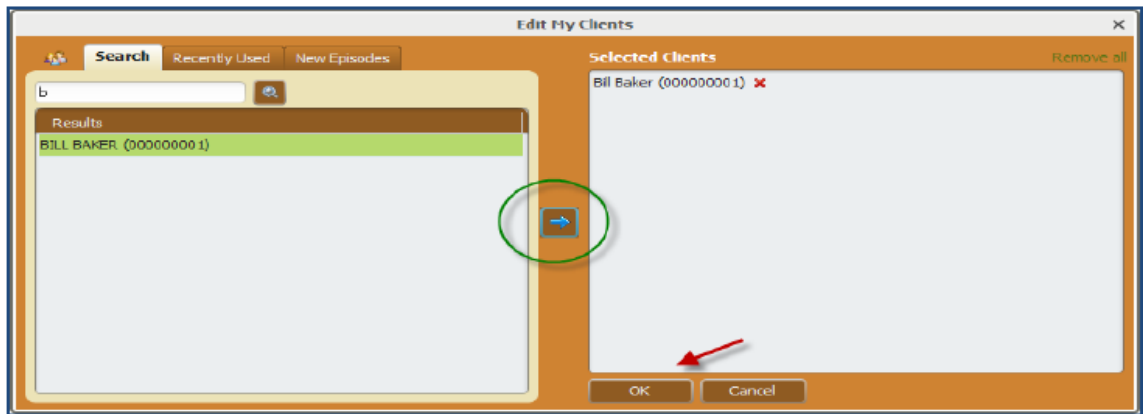
• Recent Clients: List of clients you have accessed in this session. This list will be reset at log out. Right mouse click to *Display Chart* or *Remove from List*. You can drag and drop a client from your Recent Client list up to the My Staff list and it will permanently add that staff person to your list of staff.

Compliance Indicators in Client/Staff Widget:
Compliance Indicators appear on the Client/Staff Widget and represent different levels of compliance. The indicators will show compliance for either rules defined in User Defined Assessments or To-Do List compliance. There are three different Compliance Indicator Icons outlined below:

A. User Defined Assessment Out of Compliance Rule Indicator:
Compliance Indicators are used to show the status of completion of a Modeled Form. This is a convenient way for Clinicians to keep track of completing important assessments on time.

> ▪ **Open Red Indicator**- This indicator will show if a client is out of compliance based on a compliance rule defined in a User Defined Assessment. This will be the first Compliance Indicator viewed. This means, even if they are out of compliance with To-Do items, this will be the first indicator viewed on the Client/Staff Widget. This Compliance Indicator will also appear in the Client's Chart View if the Form that has a Compliance Rule defined is included in Chart View.

> Bill Baker (000000001)
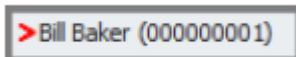
**B. To-Do List Out of Compliance Rule Indicator:**
Compliance Indicators are used to show the status of compliance of To-Do Items.
> ▪ **Closed Red Indicator**-This indicator will show if a client has To-Do Items that need to be addressed. If a client is out of compliance on a User Defined Assessment based on a compliance rule, this indicator will not appear until the Assessment has been marked as in compliance.


> ► Janan Robilotta (000000012)

C. In Compliance Rule Indicator:
▪   Closed Black Indicator- This indicator will show if a client is in compliance with both To-Do items and User Defined Assessment Compliance Rules.


> ► Janice Smythe (000000008)
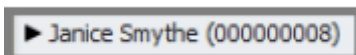
Staff Tab
• Search Clients/Search Staff: This new format uses the *Smart search*. As you type the last name, the drop down will display the client or staff meeting the search criteria.
• You can select the client or staff by double click or by using the arrow keys to move to the desired client and press *Enter* to select. Hitting the magnifying glass will launch a search window.

• If searching for a client you have the ability to select or select and view chart, which will launch the Client's Chart Review.
• My Staff: The My Staff tab on the Client/Staff Widget will display the Staff Member associated with the currently logged in User. In addition, If a user is associated with a site then all of the staff for that site will display under the My Staff list. In addition, Users have the ability to add staff for their current session by selecting 'edit' on the top right of the Widget. These added staff will only appear for the current session.
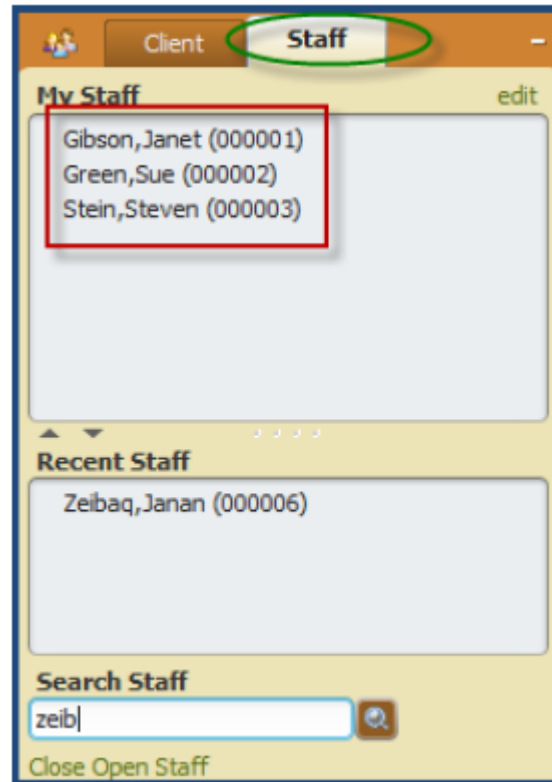
- Recent Clients/Recent Staff: List of clients/staff you have accessed in this session. This list will be reset at log out. Right mouse click to *Display Chart* or *Remove from List*. You can drag and drop a staff from your Recent Client list up to the My Staff list and it will permanently add that staff person to your list of staff.
- Search Clients/Search Staff: This new format uses the *Smart search*. As you type the last name, the drop down will display the client or staff meeting the search criteria.
- You can select the client or staff by double click or by using the arrow keys to move to the desired client and press *Enter* to select. Hitting the magnifying glass will launch a search window.
- If searching for a client you have the ability to select or select and view chart, which will launch the Client's Chart Review.
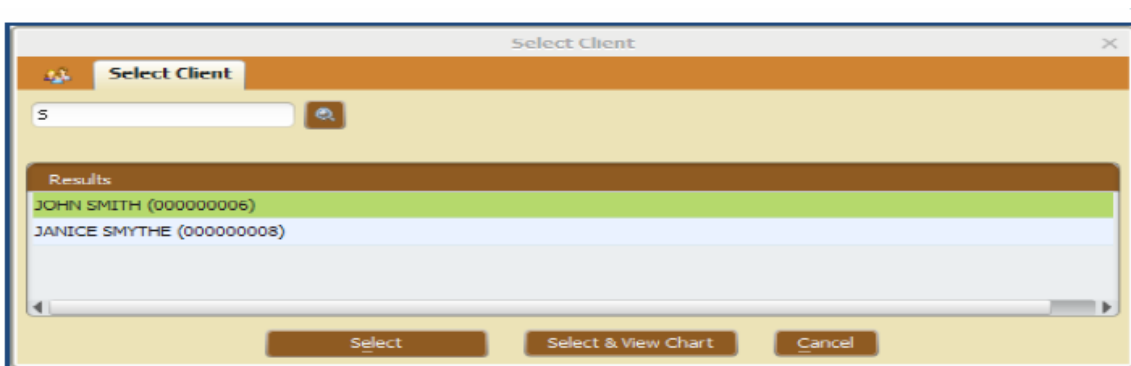
Forms & Data Widget:

The *Forms & Data Widget* provides the ability to display a list of frequently used Forms defined for the User, recently used Forms and the ability to search for Forms.
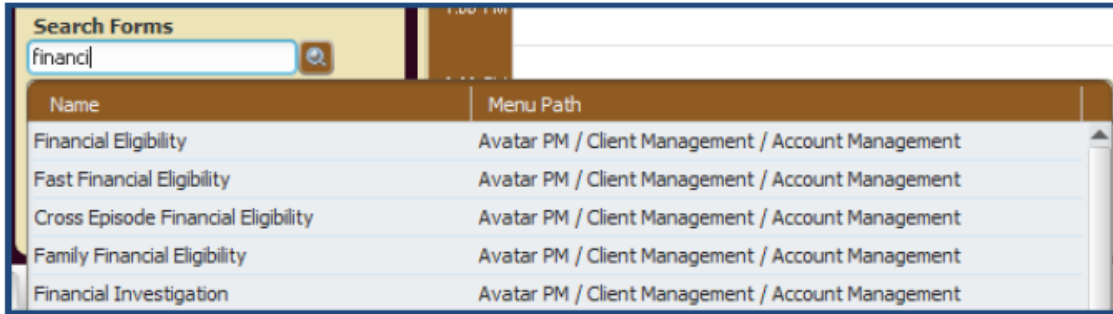
- Opening Multiple Forms: Forms can be accessed at any time within another Form. The icon shown below that appears to the right of the Form name can be used to search for a new Form. If it's a client specific form, a client search field will prompt the User in order to launch a new Form for a new client.
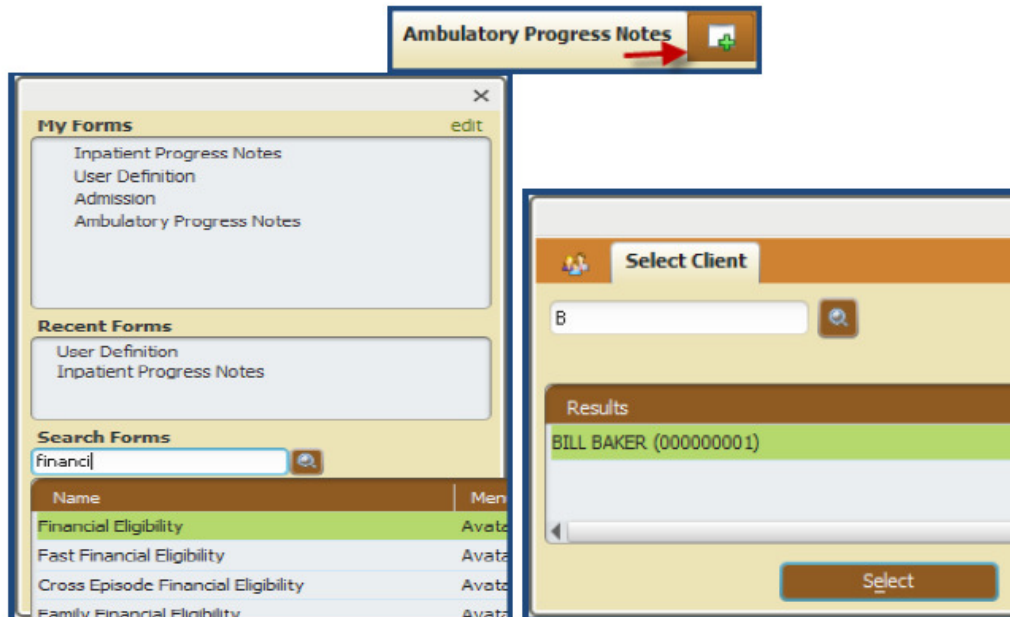

My Forms (Previously My Favorites): will display Forms that are frequently used and are assigned to a User Role. In addition, the User has the ability to add Forms to their My Forms section by selecting 'edit' on the top right of the Widget and search for the Form to add. Users can also drag a Form from the Recent Forms section to the My Forms section

- **Recent Forms**: Displays a list of forms you have accessed in this session. This list will reset after log out.
- **Search Forms:** As you type the form name, the drop down will display the forms meeting the search criteria. You can select the form by double click or by using the arrow keys to move to the desired form and press *Enter* to select.

Name	Menu Path
Financial Eligibility	Avatar PM / Client Management / Account Management
Fast Financial Eligibility	Avatar PM / Client Management / Account Management
Cross Episode Financial Eligibility	Avatar PM / Client Management / Account Management
Family Financial Eligibility	Avatar PM / Client Management / Account Management
Financial Investigation	Avatar PM / Client Management / Account Management

- **Browse Forms:** The regular menu structured can be used within this section. Click on the application you wish to Browse. The menu structure will appear for you to navigate to the correct Form you wish to access. The Forms available are those defined for the User.
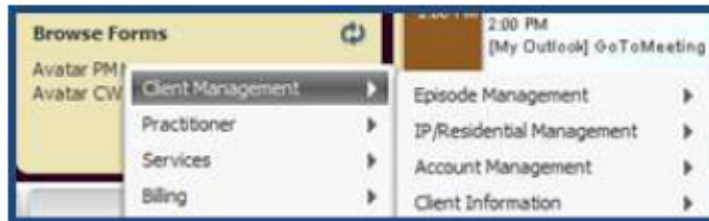
Forms Overview

myAvatar introduces new Form design standards based on Blink's guidelines. These standards should be utilized when educating clients on how to create and implement user defined forms

New Terms:

- Options becomes Forms
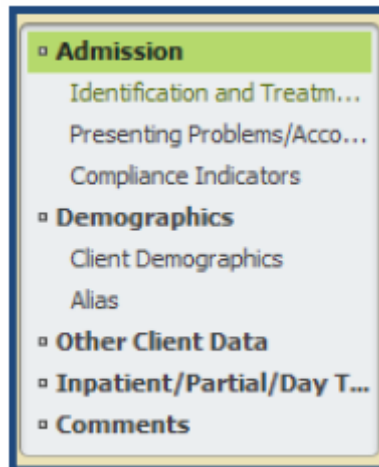- Tabs become Sections
- Pages/Bookmarks become Subsections

Form Layout:

All open Forms for the selected client will appear along the top of the Form
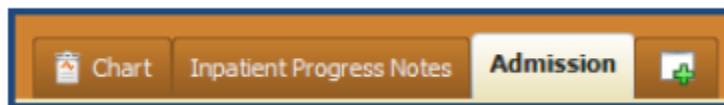
The Sections (Tabs) now appear on the left panel of the Form.

Form Functions also appear on the left panel of the Form. You have the ability to *Submit* the Form, *Stop Entry* of the Form, *Close* all Forms for the selected Client, *Print* Report (enabled if report only), *Add* the Form to your *My Forms* (previously *Favorites)*, Add a *Sticky Note* (only available when editing an existing row of data) and Add the Client to the Users' *My Client's* list.
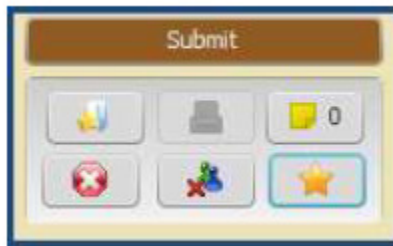
Quick Launch Links- is a link to another Form that can be accessed within a specific Form.
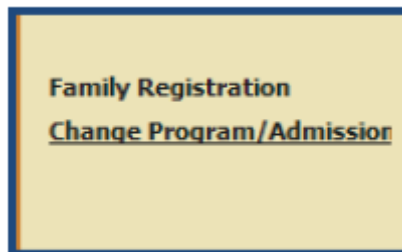
The new Form Layout is a horizontal rather than vertical format. The scrolling bar to the right will allow you to move through all pages of the Form. The Sections will allow you quick access to a specific section.

Undocking/Docking Forms:

Forms can be undocked from its current position. Forms that are eligible to be undocked will have an undock icon in the upper right corner of the Form.

- Click the undock icon and the Form will 'float' over the remaining Widgets. This can be useful for larger Widgets which contain more data than is displayed when they are docked
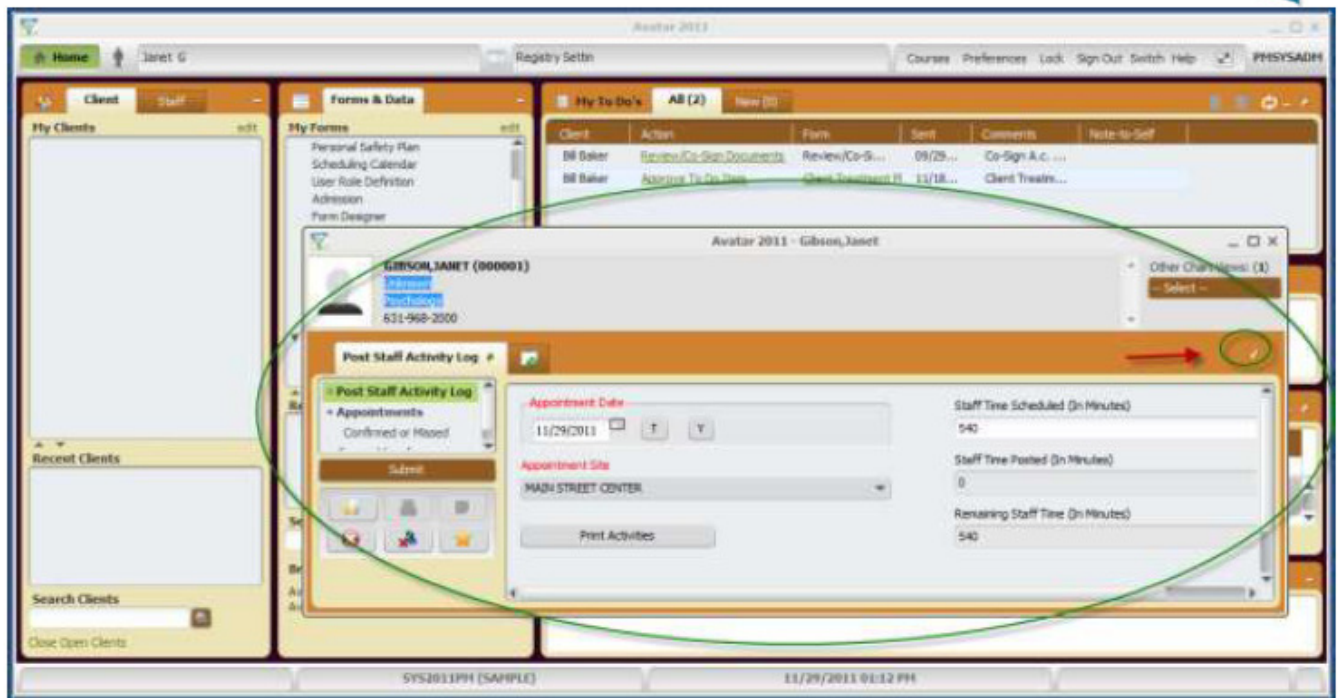
- In order to re-dock the Form, simply click the icon again to return it to its previous position within the application view.

Appointment Scheduling 2011 Module

myAvatar supports the new Appointment Scheduling 2011 Module. This will introduce a new form called Scheduling Calendar, which is a calendar-based interface, similar to the way Microsoft Outlook works. This new Form can be used to manage appointments at multiple sites for staff members, clients and groups, all within one Form. Upon installation of the new Appointment Scheduling 2011 Module, the following Forms are removed from the Scheduling Menu:
- Appointment Scheduling
- Group Appointment Scheduling
- Client Appointment Scheduling

Most setup forms and Clinical Scheduling remains unchanged. The current setup and appointments will transfer over upon installation of the Appointment Scheduling 2011 Module.