

Netsmart Sandbox Tour Guide Script

March

2012

This document is to be used in conjunction with the Netsmart Sandbox environment as a guide. Following the steps included in this guide will allow you to get a sense for the general workflow for your role and how you will interact with the Netsmart solutions, once your own system build is completed. It will provide you with a foundation for understanding the required data collection and making any design decisions associated with the project.



Avatar PM – User Management

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Purpose

The purpose of this exercise is to take you through the user account creation processes available in Avatar. You will:

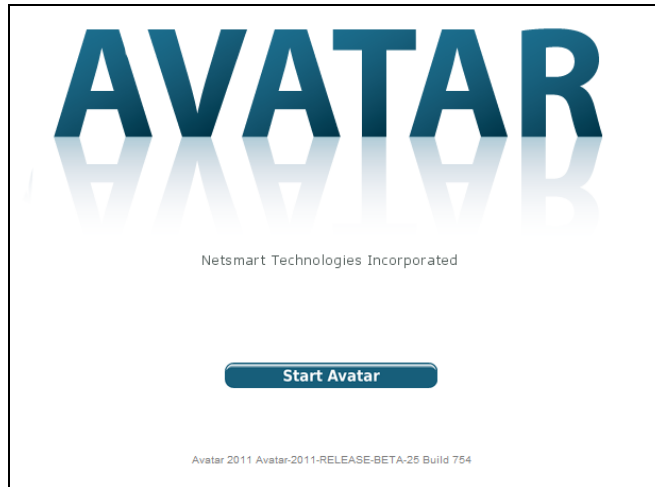
- Log into Avatar
- Create a new User Role
- Create a new User
- Update the User Role
- Change a User's ID
- Change a User's Password
- Merging Users

Terminology

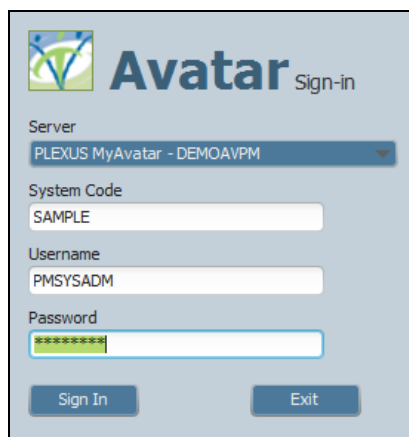
- **Chart View** – view for quick access to the client's stored medical record information. The Chart View is comprised of three main sections:
 - **The Chart Widget View** – like the Home View, displays windows of information pertinent to the client and their overall status.
 - **The Chart Overview** – Located on the left side of the Chart View, the Chart Overview provides links to forms in Avatar pertinent to the user's workflow. This allows the user to quickly navigate to stored data and forms they use in their job on a daily basis for an individual client.
 - **The Chart Inquiry View** – Works in conjunction with the form links in the Chart Overview. When a form link is clicked by a user, the Chart Inquiry view becomes available to the user and they are able to see any stored data on file for the client for that specific form. From the Chart Inquiry View, a user can easily edit an existing record or add a new record.
- **Forms** – the data entry screens in Avatar that are used to track medical record information.
- **Home View** – a user's main navigation screen. The Home View allows a user to view their caseload, search for clients, access forms, or navigate to the client Chart View.
- **Widgets** – windows of information that display information about key Avatar functionality, a client, a program, or your organization.

Logging into Avatar

1. Launch Avatar from the provided URL address.: <https://sandbox.asp.ntst.com/plexus/pm>
2. Click the Start button to launch the application.



3. Log in by selecting the Server you are going to log in.
4. Type "SAMPLE" in the System Code field.
5. Type in an intake Username: TECH1, TECH2, TECH3, TECH4, or TECH5.
6. Type in the Password for the TECH username (they all use the same): TECH99.
7. Click the Sign In button.



The image shows the Avatar Sign-in form. It features the Netsmart logo and the text "Avatar Sign-in". The form includes a dropdown menu for "Server" with "PLEXUS MyAvatar - DEMOAVPM" selected. Below it are input fields for "System Code" (containing "SAMPLE"), "Username" (containing "PMSYSADM"), and "Password" (containing "*****"). At the bottom, there are "Sign In" and "Exit" buttons.

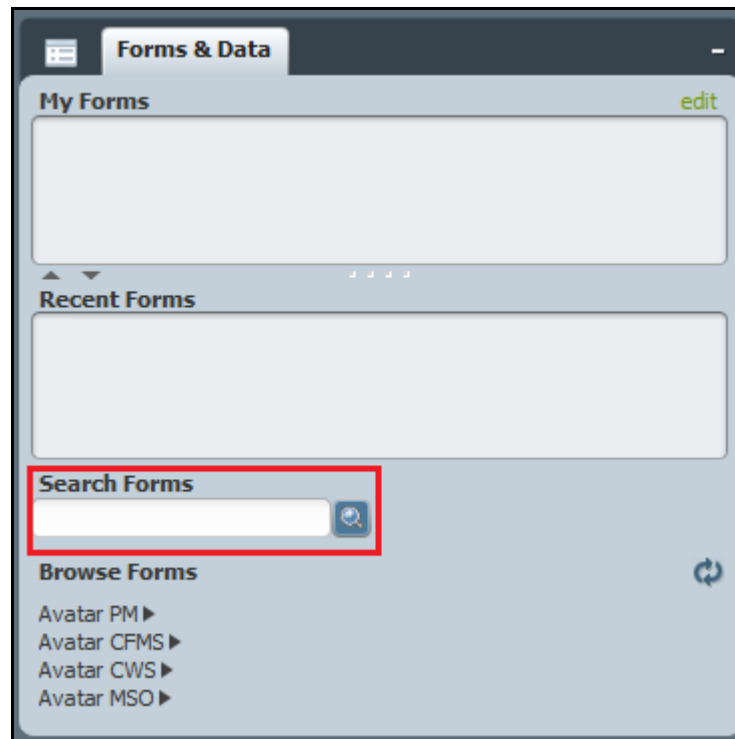
Section Recap:

You have now logged into Avatar.

Create a new User Role

A new User Role allows the grouping and consolidating of users into a “Role” allowing for faster user account creation and the ability to have preset system configuration for users.

1. On the Home View locate the Forms & Data widget and click in the **Search Forms** field.



2. Search for **User Role Definition** and select the User Role Definition form from the drop down by double-clicking on it.

Name	Menu Path
User Role Definition	Avatar PM / RADplus Utilities / System Security / User Maintenance

3. Create the Role ID. It must be alphanumeric with no spaces, as shown below. You can create it using the first letter of your first name followed by your last name, if that has already been used add a number to the end of it.

4. Select all Radio Buttons as shown below.

▼ User Role

User Role ID

User Role Security Level
 Level 1 Level 2 Level 3 Level 4

Allow Access to Avatar Registry Editor
 Yes No

Prevent User Access to Clients not in 'My Caseload'
 Yes No

Allow User to Modify Printer Fonts
 Yes No

Prevent User from Application Logout
 Yes No

User Timeout (In Seconds)

Prompt for Username at Form Entry
 Yes No

User Role for Emergency Access Only
 Yes No

Require Filing Authentication for Applicable Forms
 Yes No

Deactivate User Role
 Deactivate

Allow Product SQL Access
 Yes No

Allow Product SQL Access to Additional Datasets
 Yes No

Product SQL Access Datasets
 BUILD (FACILITY = "97")

Allow Access to Clients with client alert ERROR
 Yes No

Select ERROR Alert Types
 All Alert Types
 Error (Custom)

System Code(s)
 MH (MENTAL HEALTH OP PROGRAMS)
 SA (SUBSTANCE ABUSE OP PROGRAMS)
 SAMPLE (SAMPLE)

Suppress Sending of Alerts To:
 Suppress Sending of Alerts To:
 Organizational E-mail Alerts
 Personal E-mail Alerts
 Popup Message Alerts

▼ Home & Chart View Set Up

Allow User to Customize Views
 Yes No

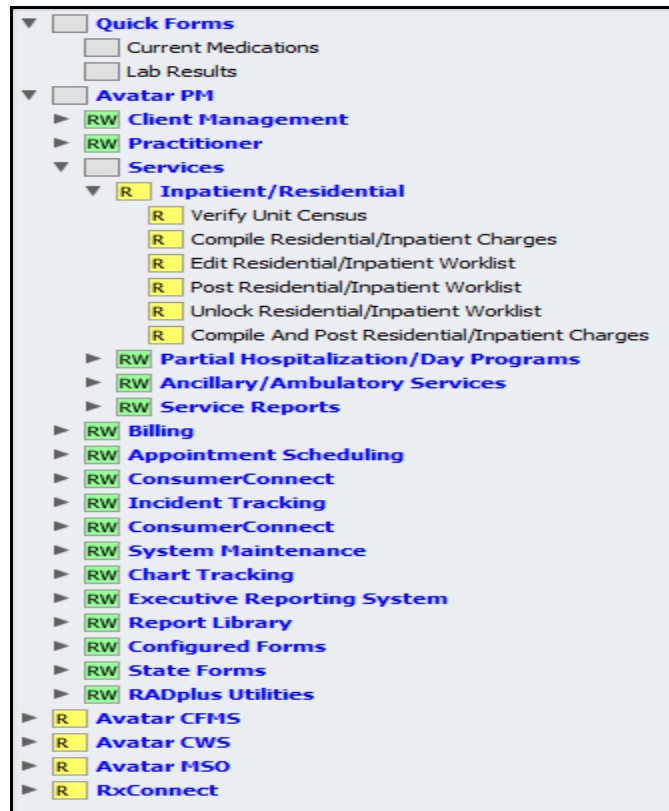
▼

Allow Views on Role
 Yes No

Netsmart Sandbox Tour Guide



5. Allow Access to Clients with client alert ERROR – This determines whether the user can access clients who have been flagged as an emergency precaution.
6. Access to Registry Editor – Important, the registry editor is a configuration tool that should not be provided to all users. Access to it should only be given to your organization’s Avatar Application Administrator.
7. Prompt for username at form entry – Will require username entered before each form that is launched by the user if enabled.
8. Allow Product SQL Access – Access to the SQL Tables, which enables users to run Avatar system reports.
9. Click the “Select Form for User Access” button. Here there are 3 options available. **Make them all Green (RW) and submit.**
10. Grey Box – No Access or a mix of both.
11. Yellow Box (R) – Read-only Access
12. Green Box (RW) – Read/Write Access



13. Document Management

If the users are document management administrators they will have access to view, scan, print and void all forms. If not then specific forms for their access may be selected. **For this exercise, you will not complete this part of the form. Please move to the next section of the form- Workflow Management.**

Is this user a Document Management Administrator? No Yes

Forms Allowed To View

None All Forms

EMR Only EMR and Specify

Specify Forms

Select Forms To View

Forms Allowed To Void

None All Forms

EMR Only EMR and Specify

Specify Forms

Select Forms To Void

Forms Allowed To Scan

None All Forms

EMR Only EMR and Specify

Specify Forms

Select Forms To Scan

View Voided Documents

Yes No

Forms Allowed To Print

None All Forms

EMR Only EMR and Specify

Specify Forms

Select Forms To Print

Select Void Reason Types Allowed To View

Incorrect Client Chart

Poor image, rescan on file

14. Workflow

Here you may determine the workflow notification user lists and requirement user lists. **For this exercise, you will not complete this part of the form. Please move to the next section of the form- Appointment Scheduling.**

Workflow Notification User List(s)

core user list

Workflow Requirement User List(s)

Client Treatment Plan

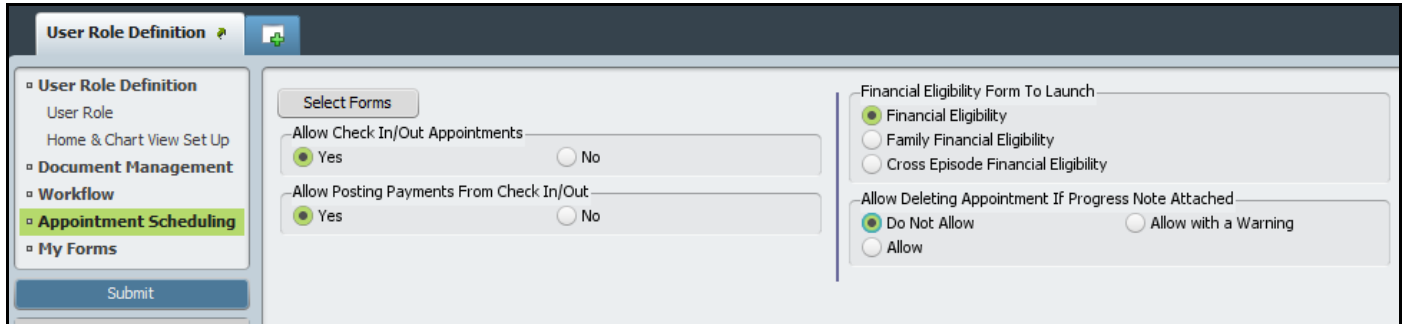
MH Treatment Plan Group

MR Individual Plan Group

Required User List

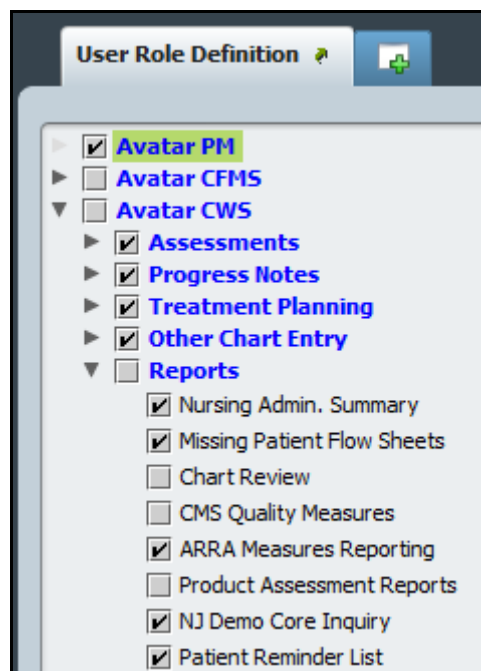
15. Appointment Scheduling

This option allows you to decide whether this User Role has the ability to create, modify, and remove appointments, payments, and work with forms.



The screenshot shows the 'User Role Definition' form. On the left is a navigation menu with 'Appointment Scheduling' selected. The main area has a 'Select Forms' button and two radio button fields: 'Allow Check In/Out Appointments' (Yes selected) and 'Allow Posting Payments From Check In/Out' (Yes selected). On the right, there are two more radio button fields: 'Financial Eligibility Form To Launch' (Financial Eligibility selected) and 'Allow Deleting Appointment If Progress Note Attached' (Do Not Allow selected). A 'Submit' button is at the bottom left.

16. Click the Select Forms button and give access to some of the forms. A max of 15.



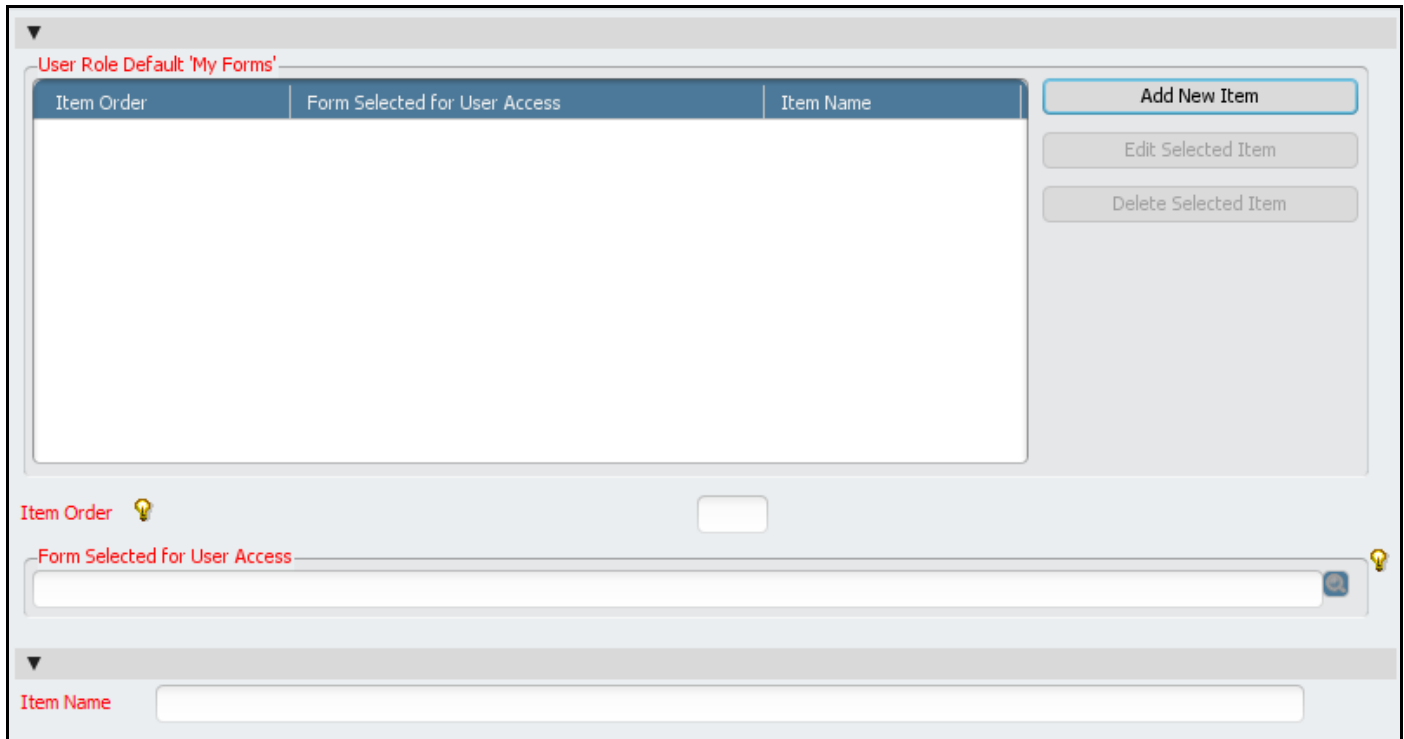
The screenshot shows the 'Select Forms' dropdown menu. It lists various forms with checkboxes: Avatar PM (checked), Avatar CFMS (unchecked), Avatar CWS (unchecked), Assessments (checked), Progress Notes (checked), Treatment Planning (checked), Other Chart Entry (checked), and Reports (unchecked). Under Reports, there are several sub-items: Nursing Admin. Summary (checked), Missing Patient Flow Sheets (checked), Chart Review (unchecked), CMS Quality Measures (unchecked), ARRA Measures Reporting (checked), Product Assessment Reports (unchecked), NJ Demo Core Inquiry (checked), and Patient Reminder List (checked).

17. Select the **Yes** radio buttons for the “Allow Check In/Out” and “Posting Payments” fields.

18. Select the **Financial Eligibility** radio button in that field.

19. Select the **Do Not Allow** radio button in its field.

20. My Forms



Item Order	Form Selected for User Access	Item Name
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Item Order

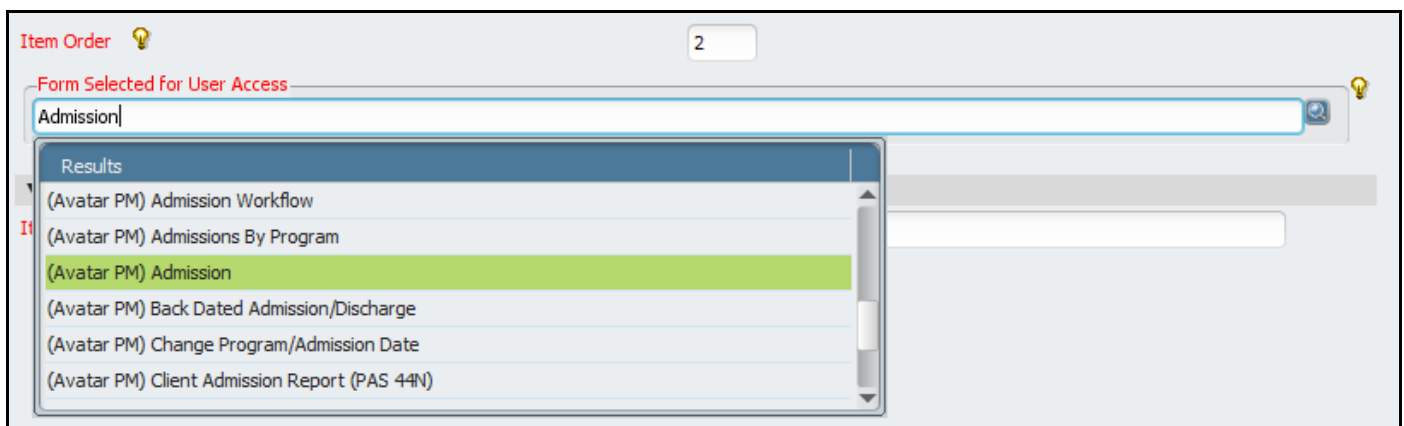
Form Selected for User Access

Item Name

21. On this form you may create the default forms that show up under the User Role's "My Forms."

22. Click the Add New Item button to add a new form.

23. Type "Admission" into the "Form Selected for User Access" field. Scroll down and select the Admission form.

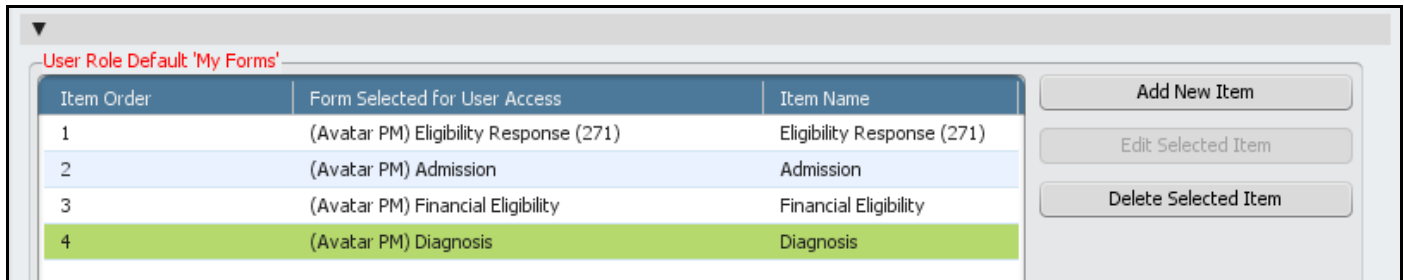


Item Order

Form Selected for User Access

- Results
- (Avatar PM) Admission Workflow
- (Avatar PM) Admissions By Program
- (Avatar PM) Admission
- (Avatar PM) Back Dated Admission/Discharge
- (Avatar PM) Change Program/Admission Date
- (Avatar PM) Client Admission Report (PAS 44N)

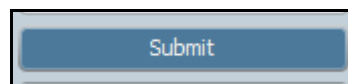
24. Select **Add New Item** again and repeat this function for the Financial Eligibility and Diagnosis forms. When complete, it should look like this.



The screenshot shows a web interface for configuring a user role. At the top left, it says "User Role Default 'My Forms'". Below this is a table with three columns: "Item Order", "Form Selected for User Access", and "Item Name". The table contains four rows of data. To the right of the table are three buttons: "Add New Item", "Edit Selected Item", and "Delete Selected Item".

Item Order	Form Selected for User Access	Item Name
1	(Avatar PM) Eligibility Response (271)	Eligibility Response (271)
2	(Avatar PM) Admission	Admission
3	(Avatar PM) Financial Eligibility	Financial Eligibility
4	(Avatar PM) Diagnosis	Diagnosis

25. When you are finished click the Submit button.



26. You may now begin assigning users to the User Role through the User Definition form.

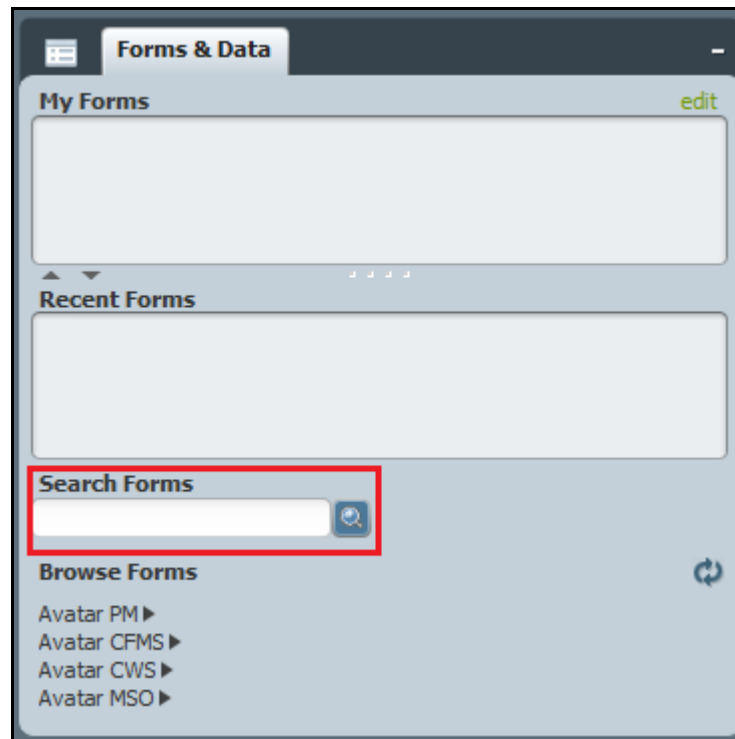
Section Recap:

- ✓ You have now created a new User Role which you will be able to apply to users in the system.

Create a new User

Creating a new user is necessary to allow an employee of your organization access the system. They may either be an independent user or part of a User Role, which will change your input options.

1. On the Home View locate the Forms & Data widget and click in the **Search Forms** field.

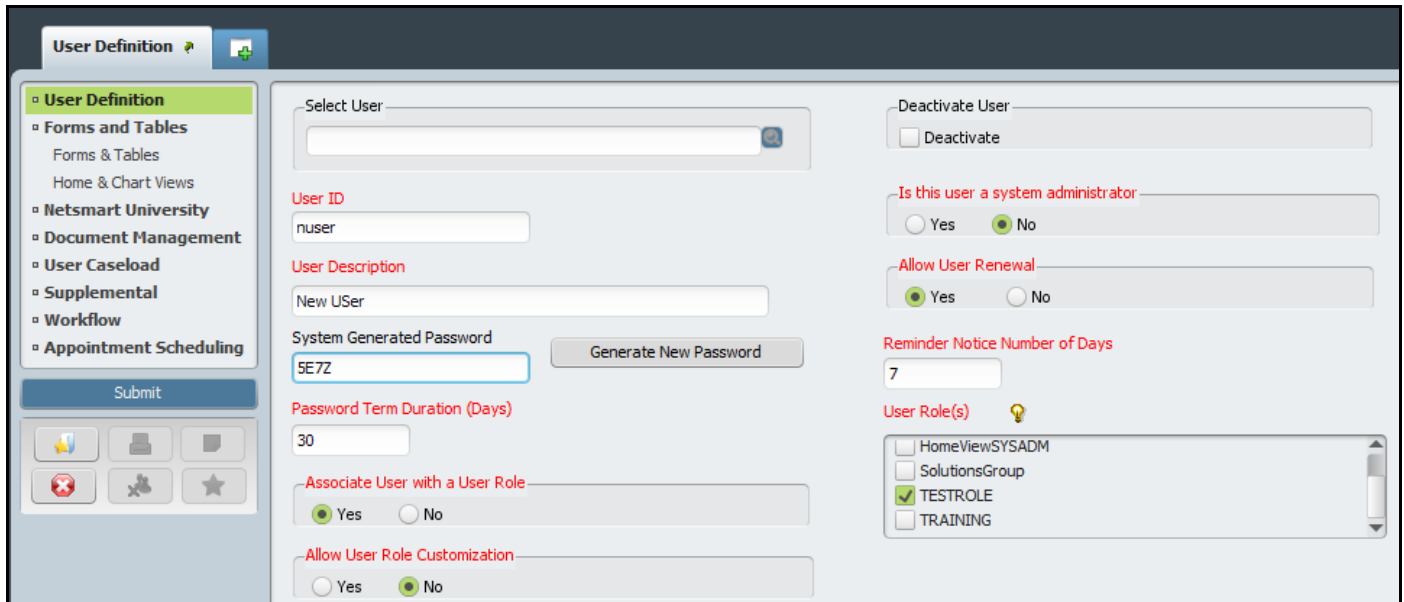


2. Search for **User Definition** and select the form in the drop down by double clicking on it using your mouse.

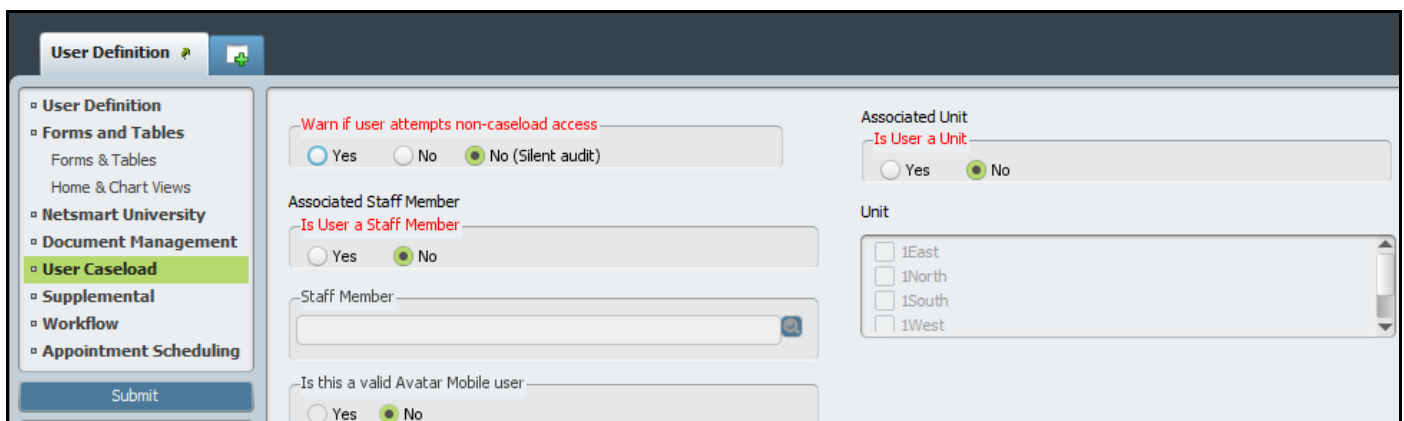
Name	Menu Path
ConsumerConnect User Definition	Avatar PM / ConsumerConnect / ConsumerConnect System Mainte...
User Definition	Avatar PM / RADplus Utilities / System Security / User Maintenance
Order Entry User Definition	Avatar CWS / Order Entry / Order Entry System Security

3. Type a new user ID into the "User ID" box and it will generate a random password for their first login.
4. Write down the username and the system generated password you've created.
5. In User Description type the name or description of the user.
6. Select **Yes** in the Associate User with a User Role field. Select a User Role, the one you just created would work.
7. Password Term Duration is how long a password is active until it must be changed; the reminder notice number of days lets you know before a change is necessary. **Leave this at 30.**

8. You may make a user a System Administrator here, as well as associate them with a User Role if that is deemed necessary. **Select No.** Set Allow User Renewal to **Yes**.
9. Allow User Role Customization may allow a user to customize outside of the set rules. **Select No.**

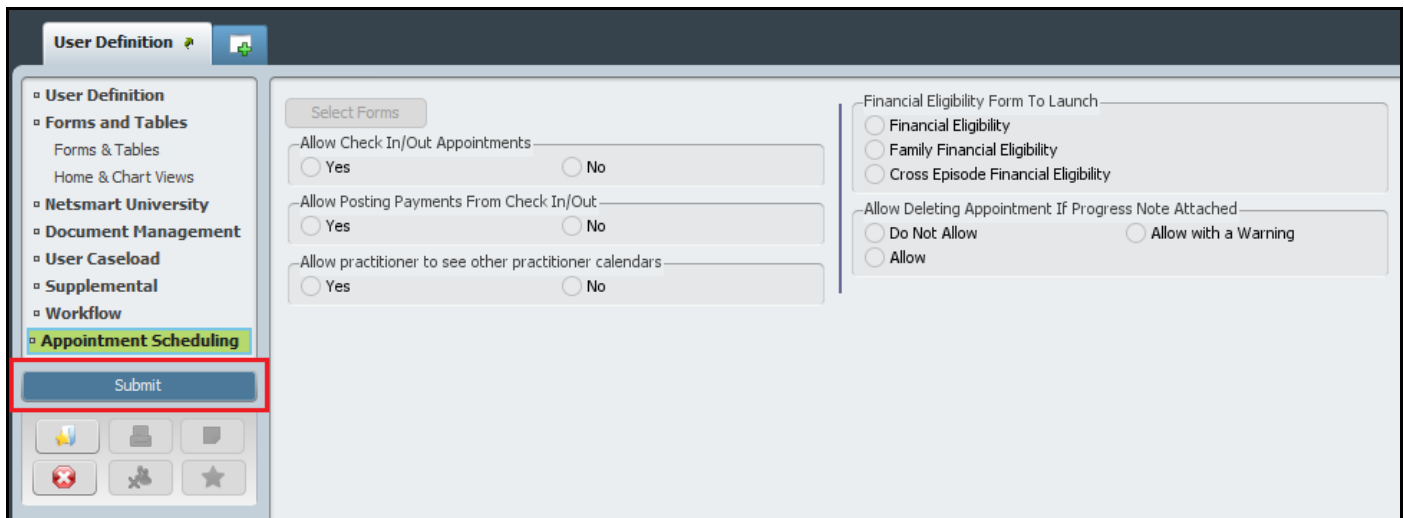


10. The Forms & Tables field will be disabled if you select a user role. If a user role has not been selected this field will need to be filled in to determine their access levels.
11. If your organization has purchased the use of Netsmart University courses, the Netsmart University section allows you to link your employees to specific Netsmart University courses through Avatar.
12. The Document Management field will be disabled if you select a user role. If a user role has not been selected this field will need to be filled in to determine their status in relation to the document management system.
13. User Caseload Field



14. The “Warn if user attempts non-caseload access” option determines whether a message will appear for the user whenever they attempt to access something outside of their caseload. There are 3 options. **Select No.**
15. Yes – Will warn them.
16. No – Will not warn them.

17. No (Silent Audit) – Will not warn the user but will keep a log whenever they access a client that is not in their caseload.
18. You may also determine whether a User is a “Staff Member” or if they are a “Unit” in the system, as well as whether they are a valid Avatar Mobile user. For all of these... **Select No.**
19. The Supplemental field contains basic demographic user information. You may leave this alone for now.
20. The Workflow field will be disabled if you select a user role. If a user role has not been selected this field will need to be filled in to determine their workflow.
21. The Appointment Scheduling field will be disabled if you select a user role. If a user role has not been selected this field will need to be filled in to determine their appointment scheduling.
22. When you are finished, click the Submit button under the form tree on the left side of the screen.

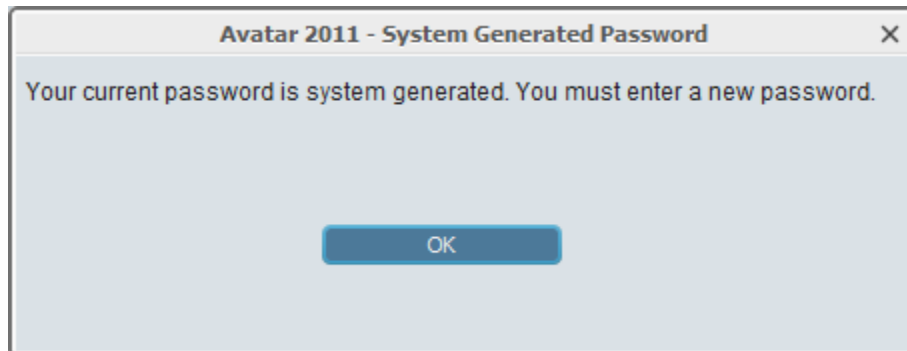


23. Sign out of Avatar by clicking “Sign Out” in the menu bar on the top-right of the screen.

24. Sign back into Avatar using your newly created user and password.



25. A window will appear informing you a password change is needed. Click **OK**.



26. Enter your new password and click **OK**.

A screenshot of a dialog box titled "Avatar 2011 - New password entry". The dialog box has a light blue background and a dark blue border. It contains two text input fields, each with "*****" as a placeholder, and a blue "OK" button at the bottom. The first input field is labeled "Enter New Password" and the second is labeled "Re-Enter New Password".

Avatar 2011 - New password entry

Enter New Password

Re-Enter New Password

OK

27. You are now logged in as your new user!

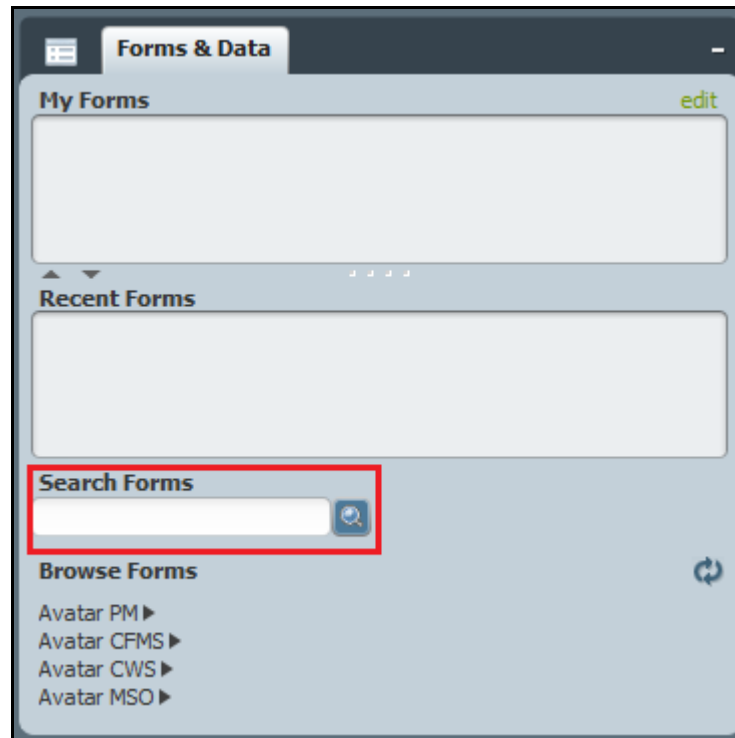
Section Recap:

- ✓ You have now created a new User Role which you will be able to apply to users in the system.
- ✓ You have also created a new User, applied a User Role to them, and logged into the system with them.

Update User Role

This form allows any administrative user update any user roles. Through this form it is possible to grant access to new forms or security levels among other functions.

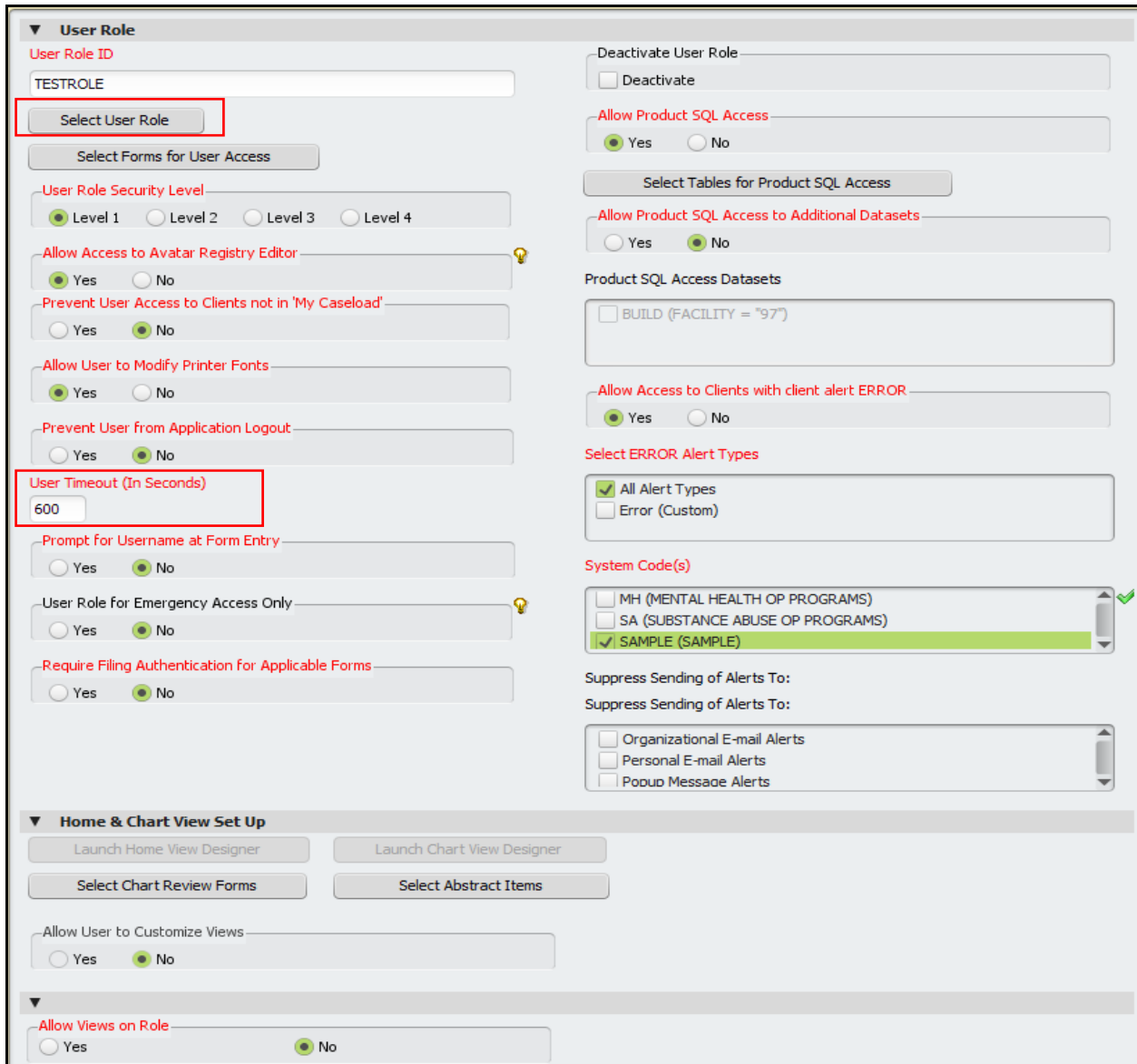
1. On the Home View locate the Forms & Data widget and click in the **Search Forms** field.



2. Search for **User Role Definition** by typing in the 'User Role Definition'. Double click on the form name in the drop down.

Name	Menu Path
User Role Definition	Avatar PM / RADplus Utilities / System Security / User Maintenance

- Click the **Select User Role** button. From the drop down, select your user role to edit. Once your user role is selected you may modify its rules.



User Role

User Role ID: TESTROLE

Select User Role

Select Forms for User Access

User Role Security Level: Level 1

Allow Access to Avatar Registry Editor: Yes

Prevent User Access to Clients not in 'My Caseload': No

Allow User to Modify Printer Fonts: Yes

Prevent User from Application Logout: No

User Timeout (In Seconds): 600

Prompt for Username at Form Entry: No

User Role for Emergency Access Only: No

Require Filing Authentication for Applicable Forms: No

Deactivate User Role: Deactivate

Allow Product SQL Access: Yes

Select Tables for Product SQL Access

Allow Product SQL Access to Additional Datasets: No

Product SQL Access Datasets: BUILD (FACILITY = "97")

Allow Access to Clients with client alert ERROR: Yes

Select ERROR Alert Types: All Alert Types

System Code(s): SAMPLE (SAMPLE)

Suppress Sending of Alerts To: Organizational E-mail Alerts, Personal E-mail Alerts, Popup Message Alerts

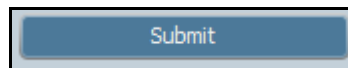
Home & Chart View Set Up

Launch Home View Designer, Launch Chart View Designer, Select Chart Review Forms, Select Abstract Items

Allow User to Customize Views: No

Allow Views on Role: No

- Change the "User Timeout" field to 600. Then click **Submit**.



- Changes will take effect immediately. If a user's form permissions have been updated, have the user click on the refresh icon on the Forms and Data widget to see the updated forms (or for the forms to be removed) from their form menu structure.

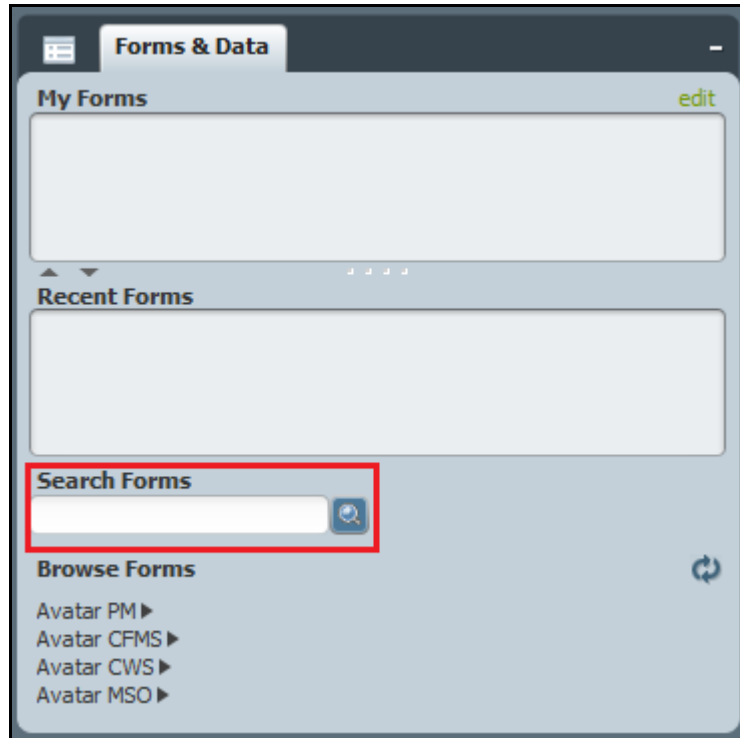
Section Recap:

- ✓ You have now created a new User Role which you will be able to apply to users in the system.
- ✓ You have also created a new User, applied a User Role to them, and logged into the system with them.
- ✓ You have then gone back into the User Role and applied changes to it.

Change User ID

If the User ID originally created needs to be changed it can with the Change User ID option. However, once this is done the previous User ID is no longer useable.

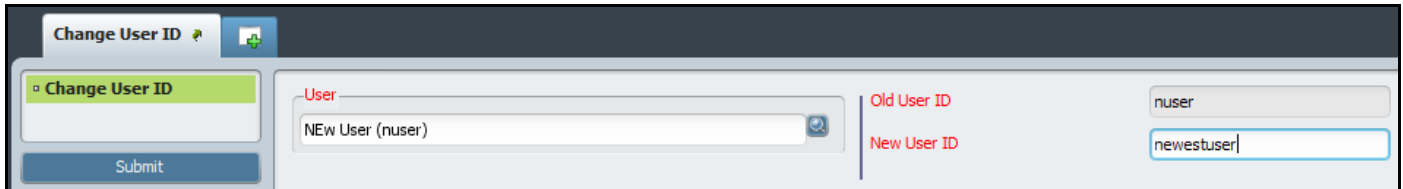
1. On the Home Screen locate the Forms & Data widget and click in the **Search Forms** field.



2. Search for **Change User ID** and select.

Name	Menu Path
Change User ID	Avatar PM / RADplus Utilities / System Security / User Maintenance
Change User ID File Import	Avatar PM / RADplus Utilities / System Security / User Maintenance

3. Select the user whose ID you want to change. Type in the new user ID and click submit.



The screenshot shows a web interface for changing a user ID. At the top left, there is a tab labeled 'Change User ID' with a green plus icon. Below the tab is a green button labeled 'Change User ID'. To the right of the button is a 'Submit' button. The main form area is divided into two sections. The left section is labeled '-User' and contains a text input field with the value 'NEw User (nuser)'. The right section is labeled 'Old User ID' and 'New User ID'. The 'Old User ID' field contains the value 'nuser'. The 'New User ID' field contains the value 'newestuser'.

4. Once this is done the previous user ID will be deactivated, but kept in the system. It will no longer be useable.

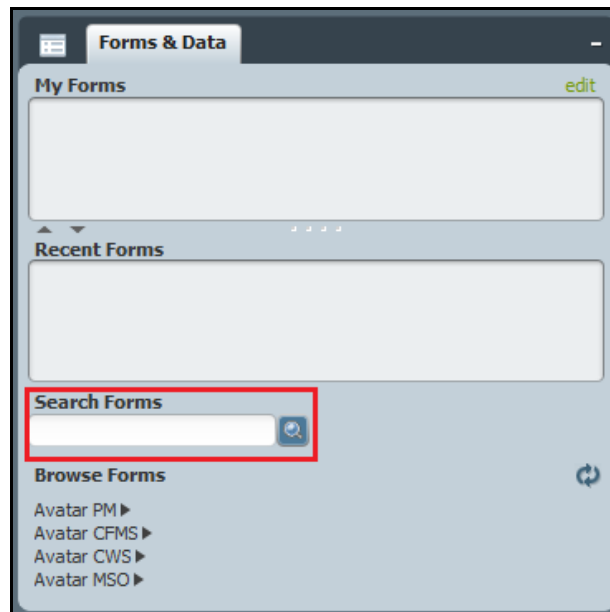
Section Recap:

- ✓ You created a new User Role which you will be able to apply to users in the system.
- ✓ You have also created a new User, applied a User Role to them, and logged into the system with them.
- ✓ You then went back into the User Role, modified it, and then applied changes to it.
- ✓ Then, you changed the User's ID you created to a new ID.

Change Password

Using the Change Password form you can update your password through one easy process.

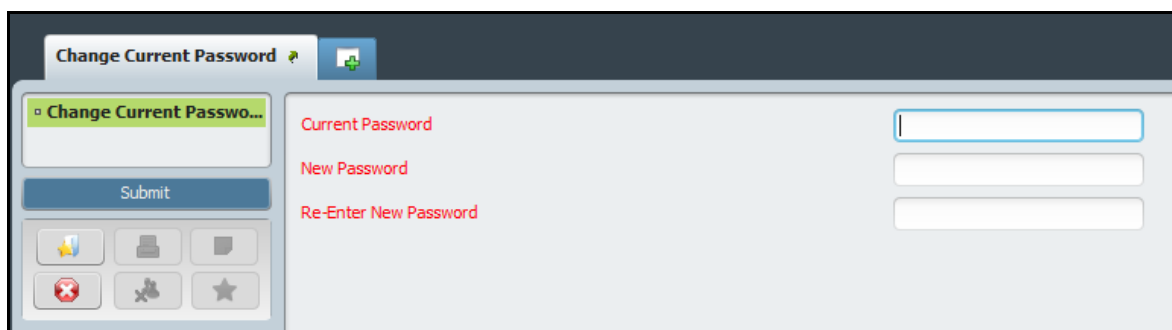
1. On the Home Screen locate the Forms & Data widget and click in the **Search Forms** field.



2. Search for **Change Current Password** and select.

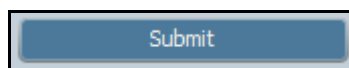
Name	Menu Path
Change Current Password	Avatar PM / RADplus Utilities / System Security / User Maintenance

3. The **Change Current Password** screen will open.



The screenshot shows the 'Change Current Password' form. It features a title bar, a search bar, a 'Submit' button, and a list of icons. The main form area contains three input fields: 'Current Password', 'New Password', and 'Re-Enter New Password'.

4. Enter your current password and then type in your new password twice for verification and click **Submit**.



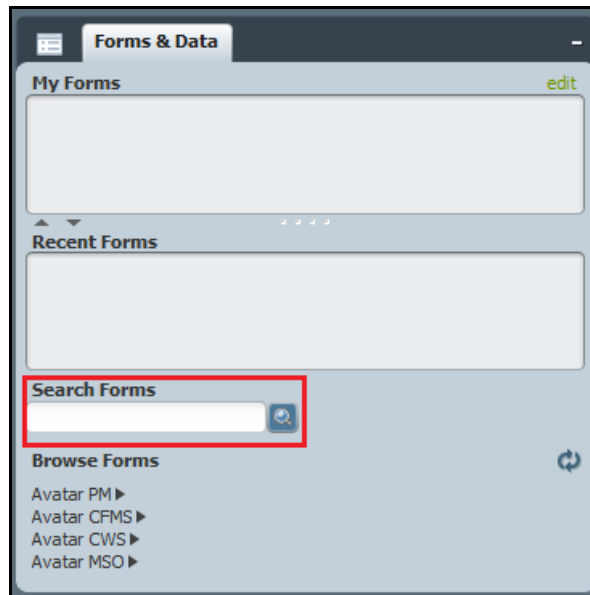
Section Recap:

- ✓ You created a new User Role which you will be able to apply to users in the system.
- ✓ You have also created a new User, applied a User Role to them, and logged into the system with them.
- ✓ You then went back into the User Role, modified it, and then applied changes to it.
- ✓ Then, you changed the User's ID you created to a new ID.
- ✓ Next, you have updated and saved them a new password.

User Merge

The user merge is used when a user has been put into the system multiple times and needs to be consolidated into one user.

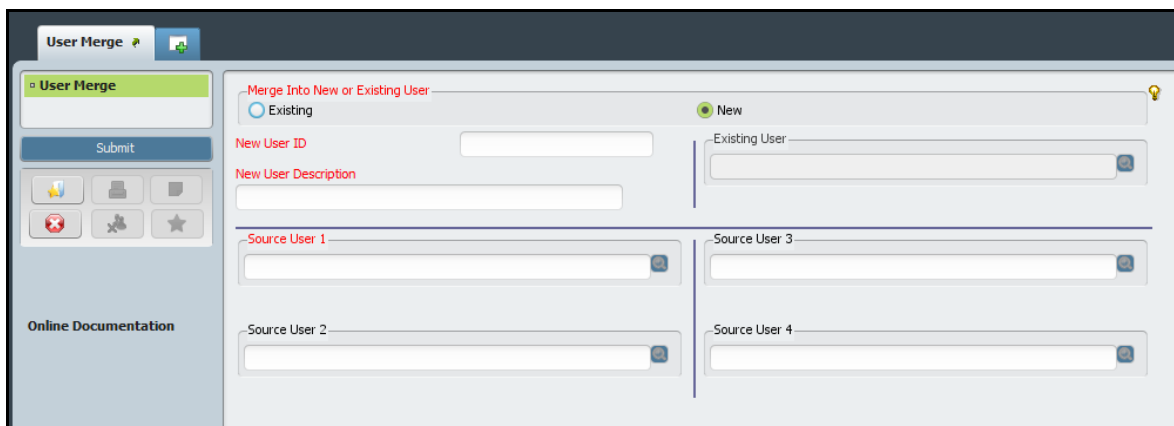
1. On the Home Screen locate the Forms & Data widget and click in the **Search Forms** field.



2. Search for **User Merge** and select.

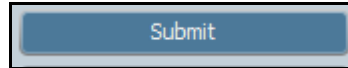
Name	Menu Path
User Merge	Avatar PM / RADplus Utilities / System Security / User Maintenance
User Merge File Import	Avatar PM / RADplus Utilities / System Security / User Maintenance

3. The User Merge screen will open.



4. There are 2 options for merging profiles. Merge into a new or existing user.

5. A **new** user will terminate both of the profiles of those being merged into a new profile. When this is selected you must create a new user along with User ID and Description.
6. An **existing** user will terminate one of the profiles them while merging into the other profile. When this is selected you must choose a user to be merged into.
7. After that has been decided select the users (source users) to merge. Remember, the source users will not exist after the merger.
8. Click the Submit button.



Section Recap:

- ✓ You created a new User Role which you will be able to apply to users in the system.
- ✓ You have also created a new User, applied a User Role to them, and logged into the system with them.
- ✓ You then went back into the User Role, modified it, and then applied changes to it.
- ✓ Then, you changed the User's ID you created to a new ID.
- ✓ Next, you have updated and saved them a new password.
- ✓ Finally, you have taken multiple instances of a user and merged them into one User File.

