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.

Netsmart Sandbox Tour Guide

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

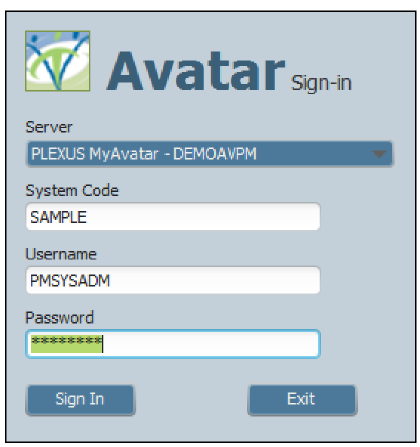
Terminology

- **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.



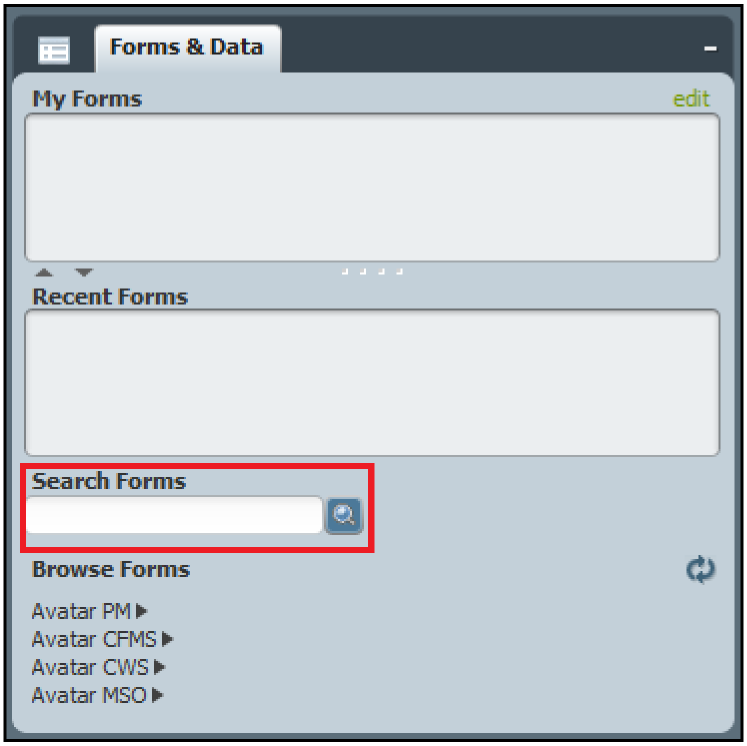
Section Recap:

You have now logged into Avatar.

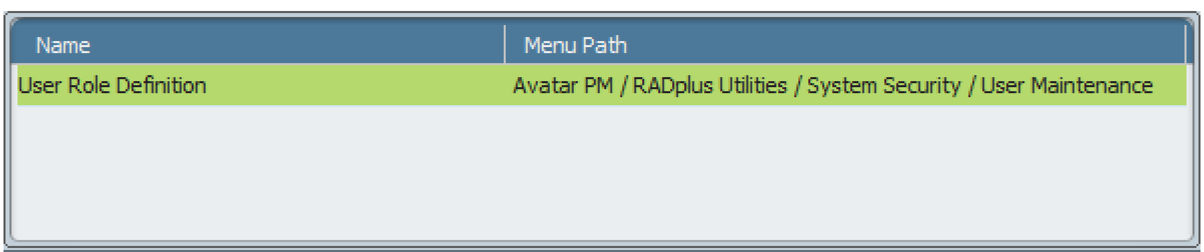
Create a new User Role

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.

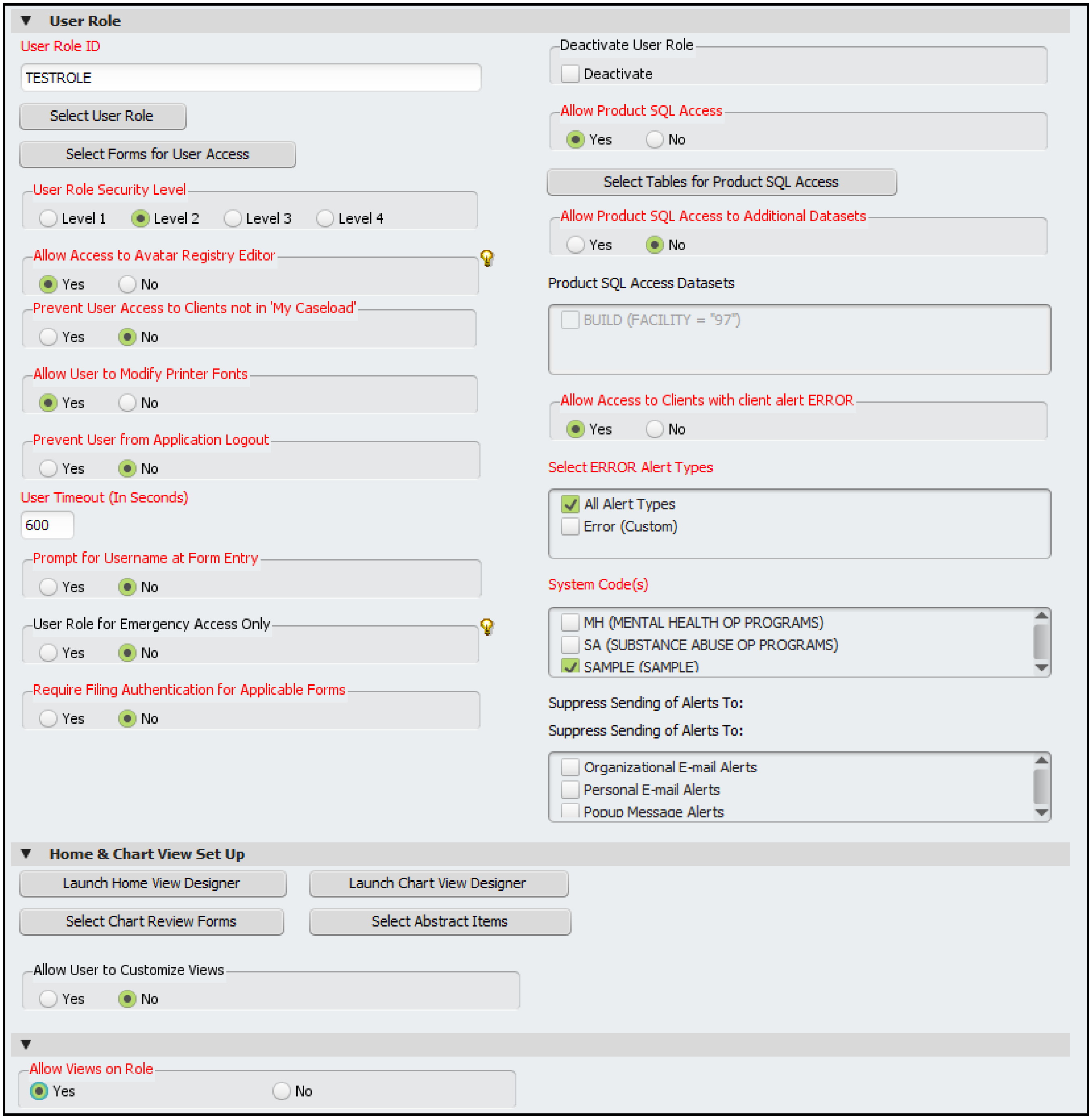


2. Search for **User Role Definition** and select the User Role Definition form from the drop down by double-clicking on it.

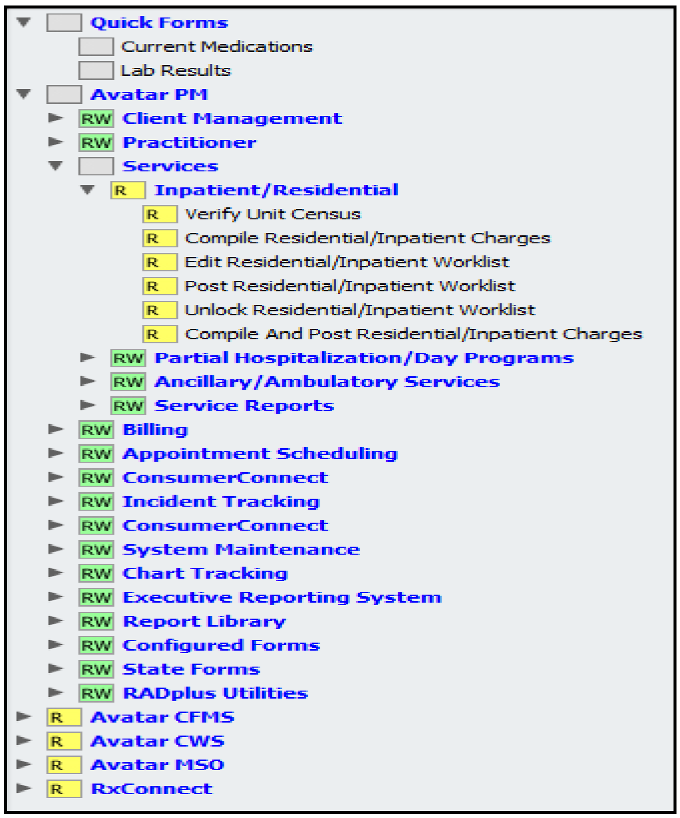


3. Create the Role ID. It must be alphanumeric with no spaces, as shown below. You can create it using the first letter of your first name followed by your last name, if that has already been used add a number to the end of it.

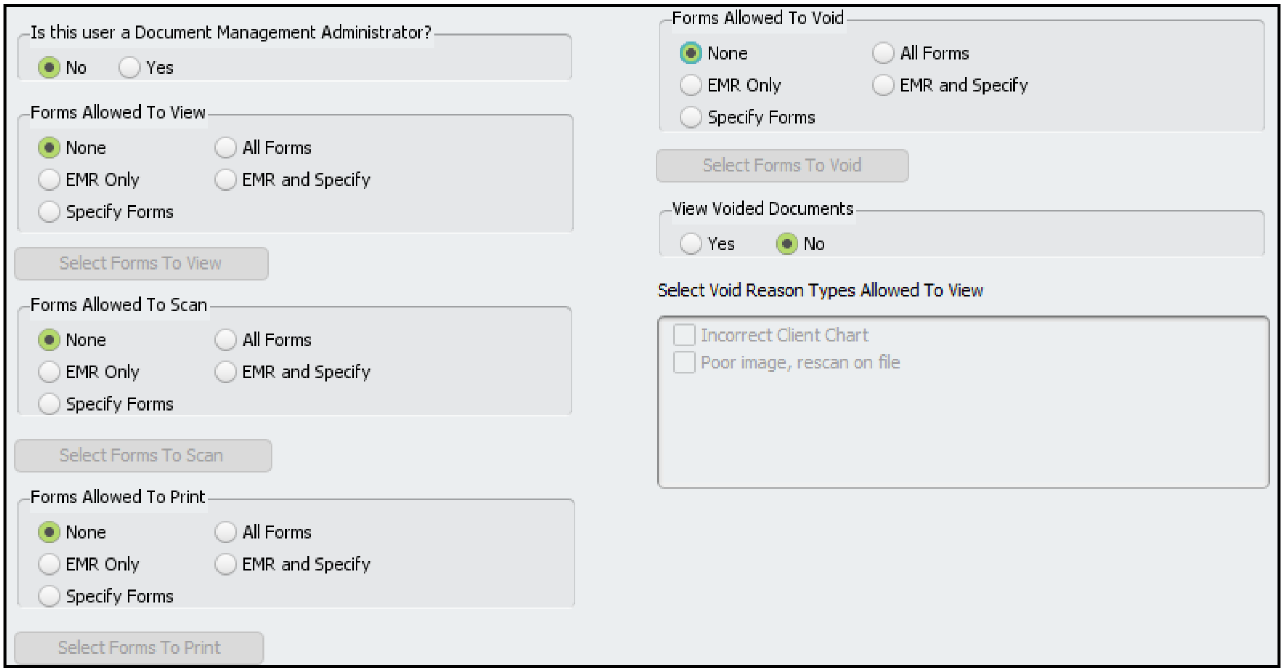
4. Select all Radio Buttons as shown below.



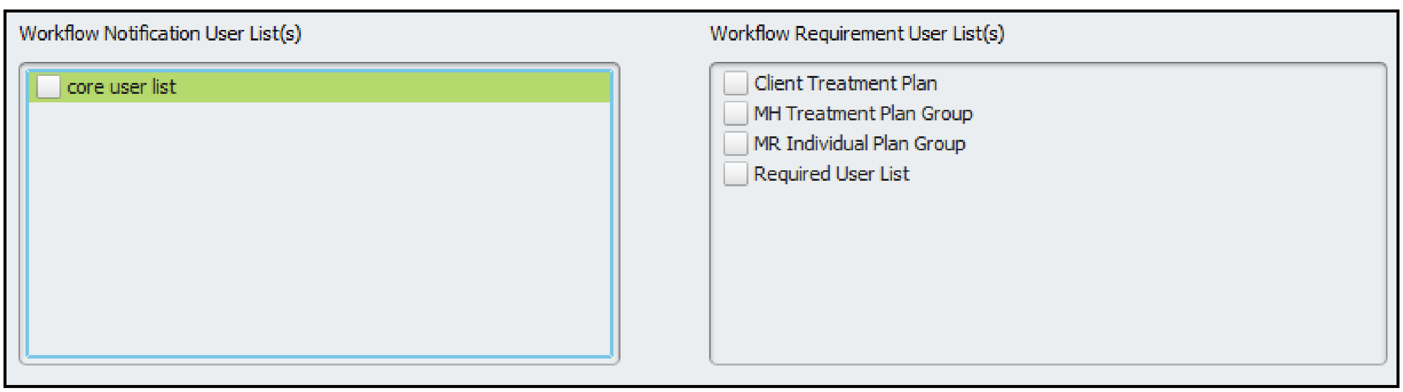
5. Allow Access to Clients with client alert ERROR – This determines whether the user can access clients who have been flagged as an emergency precaution.
6. Access to Registry Editor – Important, the registry editor is a configuration tool that should not be provided to all users. Access to it should 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



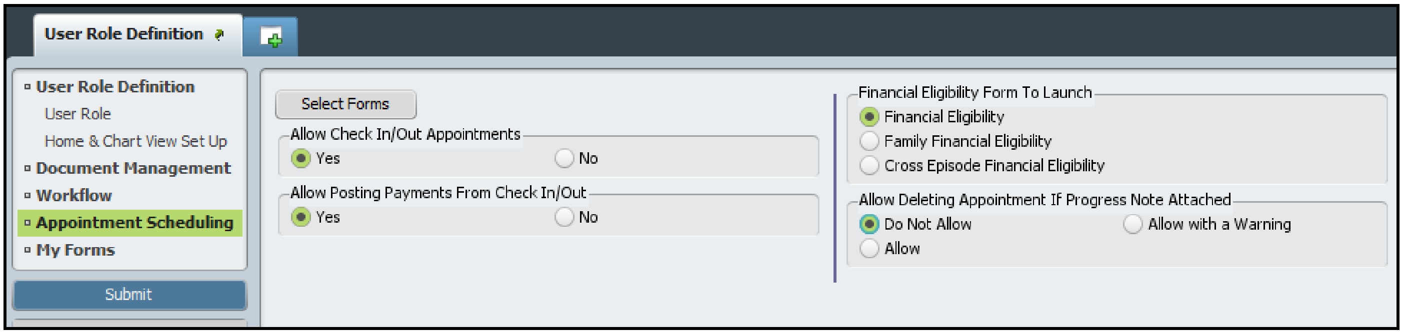
13. Document Management
    If the users are document management administrators they will have access to view, scan, print and void all forms. If not then specific forms for their access may be selected. **For this exercise, you will not complete this part of the form. Please move to the next section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



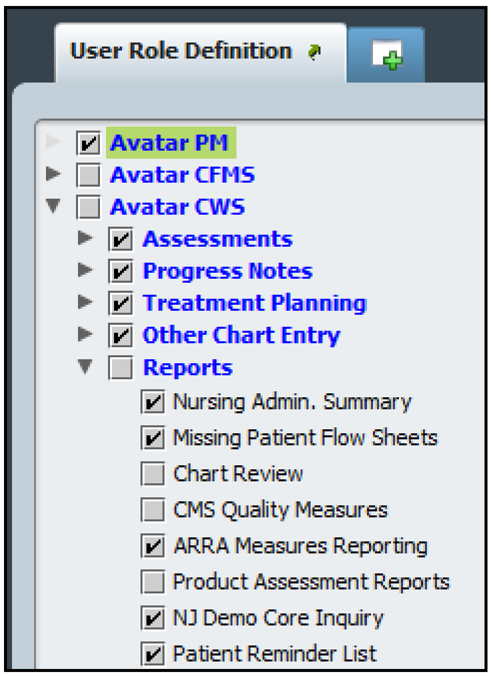
14. Workflow
    Here you may determine the workflow notification user lists and requirement user lists. **For this exercise, you will not complete this part of the form. Please move to the next section of the form- Appointment Scheduling.**



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.

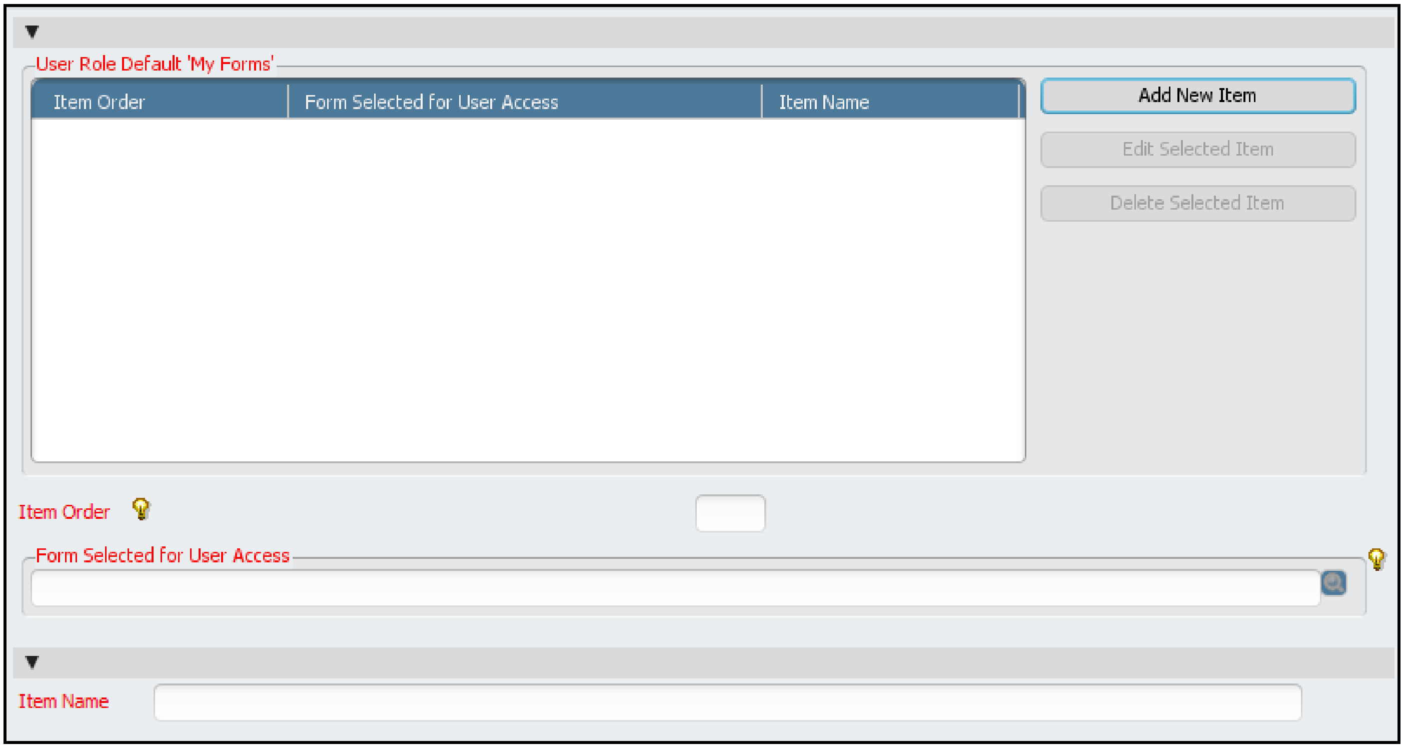


16. Click the Select Forms button and give access to some of the forms. A max of 15.



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.

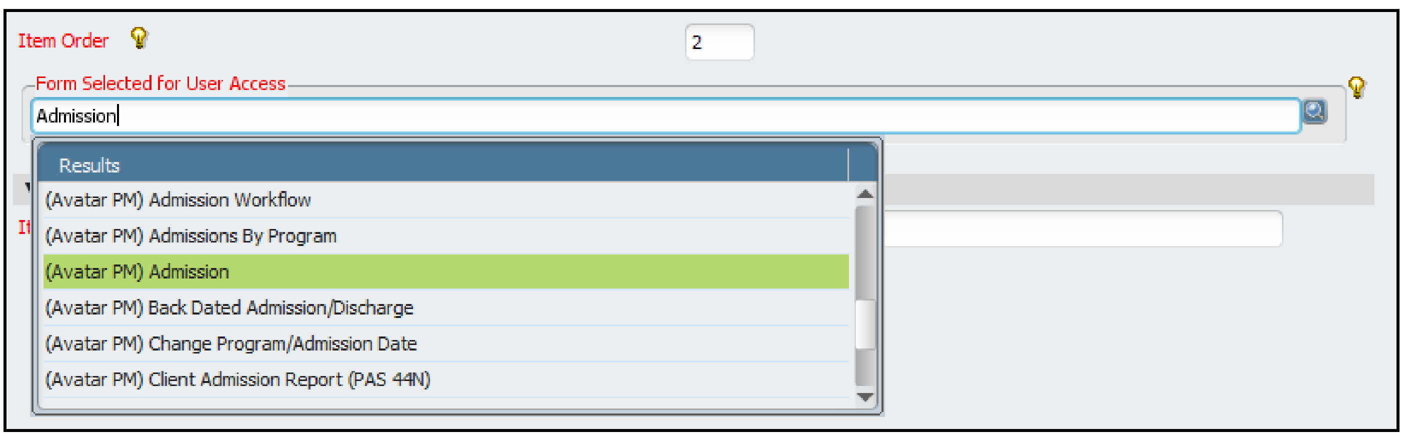
20. My Forms



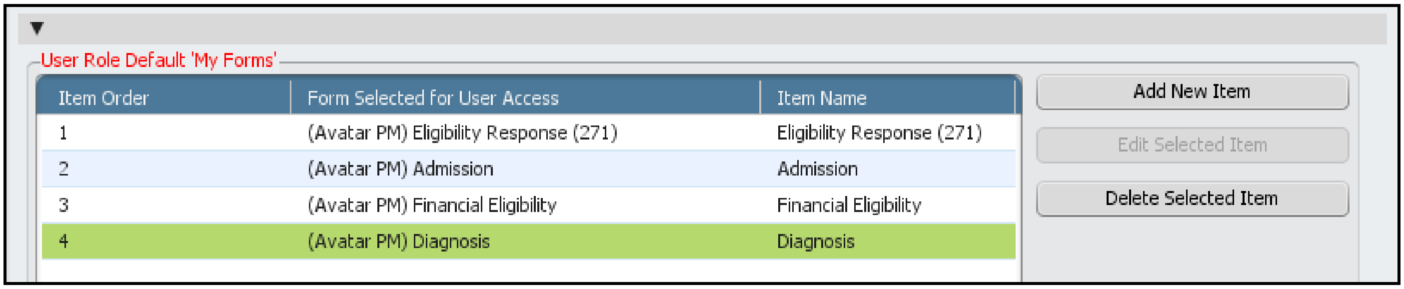
21. On this form you may create the default forms that show up under the User Role's "My Forms."

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.



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



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.

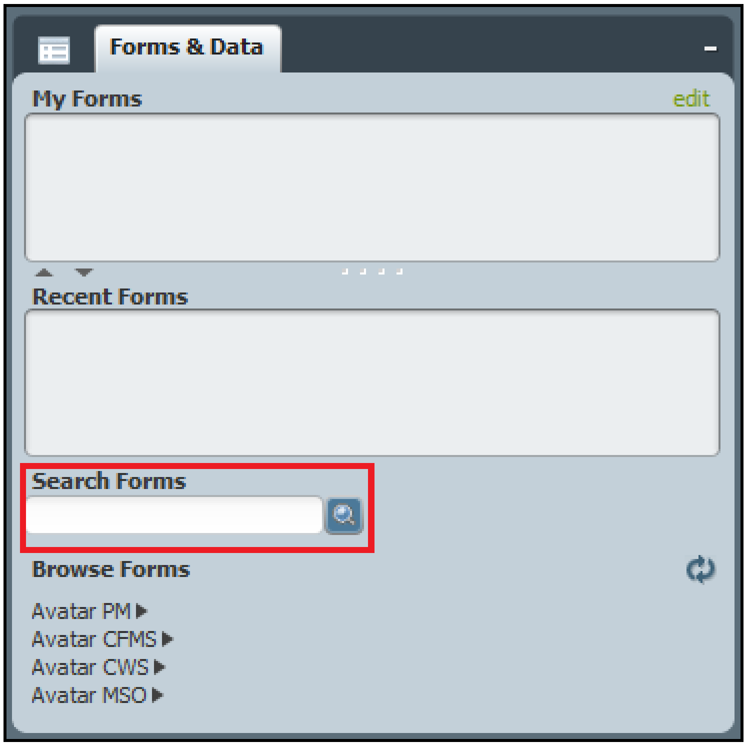
Section Recap:

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

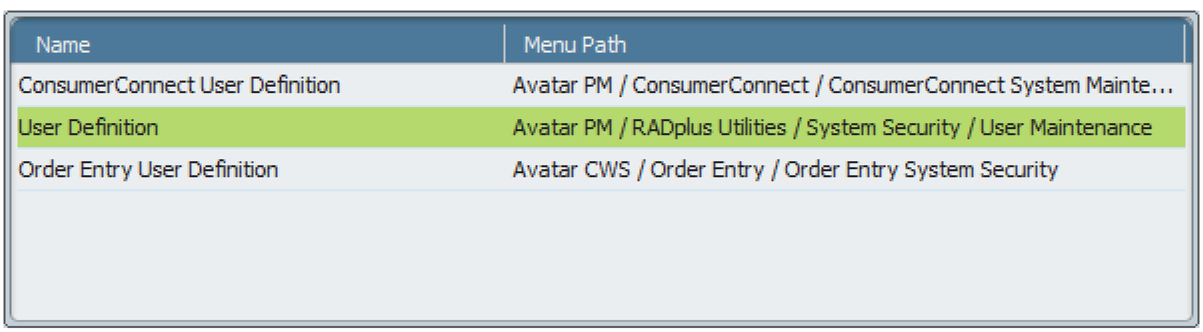
Create a new User

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.

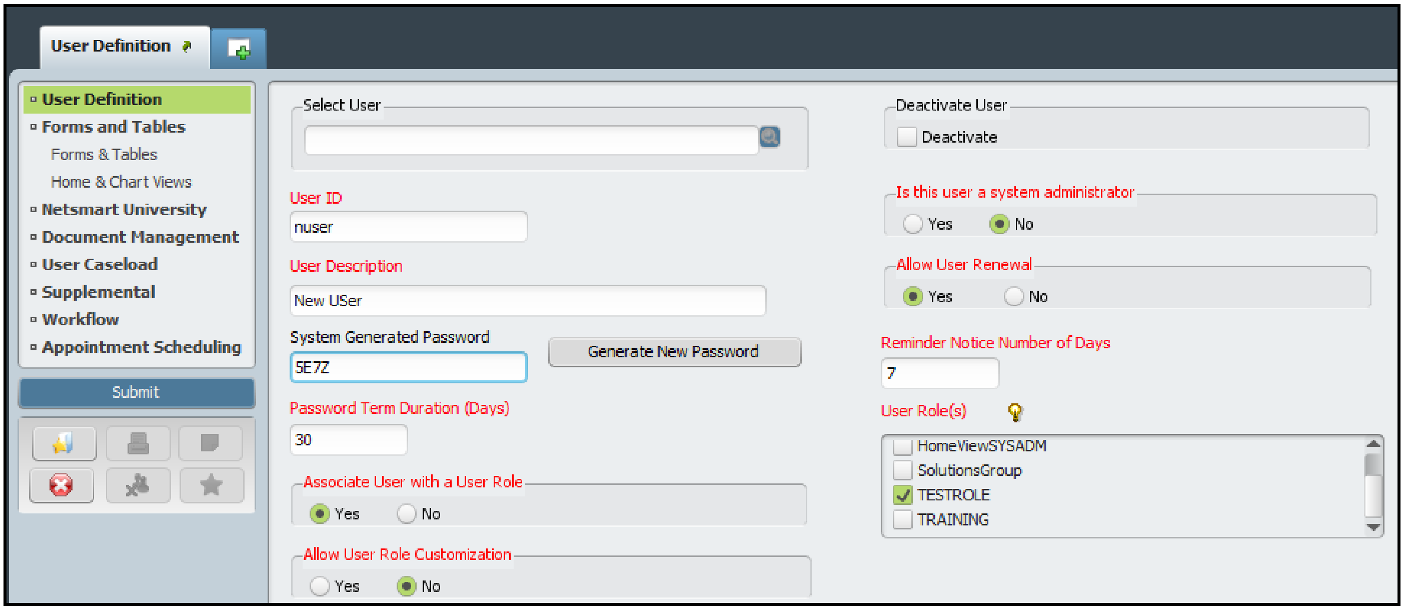


Name	Menu Path
ConsumerConnect User Definition	Avatar PM / ConsumerConnect / ConsumerConnect System Mainte…
User Definition	Avatar PM / RADplus Utilities / System Security / User Maintenance
Order Entry User Definition	Avatar CWS / Order Entry / Order Entry System Security

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.**

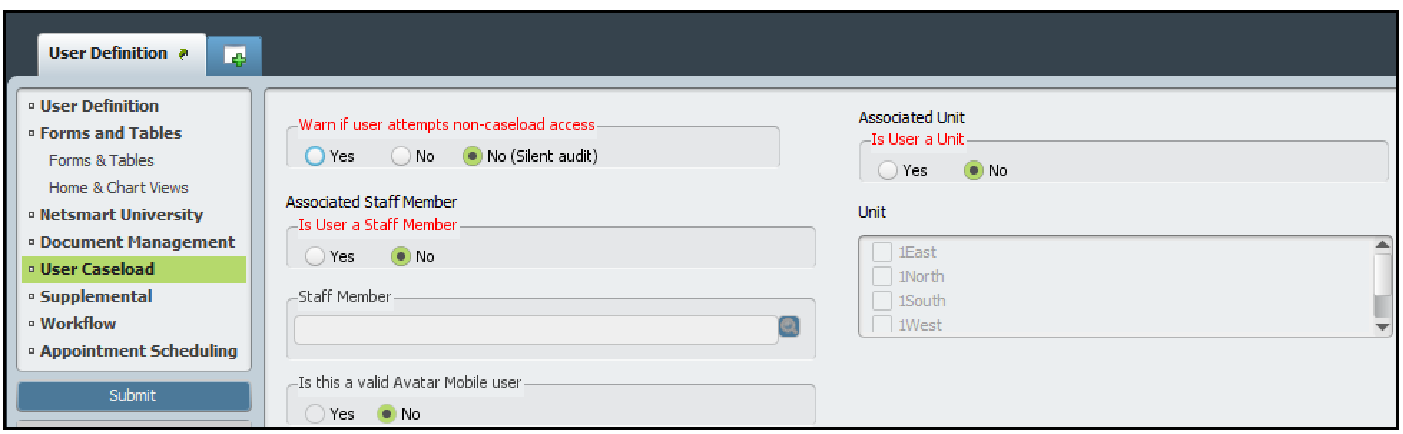


10. The Forms & Tables field will be disabled if you select a user role. If a user role has not been selected this field will need to be filled in to determine their access levels.

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

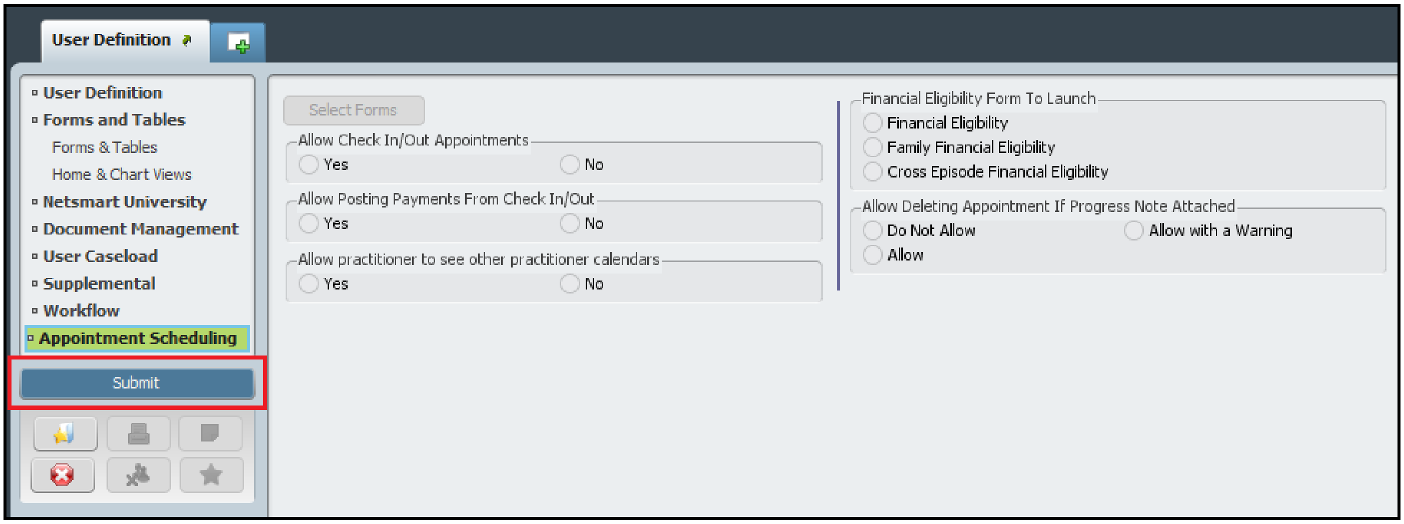


14. The "Warn if user attempts non-caseload access" option determines whether a message will appear for the user whenever they attempt to access something outside of their caseload. There are 3 options. **Select No.**

15. Yes – Will warn them.

16. No – Will not warn them.

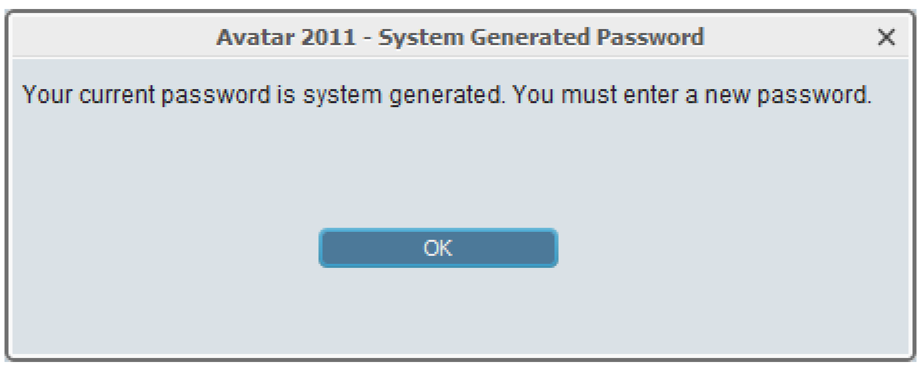
17. No (Silent Audit) – Will not warn the user but will keep a log whenever they access a client that is not in their caseload.
18. You may also determine whether a User is a “Staff Member” or if they are a “Unit” in the system, as well as whether they are a valid Avatar Mobile user. For all of these… **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**.

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

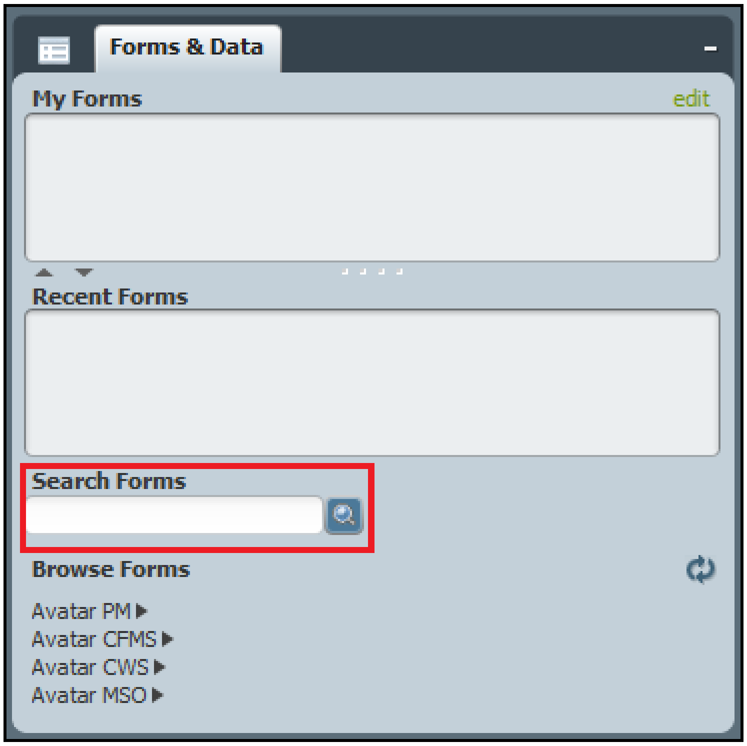
Section Recap:

- ✓ 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.

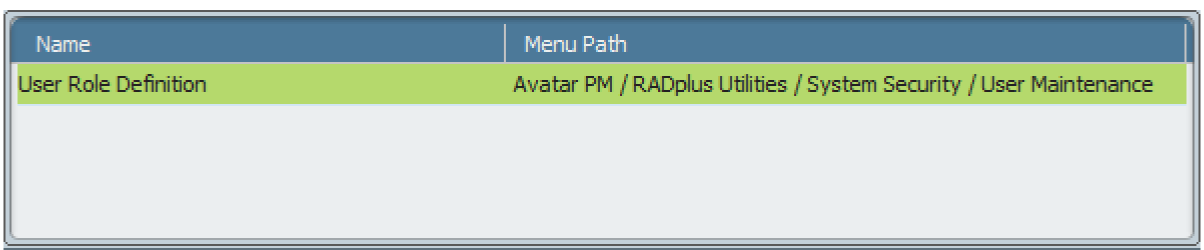
Update User Role

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.

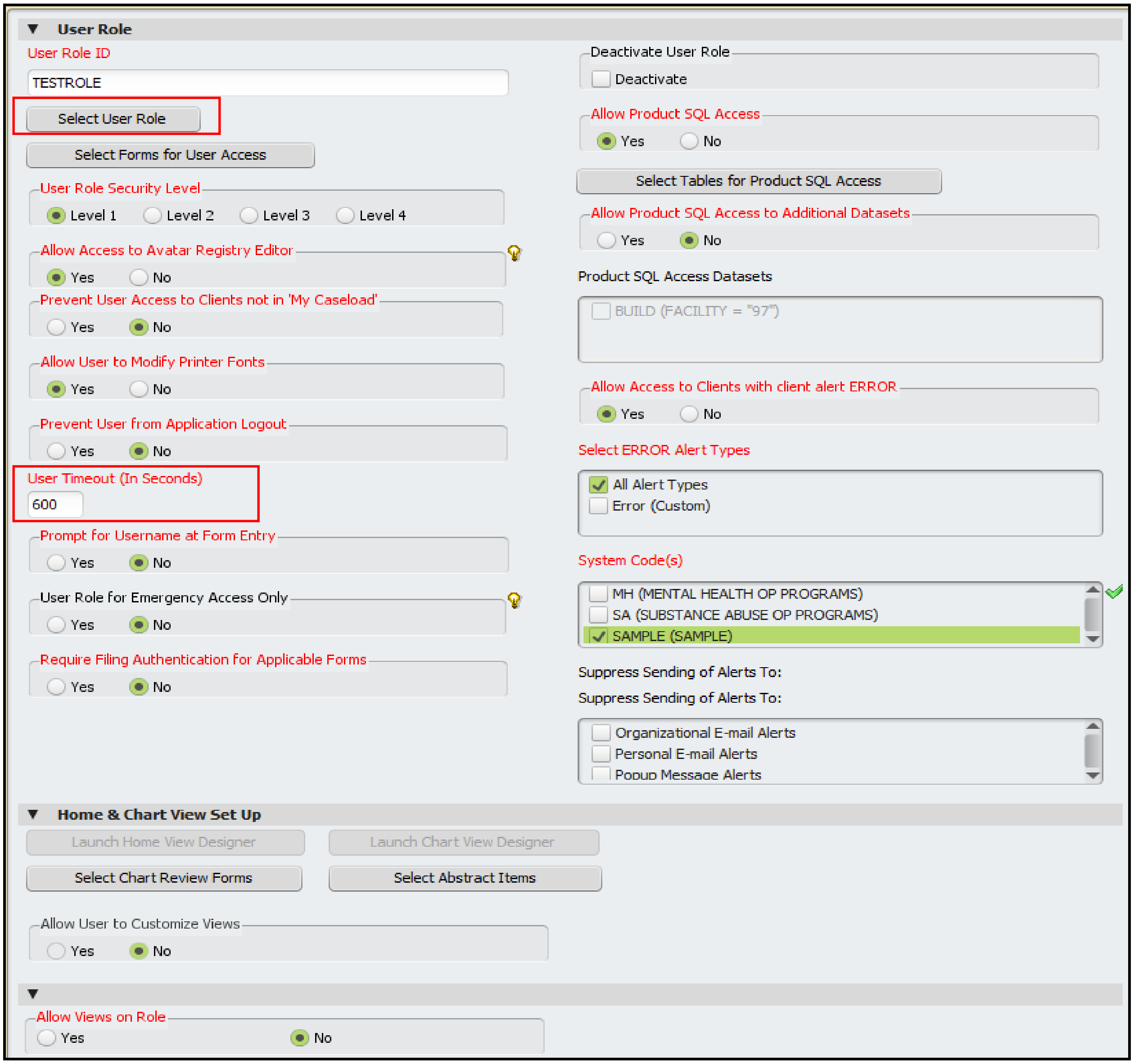
1. On the Home View locate the Forms & Data widget and click in the **Search Forms** field.



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



3. 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.



4. Change the “User Timeout” field to 600. Then click **Submit**.

5. 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.

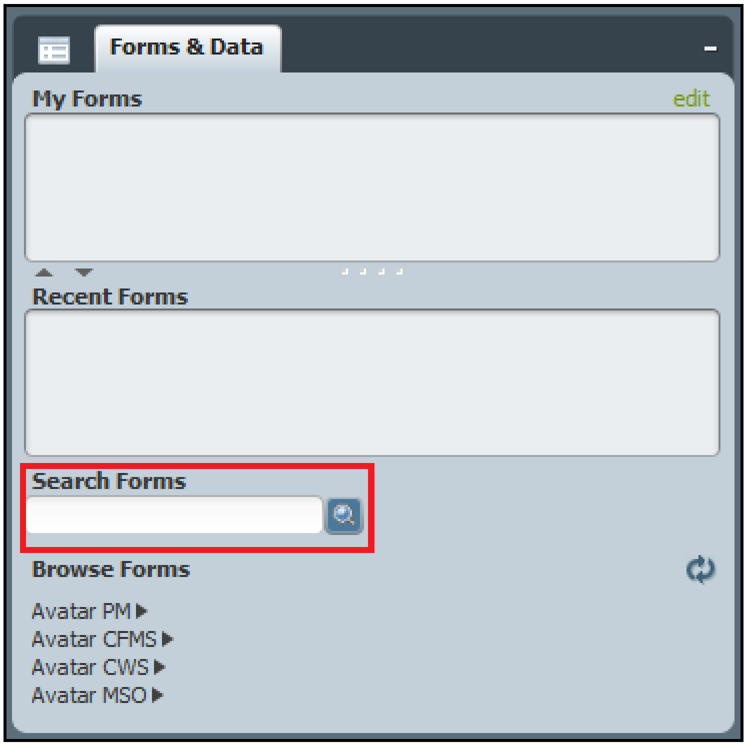
Section Recap:

- ✓ 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.

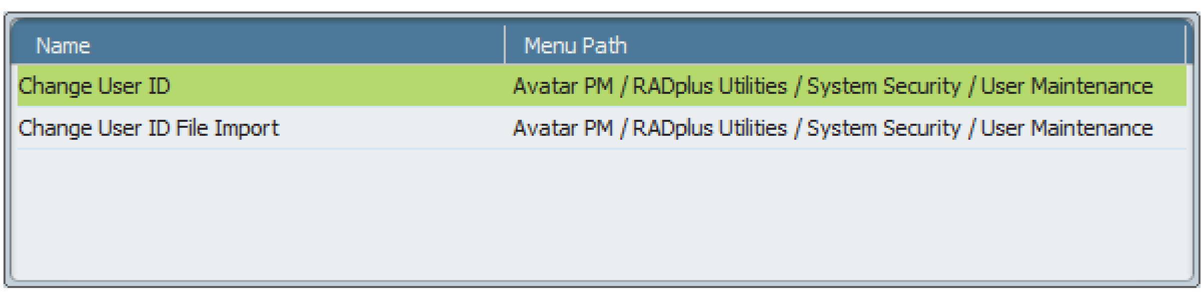
Change User ID

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.

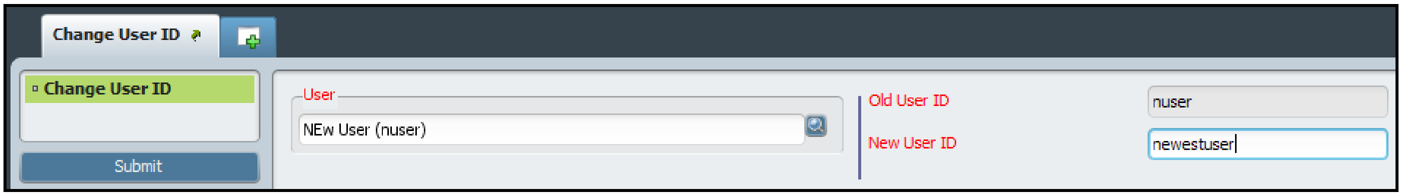
1. On the Home Screen locate the Forms & Data widget and click in the **Search Forms** field.



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



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



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

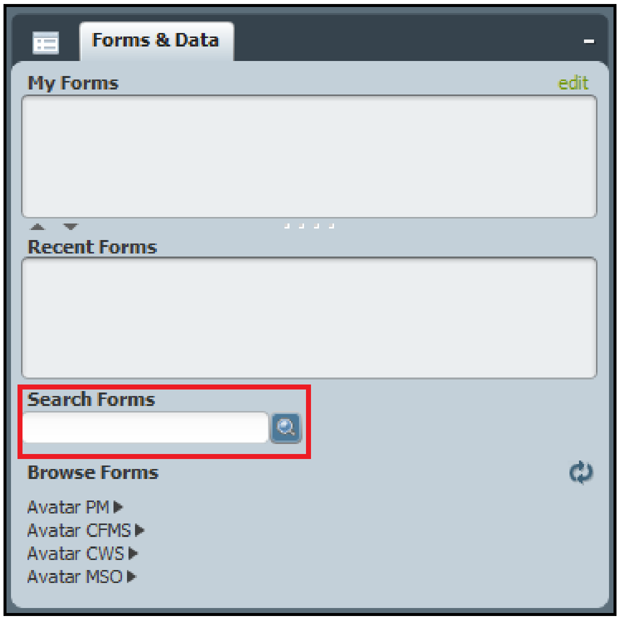
Section Recap:

- ✓ 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.

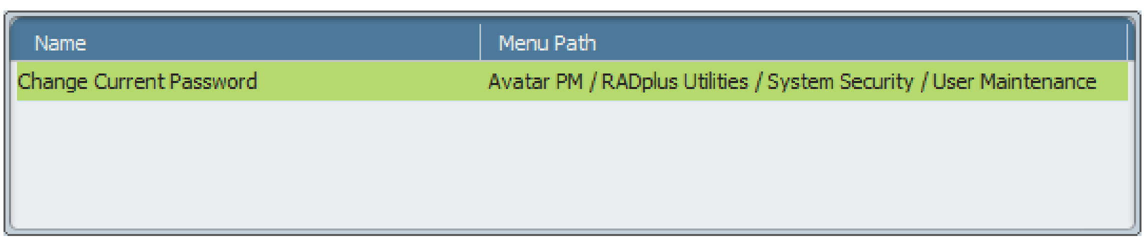
Change Password

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

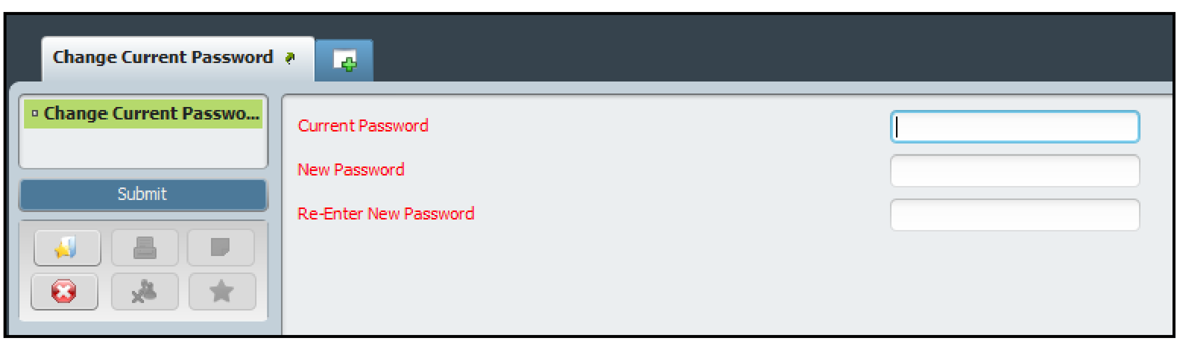
1. On the Home Screen locate the Forms & Data widget and click in the **Search Forms** field.



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



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



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

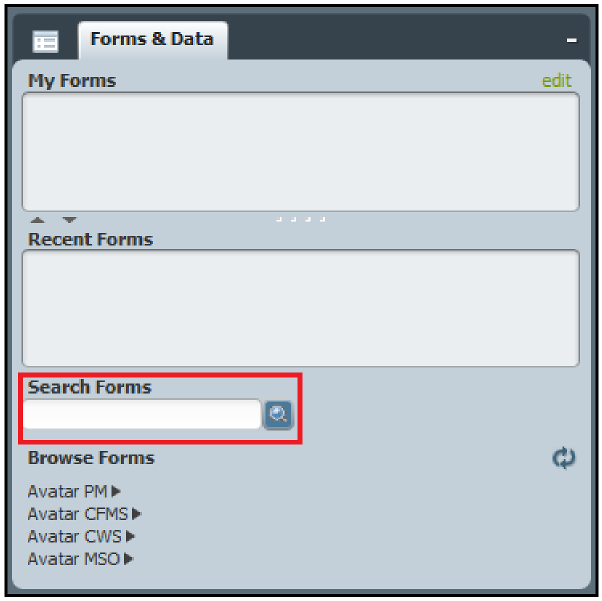
Section Recap:

- ✓ 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.

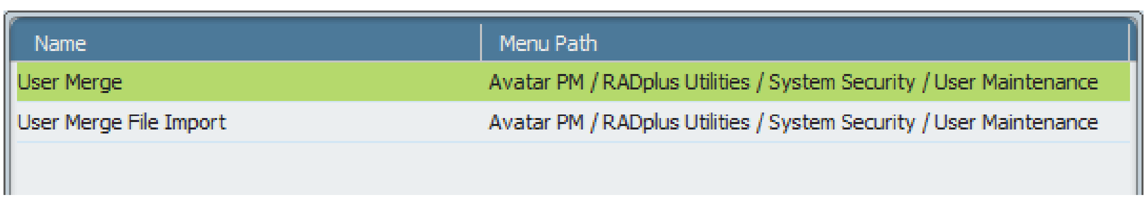
User Merge

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

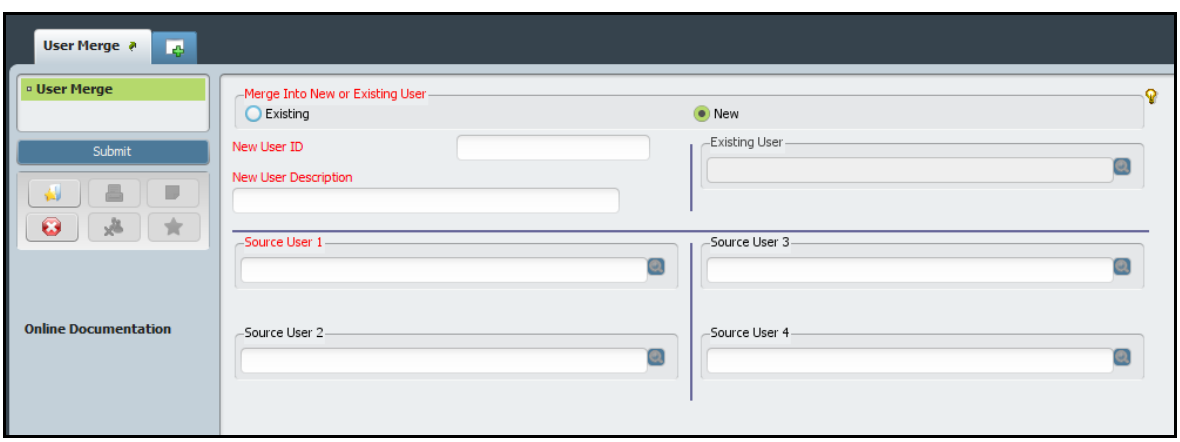
1. On the Home Screen locate the Forms & Data widget and click in the **Search Forms** field.



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



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.

SANDBOX NOTES