

Printing

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Overview

A description of which types of information can be printed, and how to print them.

Applicable Staff

All Avatar users have the ability to print information that they have access to. Access depends on user role.

Usage

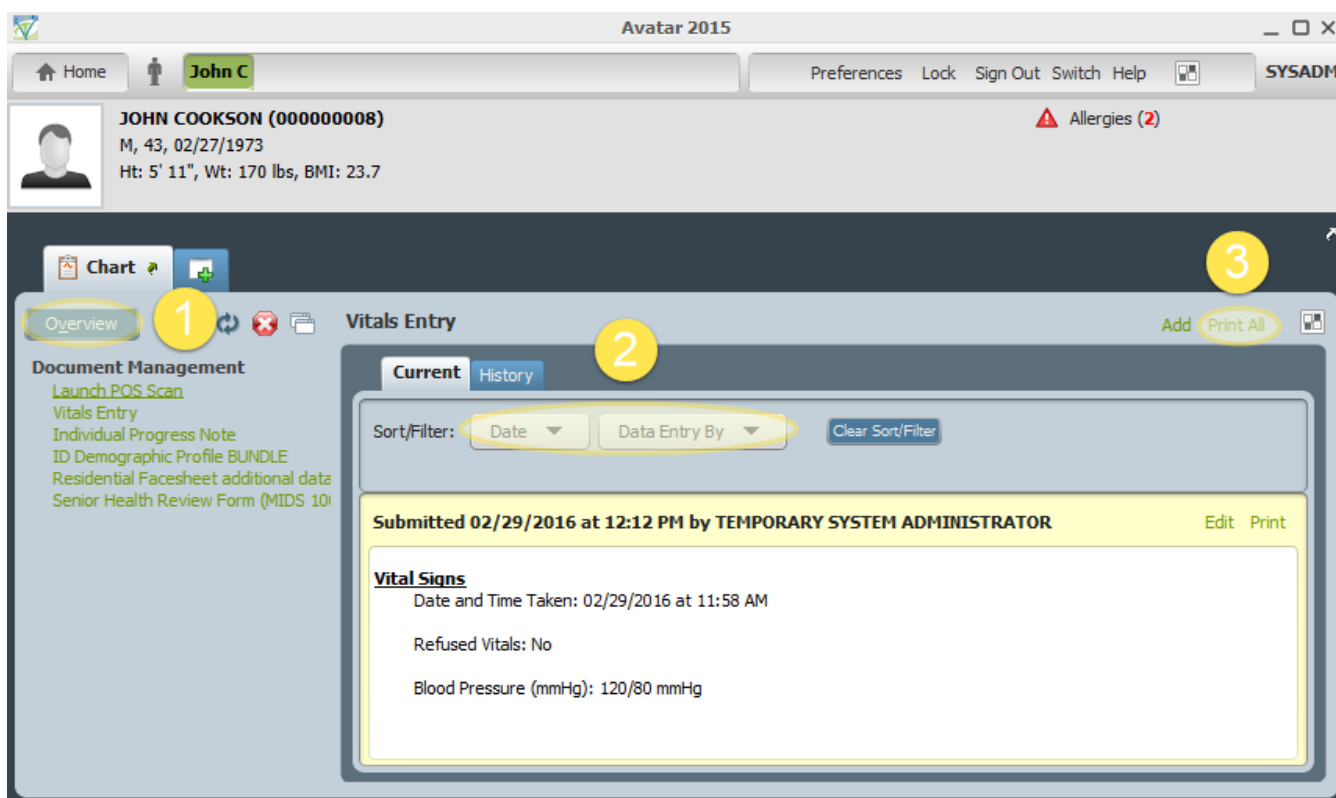
There are three types of information that can be printed in Avatar.

Reports:

Reports are collections of data that are determined by the user, and are discussed in detail in this article: [Running Reports](#) Printing is accomplished by creating a report as per the instructions in the aforementioned article and selecting one of the print options available, dependent upon the type of report created.

Chart Documents:

Chart Documents are accessed in the **Overview** (1 in the image below), shown when you access the **Chart View**. Available documents are listed on the left of the screen under the **Overview** button (available documents will vary depending upon user role and system setup). Select a document and filter results as/if required (2). Click **Print All** (3) on the right to print the selected document(s).



Clinical Document Viewer:

The Clinical Document Viewer allows searching for specific types of information according to specific groups (Client, Staff, Family, User). Data can be further refined by Program, Episode, Document Source/Status, and Date. Open the Clinical Document Viewer by searching in the **Search Forms** field of the Home View or following the menu path - Avatar CWS/Document Management/Clinical Document Viewer. This is the viewer as it opens to the Search function:

Clinical Document Viewer

Search **Results**

Select Search Criteria

Select Type: Program: ADULT MENTAL HEALTH OUTPATIENT SERVICE
 ADULT MH OUTPATIENT SNS
 ADULT MH OUTPATIENT EC

Select All or Individual Client: All Individual

Select Client: Episode:

User:

Document Status: Final Void Document Source: Batch Scanning Module
 Document Routing
 POS Scan / Import
 Web Service API

Document Origination Date Start: End:

Form Selection	Form Restrictions	Include	Exclude
<input checked="" type="radio"/> Entire Chart	Do Not Print	<input type="radio"/>	<input checked="" type="radio"/>
<input type="radio"/> Legal Medical Record	Do Not Release	<input type="radio"/>	<input checked="" type="radio"/>
<input type="radio"/> By Categories / Forms <input type="button" value="Select"/>	Archived Documents	<input type="radio"/>	<input checked="" type="radio"/>

The user must select the **Type** of record to search (Client, Family, Staff, User - only 1 selection can be

made), and whether to search **All** clients or an **Individual**. If Individual is selected, the **Select Client** field activates allowing input of a client name. The field uses a live search by last name that narrows as more information is entered. If an individual record is selected, the user must also choose which **Episode** to search.

All available **Programs** can be used to narrow search results. Select by checking as many boxes as desired. All programs can be selected at once by checking one and pressing CTRL A.

You can choose to only display **Final** or **Voided** documents by checking the appropriate boxes, as well as Document Sources.

Document Origination Date can be selected in a From-To format by entering dates in their respective fields.

The **Form Selection** section can be used to specify whether to search the entire chart, the **Legal Medical Record**, or specific **Categories/Forms**. Select by clicking the radio button(s). If **By Categories/Forms** is used and the **Select** button is clicked, a new search window opens showing all available categories and forms that can be selected.

Clinical Document Viewer

Search **Results**

Select Search Criteria

Select Type: Client **Program:** ADULT MENTAL HEALTH OUTPATIENT SERVICE
 ADULT MH OUTPATIENT SNS
 ADULT MH OUTPATIENT EC

Select All or Individual Client: All Individual

Select Client: JANE SMITH (000000001) **Episode:** All

User:

Document Status: Final Void

Document Source: Batch Scanning Module Document Routing POS Scan / Import Web Service API

Document Origination Date Start: End:

Form Selection Entire Chart Legal Medical Record By Categories / Forms **Select**

Form Restrictions

	Include	Exclude
Do Not Print	<input type="radio"/>	<input checked="" type="radio"/>
Do Not Release	<input type="radio"/>	<input checked="" type="radio"/>
Archived Documents	<input type="radio"/>	<input checked="" type="radio"/>

Process **Close**

Client, Staff, Family, User

Individual enables Select Client

Selecting Categories/Forms enables Select button

Check boxes to include specific items. Collapse and expand sections by clicking the arrows next to the titles. Click **OK** to use the search.

Select Categories/Forms



- ▼ **All Forms**
- ▼ **ASSESSMENT**
 - Individual Assessment
 - Initial Assessment/Demographic Profile
 - Senior Health Review Form
 - Trial Visit Summary/Initial Assessment
- ▶ **Client Progress Notes**
- ▼ **CORRESPONDENCE**
 - Authorization for Use/Disclosure of PHI
- ▼ **DISCHARGE**
 - Transfer/Discharge Form
- ▶ **FINANCE**
- ▶ **FINANCE AND ORIENTATION**
- ▼ **HX/PHYS**
 - Admission Physical
 - Behavioral Appointment Summary
 - Dental Treatment and Hygiene Plan
 - Medical Appointment Summary
 - Medical History Summary
 - Seizure Record
- ▼ **IDS OVR**
 - Hrs Negotiated to meet Job Coaching Need
 - Job Coaching Needs, Determination + TP
 - MARF
 - Placement Information
- ▼ **MEDS**
 - Controlled Substance Record
 - Medication Log
 - Medication Side Effects Sheet
 - PRN Record
- ▼ **NOTES**
 - IDS Individual Progress Note
 - Monthly Report/Quarterly Report
 - SEEP
- ▼ **ORIENTATION**
 - Personal Inventory Record
- ▶ **OTHER**
- ▼ **TX PLAN**
 - Internal Individual Transition Plan
 - Option to Decline Information

OK

Cancel

By using the **Form Restrictions** section, a user can choose to restrict the search by excluding documents that have been marked **Do Not Print**, **Do Not Release**, or **Archived Documents**.

Form Restrictions	Include	Exclude
Do Not Print	<input type="radio"/>	<input checked="" type="radio"/>
Do Not Release	<input type="radio"/>	<input checked="" type="radio"/>
Archived Documents	<input type="radio"/>	<input checked="" type="radio"/>

When satisfied, click **Process** to run the report and display the data. You can switch between the results and the search screen by switching the **Search/Results** tabs at the top of the screen.

Results are displayed in 2 ways. On the left of the screen from top to bottom is a tree view of all results by type. Information can be expanded or collapsed by clicking the arrows next to each type of document. Results are displayed by Client and Form Category first, then further by Name, Category, etc. Clicking a folder will open that document and show it in the main viewer portion of the screen.

Expand or Collapse categories with Arrows

View	Print	Client ID	Client Name	Episode	Linked Record	Document Description
<input type="checkbox"/>	<input checked="" type="checkbox"/>	1	SMITH, JANE	Nonepisodic		MARF
<input type="checkbox"/>	<input type="checkbox"/>	1	SMITH, JANE	Nonepisodic		MARF
<input type="checkbox"/>	<input checked="" type="checkbox"/>	1	SMITH, JANE	Nonepisodic		Medication Log
<input type="checkbox"/>	<input type="checkbox"/>	1	SMITH, JANE	Nonepisodic		should be mar
<input type="checkbox"/>	<input checked="" type="checkbox"/>	1	SMITH, JANE	Nonepisodic		test image
<input type="checkbox"/>	<input type="checkbox"/>	1	SMITH, JANE	Nonepisodic		test image
<input type="checkbox"/>	<input type="checkbox"/>	1	SMITH, JANE	Nonepisodic		Voting Form

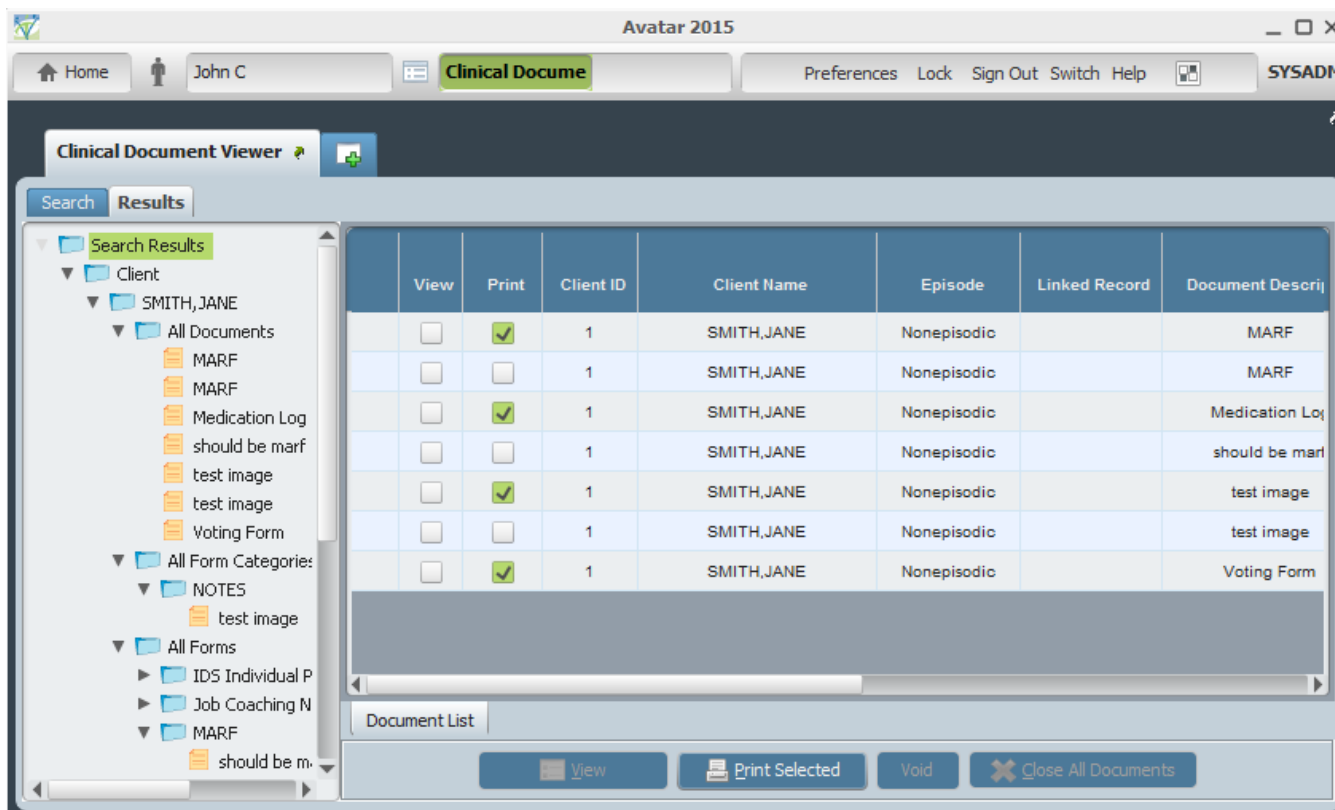
Return to Document List or view other documents

Document List: SMITH, JANE (1) - MARF

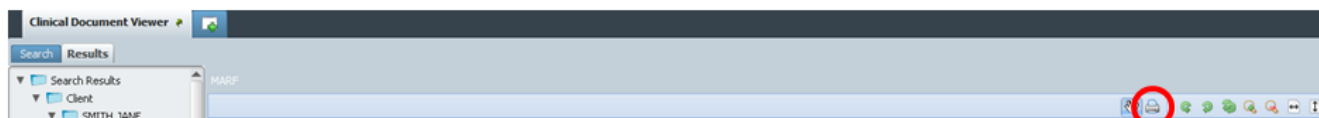
Buttons: View, Print Selected, Void, Close All Documents

The main part of the screen is the document viewer which will display all search results in a list that contains information such as View & Print option check boxes, Client ID, Name, Episode #, Linked Record (if applicable), Document Description, Date, Status, Form Name, User that created the

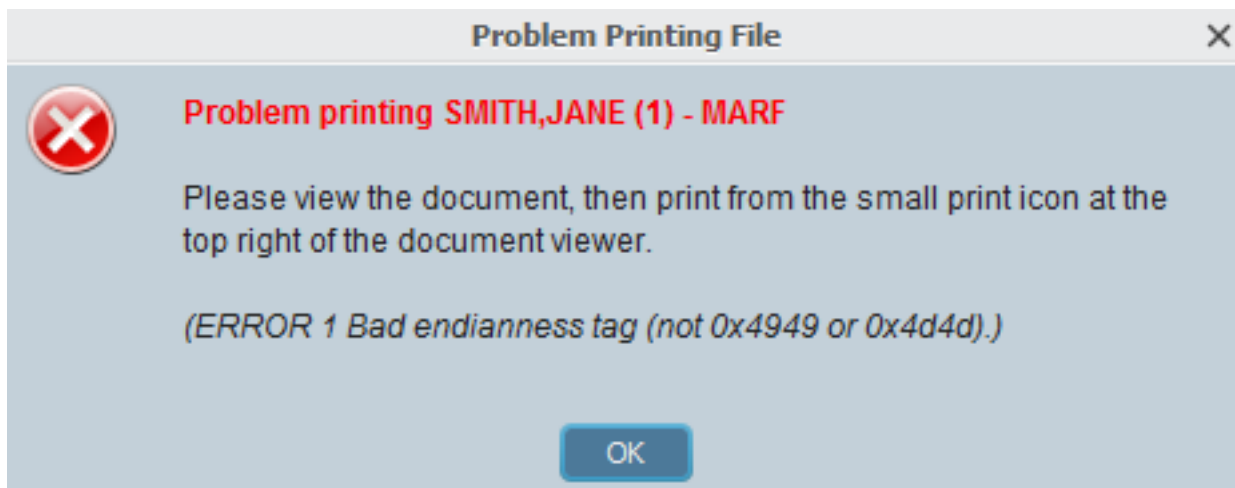
document, and whether or not it has been marked as Do Not Release. Click the **Print** checkboxes next to the records you wish to print and click the **Print Selected** button on the bottom of the viewer.



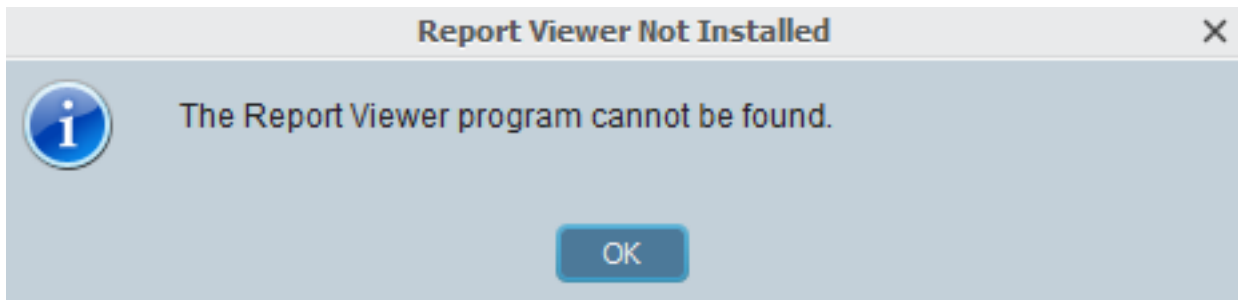
If you wish to print a single document, you can follow the instructions above or click the document name in the list and click the Printer icon on the top row of buttons.



If the following error appears, follow the instructions above to print documents individually.



If the following error appears, contact your system administrator to install the program:



Tips & FAQ

If using a local printer, please secure all documents and keep them out of view.

Only printers that have been previously installed on your particular workstation will be available to add to Avatar. If you require a printer that has not been added, please add it manually or contact your IT department for assistance.

If an error occurs stating that the "Report Viewer Cannot Be Found" please contact your IT Department to install the Viewer program.

Technical Information

Menu Location Avatar CWS/Document Management/Clinical Document Viewer)

Posted by: [John Cookson](#) - Tue, Mar 1, 2016 at 4:37 PM. This article has been viewed 5028 times.

Online URL: <https://www.mercykb.com/article.php?id=42>