

## SANTA CRUZ COUNTY AVATAR INFORMATION NOTICE

### **TOPIC: Chart View Limits Notes to One Year (and How to Find Notes Older Than That)**

#### Avatar Form(s), Process and/or Users Affected

**Date** 3/6/2020

**Avatar Function** **Progress Note Chart View**

**Procedure** To view notes older than one year, use the Progress Note Widget.

**Users Affected** Any Avatar user who needs to look at progress notes in the chart.



To see notes older than one year, use the Progress Note Widget.

#### Summary/Introduction

Avatar limits the chart view for progress notes to only show notes that are one year old or less.

#### Reason/Rationale

The reason for limiting viewable notes to the last year only is that showing more notes could take a very long time to load or prevent the information from loading at all.

#### Detailed Description of Issue

Due to some glitches in the past year or so, Avatar has intermittently been showing progress notes that are older than one year, although it should not have been doing this. This is led to some confusion about where to find notes that are older than one year.

#### Solutions

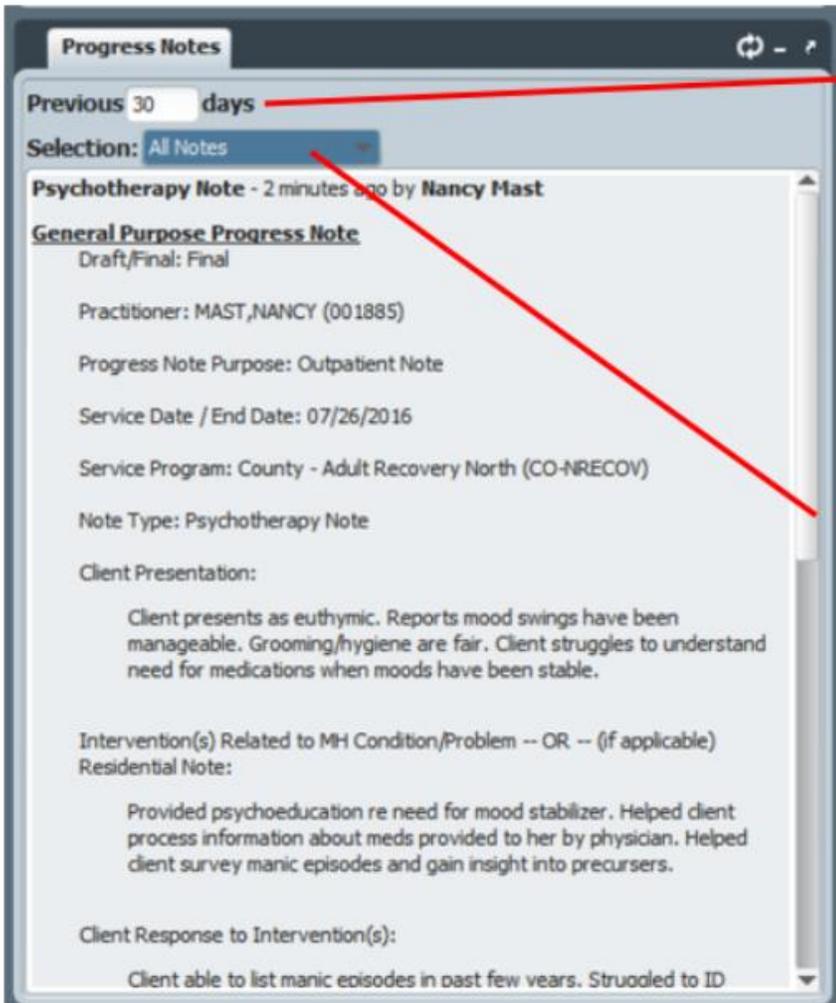
There are two places where you can see older progress notes. The easiest way to look at them is to use the **Progress Note Widget** that is in the chart. There is another form called the **Clinical Document Viewer** where you can also see chart documents, including progress notes.

#### **Progress Note Widget**

This widget is in the client charts. It is not on the Home Console. This widget shows all of a selected client's progress notes.

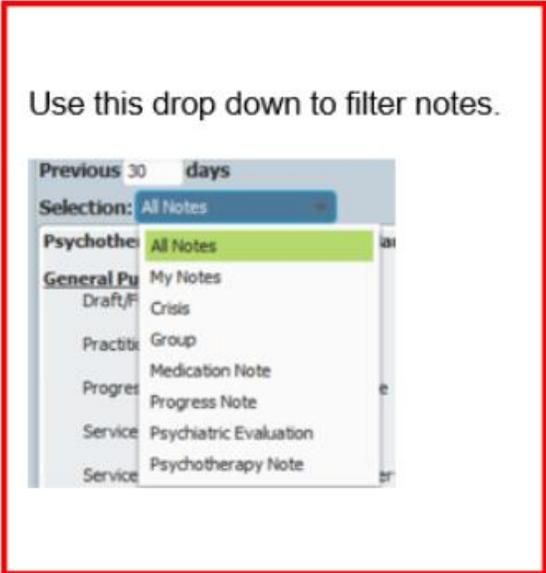
In the chart view, progress notes are separated by Admission Program or Episode and can be filtered in a variety of ways. The Progress Note Widget compiles all notes from all mental health programs and any substance abuse programs where the client has signed the [County Exchange of Information](#). All notes are shown, in order, by entry date (not service date).

The default for this widget is to show the last 30 days of notes. You can expand this range by typing in the number of days you want to see, and then pressing the **TAB KEY**. IMPORTANT: Remember to press tab after you type in the number of days or you won't be able to see all of the notes you want. (Pressing "Enter" won't work.)



To see more notes, erase the number 30 and type in the number of days you want to view.

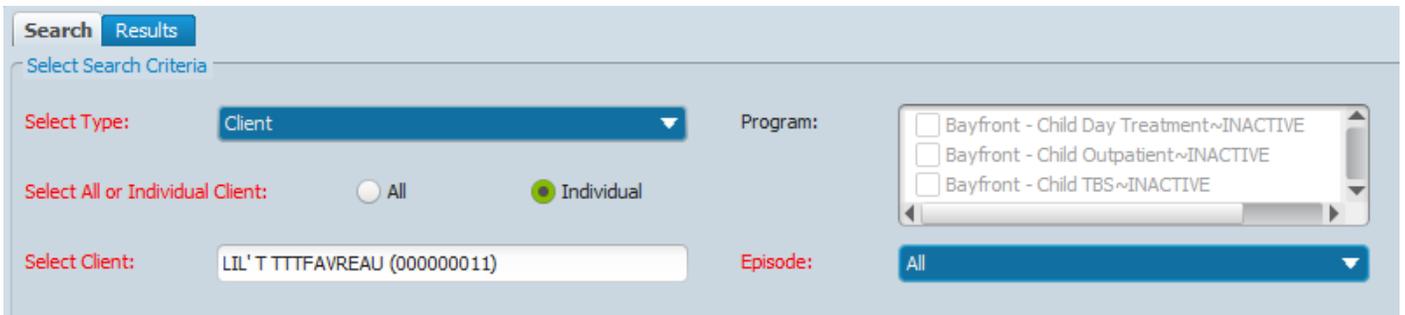
Then press tab. You must press tab for this to work.



**Clinical Document Viewer**

In addition to viewing documents in the client's chart, there is another way to see chart documents. It can be a bit tricky to use but may suit your purposes for certain types of tasks.

1. Open the Clinical Document Viewer in the "Forms" Widget on your Home Console.
2. Once the form is open, click "Individual" in the question, "Select All or Individual Client."
3. Enter either the client name or number in the "Select Client" field to select the chart from which you want to view documents.
4. Leave the "Episode" selection as "All." Do not try to select specific programs. This feature does not work.



5. Click "Process" at the bottom of the page.

You will now see a list of documents, double click on the document you want to see to view it.



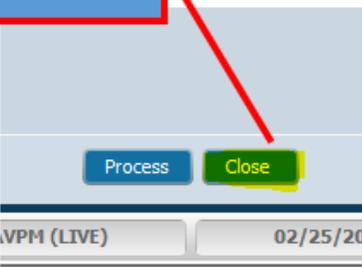
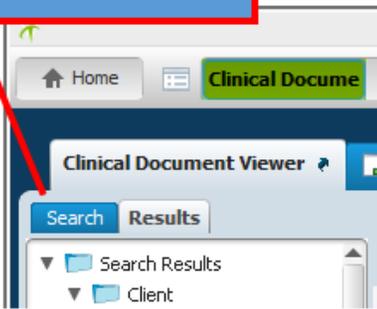
Double click in the row to view the document.

If you click on a column header, you can sort documents in the list.

View	Print	Client ID	Client Name	Episode	Linked Record	Document Description	Document Date	Document Status	Form Name	User
<input type="checkbox"/>	<input type="checkbox"/>	00000	0000000000000000	2		Crisis Assessment SC-Assessments (DR)	08/24/2016	Final	Assessments (DR)	00000000
<input type="checkbox"/>	<input type="checkbox"/>	00000	0000000000000000	2		Mental Status SC-Assessments (DR)	08/24/2016	Final	Assessments (DR)	00000000
						Assessments (DR)			Assessments (DR)	00000000
						Progress Notes (DR)			Progress Notes (DR)	00000000
						Progress Notes (DR)			Progress Notes (DR)	00000000
						Progress Notes (DR)			Progress Notes (DR)	00000000
						Progress Notes (DR)			Progress Notes (DR)	00000000
						Progress Notes (DR)			Progress Notes (DR)	00000000
						Progress Notes (DR)			Progress Notes (DR)	00000000

Click "Search" (upper left) to return to the main screen.

To exit the form, click "Close" at the bottom of the form.



**For More Information Contact**

The QI help desk at [askqi@santacruzcounty.us](mailto:askqi@santacruzcounty.us)

**Resources**

See the Avatar Clinicians Manual on the Santa Cruz Avatar webpage.

<http://www.santacruzhealth.org/hsahome/hsadivisions/behavioralhealth/avatarresources.aspx>

The easiest way to get to the web page is to type "Avatar" into your Search Forms field in Avatar. Double click "Avatar Resources" to open the page.

Search Forms

avatar

Name	Menu Path
Avatar Resources	Avatar PM / Resources

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