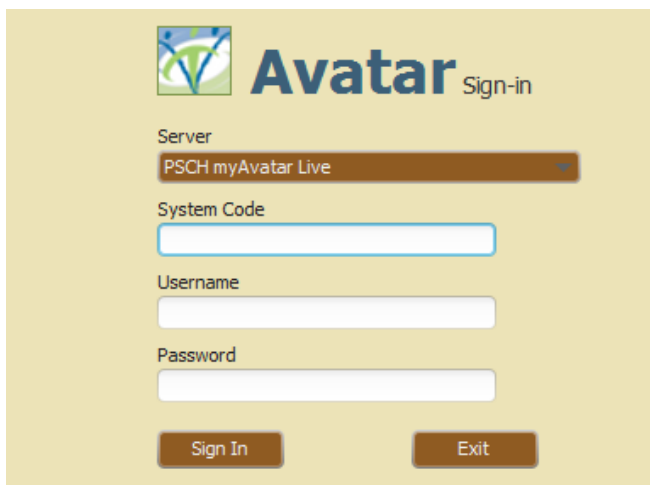


## PSCH myAvatar User Experience Training (Train-the-Trainer)

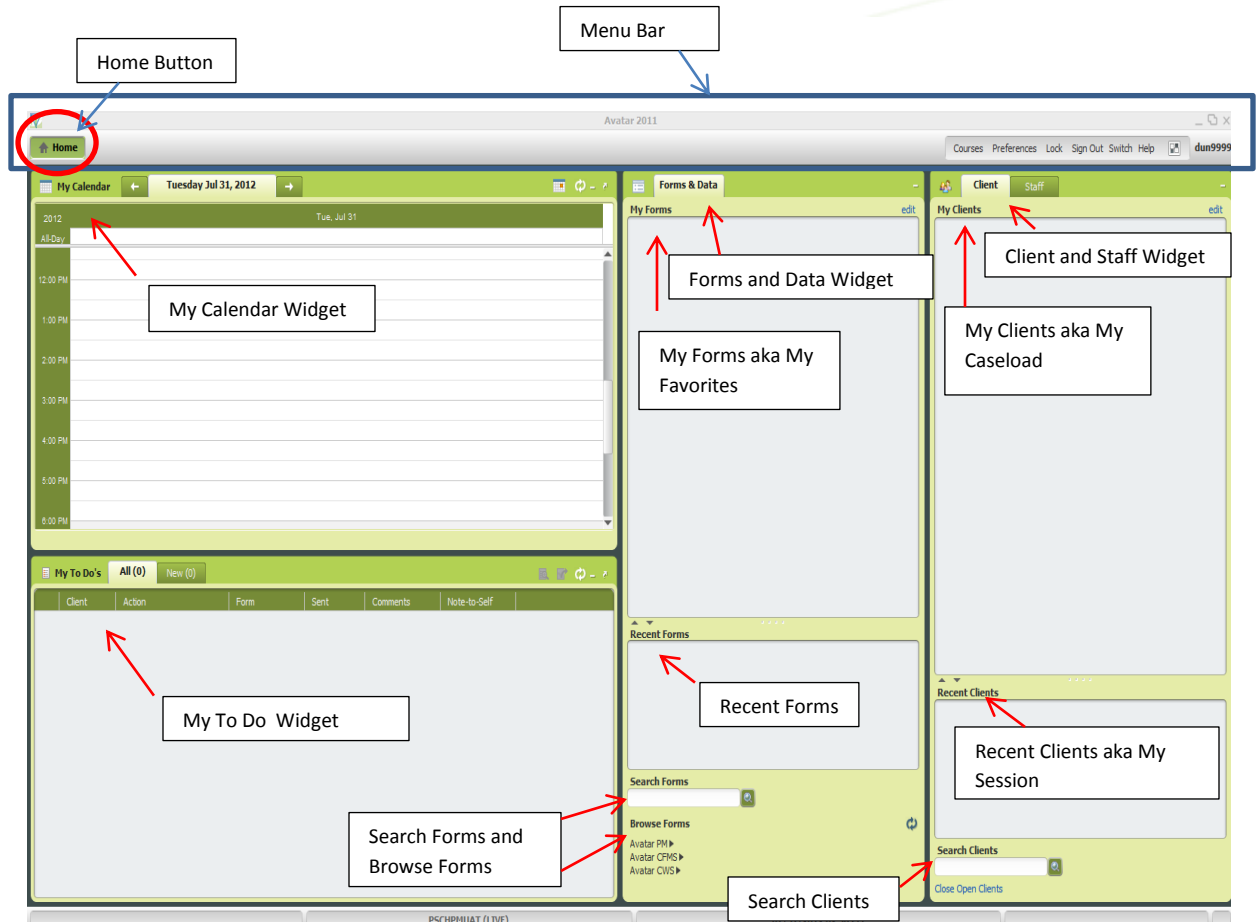
1. Go to the Avatar URL saved in your favorites or navigate to <https://psch.netsmartcloud.com> and it will bring up this screen in an Internet Explorer window. Click **Start Avatar**. A separate screen will come up while Avatar loads. You will then get the sign-in screen.
2. Select the PSCH myAvatar UAT link from the dropdown menu under **Server**. In all caps, enter the System Code **LIVE**, your **User Name and Password**. Then click **Sign In**.



The image shows the Avatar Sign-in screen. At the top left is the Avatar logo, which consists of a green stylized figure with arms raised. To the right of the logo is the word "Avatar" in a large, bold, blue font, and "Sign-in" in a smaller, grey font. Below the logo and title are four input fields: "Server" (a dropdown menu showing "PSCH myAvatar Live"), "System Code" (a text box), "Username" (a text box), and "Password" (a text box). At the bottom are two buttons: "Sign In" and "Exit".

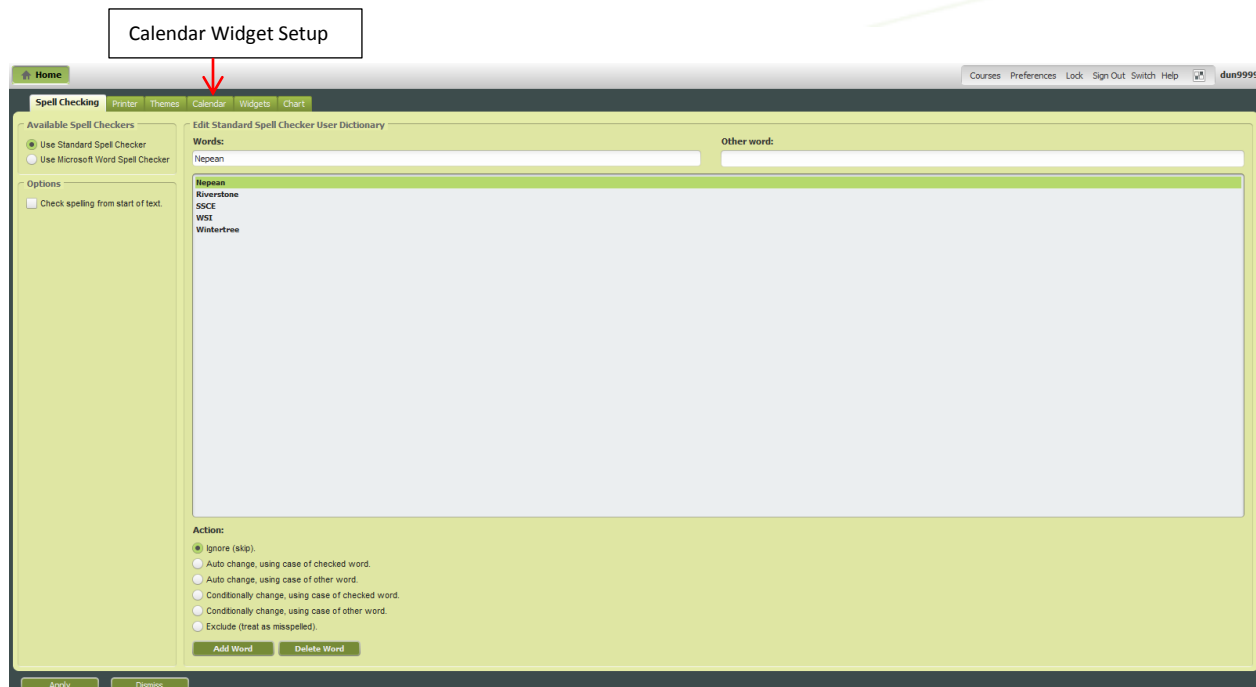
3. This will launch your myAvatar **Home View** (your Home View may be slightly different depending on your User Role). This is a good time to go over some terminology associated with myAvatar:

- a. **Forms**
- b. **Sections**
- c. **Sub-sections**
- d. **My Clients**
- e. **Recent Clients**
- f. **My Forms (Favorite forms)**
- g. **Sticky Notes**
- h. **Chart View** (by double-clicking on a client name)
- i. **Widgets** - a window view of information that make up your **Home and Chart Views** that display information stored in the Avatar system



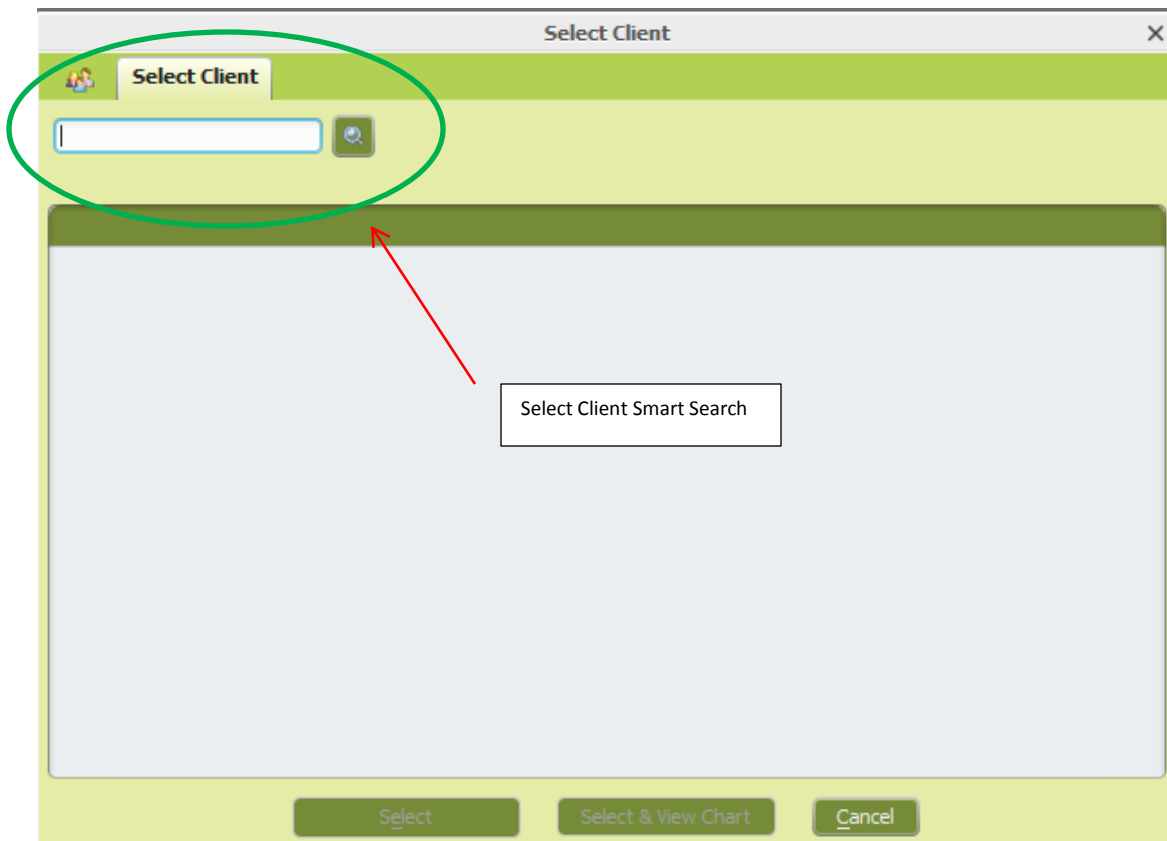
#### 4. Now let's take a closer look at the different areas of the **Home View**:

- a. The **Menu Bar** contains the **Home Button** that will return you to your **Home View** no matter when you are within the system and displays any open **Forms** or **Charts** that you have open. You can have multiple forms and charts open at once and they will all be listed here so you can toggle back and forth between them and the home view without using the windows task bar. The **Menu Bar** also contains your **Preferences** and **Help** menus and displays the **User ID** that is logged in.



- b. Moving on to widgets which make up the **Home View**. Directly from the **Home View** you can move the widgets assigned to the view by dragging and dropping; you can also re-size the widgets using the cursor.
  - i. The icons on the top right corner of most widgets include **refresh**, **minimize/ maximize**, and **undock/ re-dock**.
- c. Every role has the **Forms and Data Widget**. You will use this widget to search for and access forms that you have access to in the system.
  - i. The top section of this form is titled **My Forms**, which, again, replaces your favorites in the previous system. All of your favorites will carry over and display in this section of the widget after the upgrade. In order to edit your **My Forms** click **Edit** at the top right of the widget.
  - i. Also, any form that you access within your session (before you log out) will remain in the **Recent Forms** section. You can drag and drop a form from the **Recent Forms** section into the **My Forms** section and it will remain there after logging out.
  - ii. Next let's look at the **Search Forms** field, which replaces the "Help> Search for option" functionality in the previous system. This is a **Smart Search** field. In this field you can search for a **Form** by typing in the entire name or just part of the name of the form.

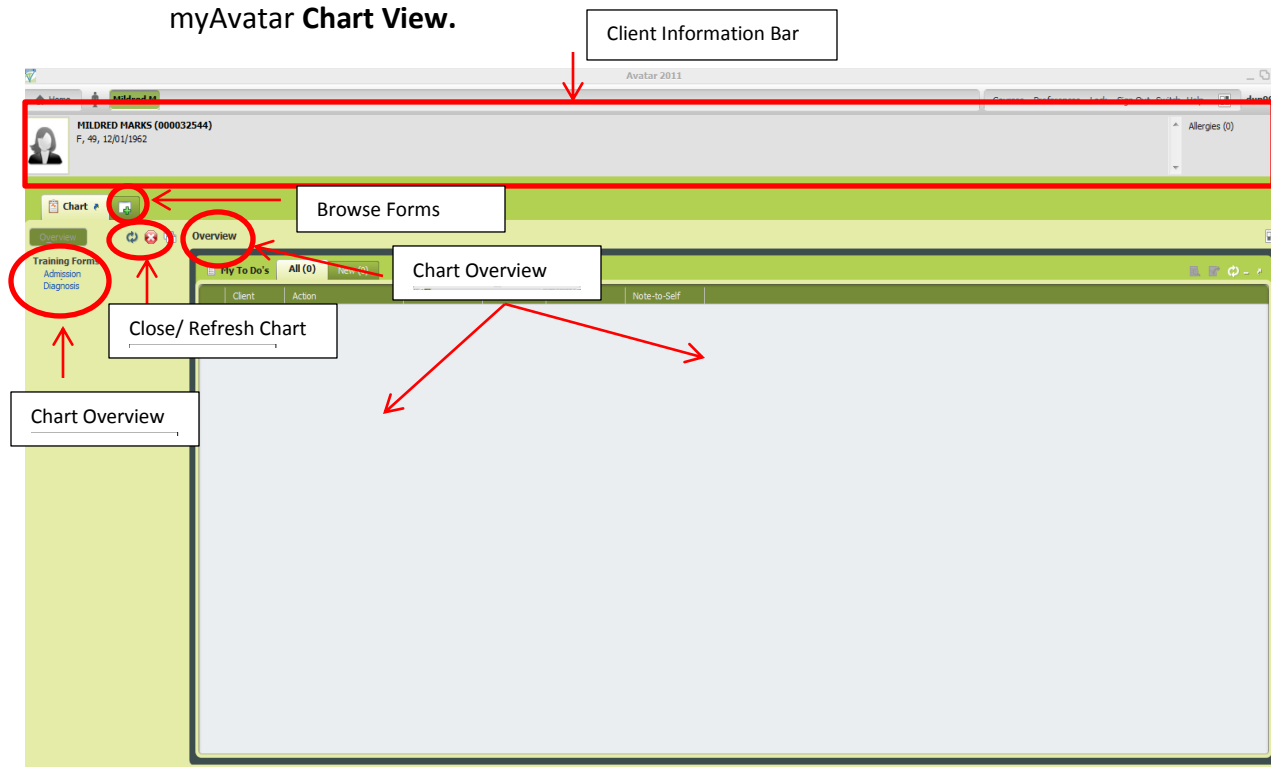
- iii. If you wish, you can also use the **Browse Forms** drop down menu for each product. *Let's search for two different types of forms as a group: a non-client-specific form (ex. User Role Definition).*
- d. Most users will have the **My To-Do Widget**- which will replace the To-Do List in the previous system. Also, many users will have the **My Calendar Widget** (set up in Preferences).
- e. If you search for a client-specific form and do not have a client selected the **Select Client** screen will display. This is also a **Smart Search** field. In this field you can search for: Last Name (or just a portion of it), or Last Name,First Name (or just a portion of the first name), Patient ID #, Date of Birth, Claim Number, etc. Once you select the client and click **Select** the form will open as will the clients chart which is referred to as **Chart View** (notice the client's name in the menu bar).



- f. We just saw one of the ways to access a clients' **Chart**. Going back to the **Home View** let's look at the **Client and Staff Widget**. Again, this is a **Smart Search** field so I enter the client's Last Name to search. To open the clients

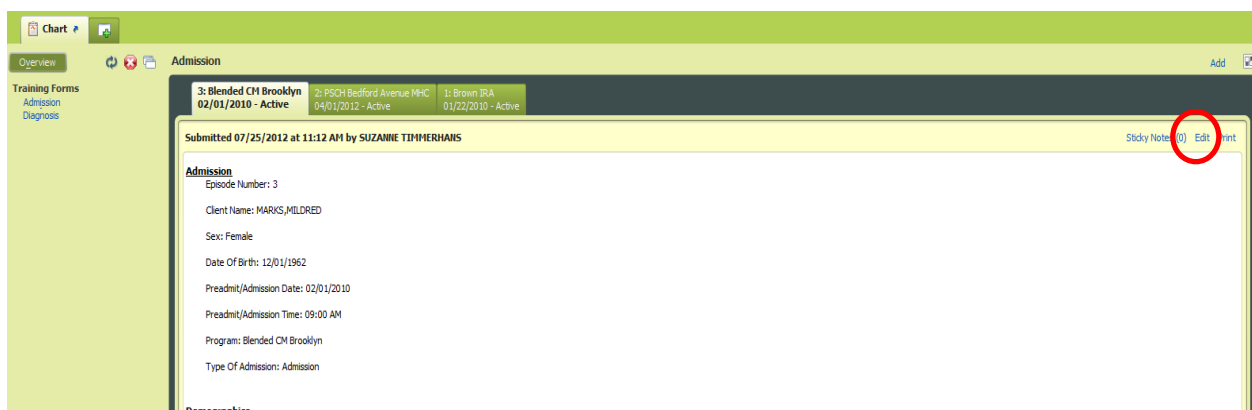
chart you can double click on the client name in the search drop down. Additionally, you can click once on the clients name or use the down arrows to navigate to the client's name and press the enter key. Then the client's name will populate in the **Recent Clients** section and you can double click on the name from there or right click on the name and click **Open Client Chart**. Finally, if the client's name is populated in the **Recent Clients** section, you can make sure it is highlighted and then search for or click on a client-specific form in the **Forms and Data Widget**. *Let's search for a client and open a chart as a group now.*

5. Now that we have opened several client charts let's look at the different areas of the myAvatar **Chart View**.



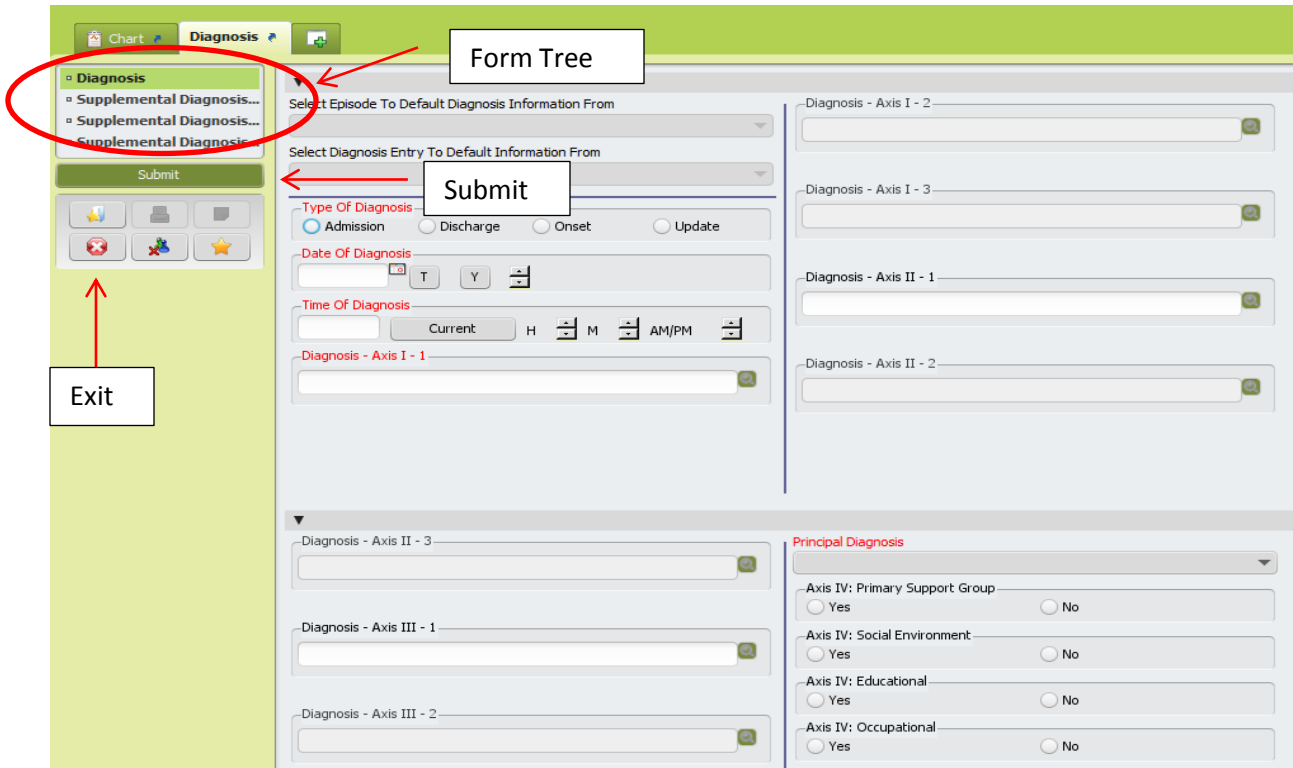
- a. The **Client Information Bar** contains the client's **picture** (if uploaded) and client **demographic information** as well as any **alerts** that were assigned when the patient was admitted and any **allergies** assigned to the client in the **allergies and hypersensitivities** form.
- b. Below that is the **Chart View Overview** which includes all the widgets assigned to your **Chart View**.

- i. As with the **Home View** you can move widgets around the view by dragging and dropping, additionally you can **minimize and maximize widgets, re-size widgets, undock and re-dock widgets** and **refresh** data in widgets.
- ii. To the right of the **Overview** button (which will get you back to the **Chart View Overview** at any point in the client's chart) is the **refresh chart icon** and **close chart icon**.
- c. The **Chart View Form Groups** listed on the left hand side are **User Role** specific and should include the client-specific forms that your role uses most often. If you are able- click the form groups icon to edit these? To access the **Chart View Inquiry** click on one of the forms listed here.
  - i. The **Chart View Inquiry** is a text-display of all the data that has been previously submitted (in both draft and final status) in that specific form for that client. If the form has been submitted more than once for that client the most recent instance will display first and you can scroll down the see older submissions.
  - ii. Directly from **Chart View Inquiry** you can **Add or Edit** data submitted in this form. If you were to click **Add** a blank form will open with certain client information defaulted (because the system knows you're in that particular client's chart). *Let's click Edit and open the Admission form as a group.*



- d. Now you can see how a form and its sections/ sub-sections and fields display in myAvatar.

- i. You can use the **Form Tree** on the left hand side to navigate to sections and subsections within the form. Conversely, you can just scroll up and down to access all subsections of a form; there is no need to look at the top of the screen as there are no pages or tabs. You can also minimize subsections as you move through them.
- ii. Below the **Form Tree** there are several **Form Command Buttons** that replace the large icons at the top of the screen in the previous system. From here you can **Submit**, **Close**, add this form to **My Forms**, create **Sticky Notes**, and close the entire client's chart.



The screenshot displays the Netsmart 'Diagnosis' form. On the left, a 'Form Tree' is visible, listing 'Diagnosis' and 'Supplemental Diagnosis' sections. Below the tree are 'Submit' and 'Exit' buttons. The main form area includes fields for 'Type Of Diagnosis' (Admission, Discharge, Onset, Update), 'Date Of Diagnosis', 'Time Of Diagnosis', and various 'Diagnosis - Axis' fields. A 'Principal Diagnosis' section is located at the bottom right.

- iii. Notice the **zoom** functionality at the bottom right of each form.
- e. To navigate back to the **Chart Inquiry** without submitting or closing the form, click **Chart**. From **Chart View Inquiry** you can click **Overview** to get back to the **Chart View Overview**.
- f. If you wanted to open a form that wasn't listed in your **Chart View Form Groups** click the small green plus sign (browse forms) which will display the **Forms and Data Widget**. Here you can search for a form, use the product drop downs, or click on a form in your **My Forms**. If you close a client-specific



form to open, the system will assume you are going to add a submission of this form. *Let's search for and open the Diagnosis form for this client.*

- i. If the client has more than one episode a list of all client episodes will display. Choose one and the information entered for that episode will default into the form. Once the form is open you can enter data and navigate around the sections/ subsections as we saw before.
- ii. You'll notice that additional data shows in the **Client Information Bar** when in episode-specific forms ex. **episode number, diagnosis, problems, location, and attending/ admitting practitioner.** *Let's now close out of this form and the clients chart, returning back to the Home View.*

**6. Things to highlight when doing your end user training:**

- a. Explain all the different ways to search for and access a client's chart and client-specific forms as well as non-client-specific forms.
- b. Outline the different areas of the home and chart views.
- c. Walk them through the most efficient ways to move throughout the system ex. keyboard shortcuts, tabbing order in forms, using form tree on left hand side to navigate to form sections and sub-sections, using the down/ up arrows to select a form or client in the smart search fields, and the zoom in/out functionality.