

# Home View Basics

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## Overview

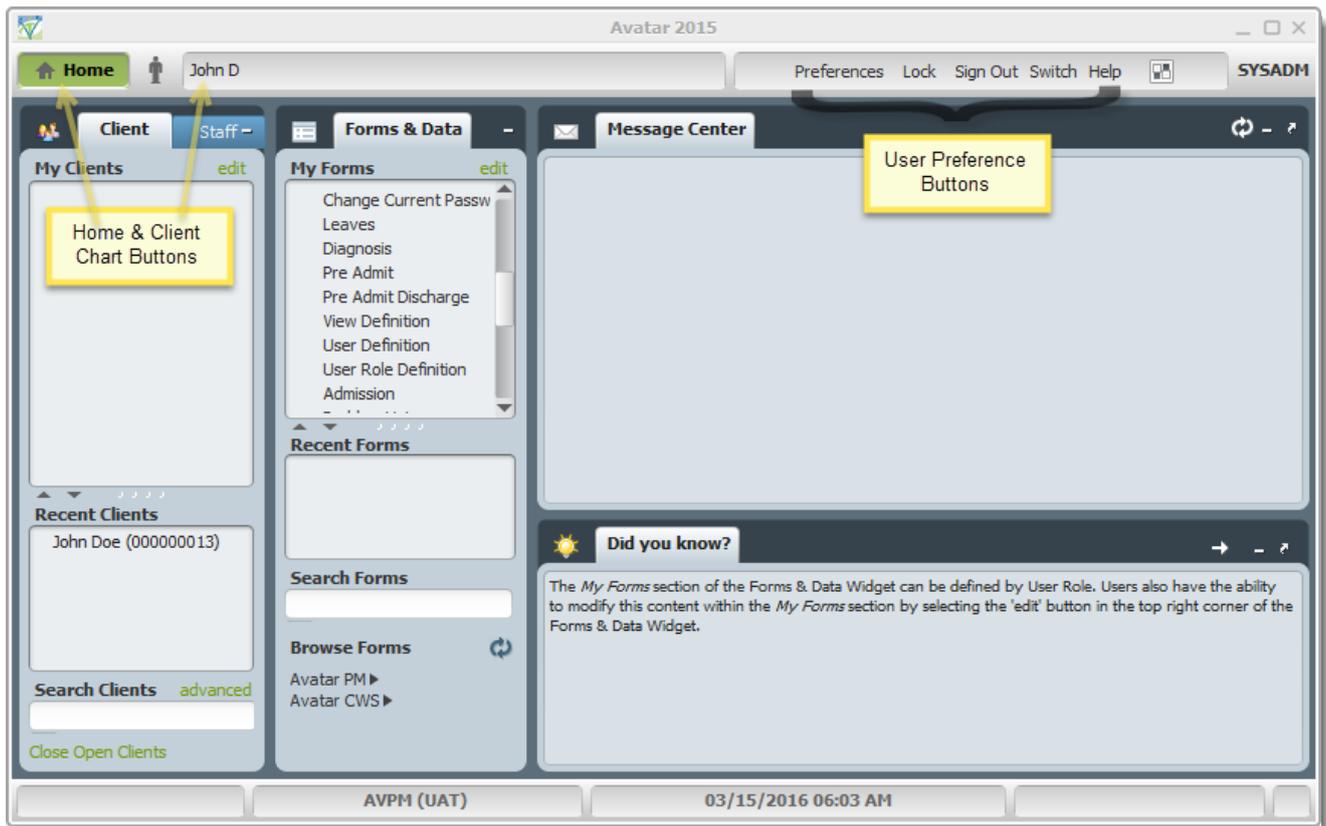
The Avatar Home View is the first screen accessed when logging in. It is the base for navigating to any individual record or form, changing preferences, locking the user session, and logging out.

## Applicable Staff

All Avatar users may access the Home View. User Role determines which options are available and the layout of the screen.

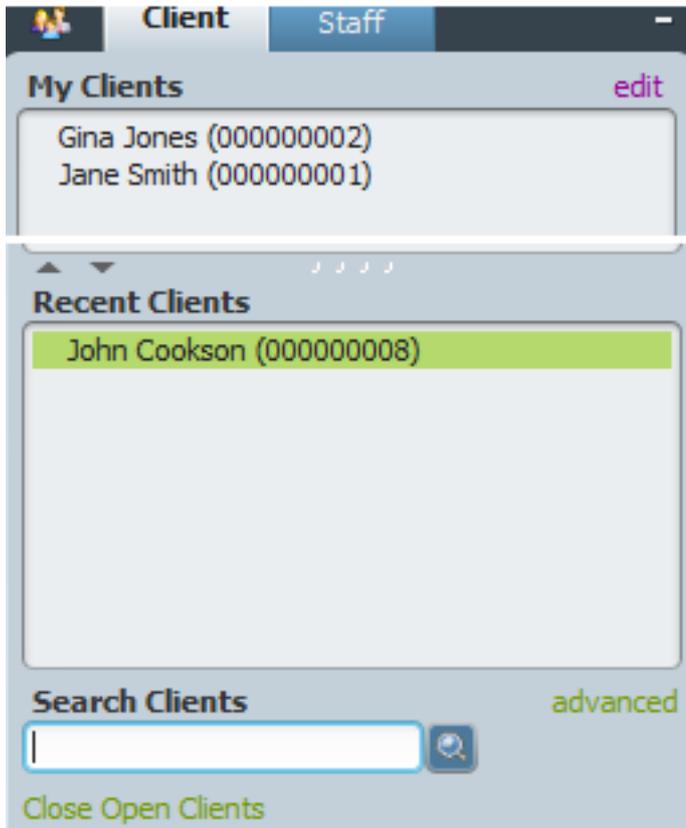
## Usage

The Home View opens as represented below. The default view shows information arranged in widgets for **Client/Staff** access, **Forms & Data** available, the **Message Center**, and a widget to view automatically generated tips. These widgets can be modified by each user according to rules set by the administrator.



The **Client/Staff** widget allows access to any staff member that is assigned to your group or the facility (depending on your user level) or any currently admitted clients. Any individuals that have been added to **My Clients** by the user will be displayed there for ease of access in the current session. Individuals that have been added to the staff caseload during the admissions process or by assigning the Attending Practitioner will always be available here.

Any recently viewed clients will appear in the **Recent Clients** section for the current session. Clients can be searched by Last Name in the **Search Clients** field at the bottom of the section. The same functionality appears in the **Staff** tab. Double-click the desired name to open the record. Searching for clients is covered in detail in the article "Client Lookup". [Client Look Up](#)



The **Forms & Data** widget shows forms that have been added to **My Forms**, **Recent Forms** that have been viewed, and a field to search for forms by name or type. Double-click a form name if it appears in one of the lists to open. When using the **Search Forms** field, a live search screen appears as you type. Double-click the form name to select and open. Using forms is discussed in detail in the "Using Forms" article here. Using a Form



## Forms & Data

### My Forms

[edit](#)

Form Designer  
Trial Visit Summary(MIDS)  
Senior Health Review Form (MIDS 1002)  
Vitals Entry  
Individual Assessment (MIDS 601)  
Medical History Summary MIDS  
SEEP MIDS  
IDS Individual Information Sheet (MIDS)  
Outcome Action Plan  
Inpatient Progress Notes  
Official Census Report



### Recent Forms

Progress Notes (Group and Individual)

### Search Forms



### Browse Forms



Avatar PM ▶

Avatar CWS ▶

Forms & Data Message Center

**My Forms** edit

- Form Designer
- Trial Visit Summary(MIDS)
- Senior Health Review Form (MIDS 1002)
- Vitals Entry
- Individual Assessment (MIDS 601)
- Medical History Summary MIDS
- SEEP MIDS
- IDS Individual Information Sheet (MIDS)

Name	Menu Path
Inpatient Progress Notes	Avatar CWS / Progress Notes
Progress Notes (Group and Individual)	Avatar CWS / Progress Notes
Inpatient Progress Notes (Diagnosis Entry)	Avatar CWS / Progress Notes
Append Progress Notes	Avatar CWS / Progress Notes
Ambulatory Progress Notes	Avatar CWS / Progress Notes
Ambulatory Progress Notes (Diagnosis Entry)	Avatar CWS / Progress Notes
Independent Group Progress Notes	Avatar CWS / Progress Notes
Void Progress Notes	Avatar CWS / Progress Notes
Case Management Progress Note	Avatar CWS / Progress Notes
Group Progress Note	Avatar CWS / Progress Notes
Individual Progress Note	Avatar CWS / Progress Notes
Nursing Progress Note	Avatar CWS / Progress Notes
Physician Psych Progress Note (E+M Note)	Avatar CWS / Progress Notes
Aces / Acts Follow Up Progress Note	Avatar CWS / Progress Notes

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progress note

**Browse Forms**

- Avatar PM ▶
- Avatar CWS ▶

The upper row of buttons allows switching between any open client records and customizing the user

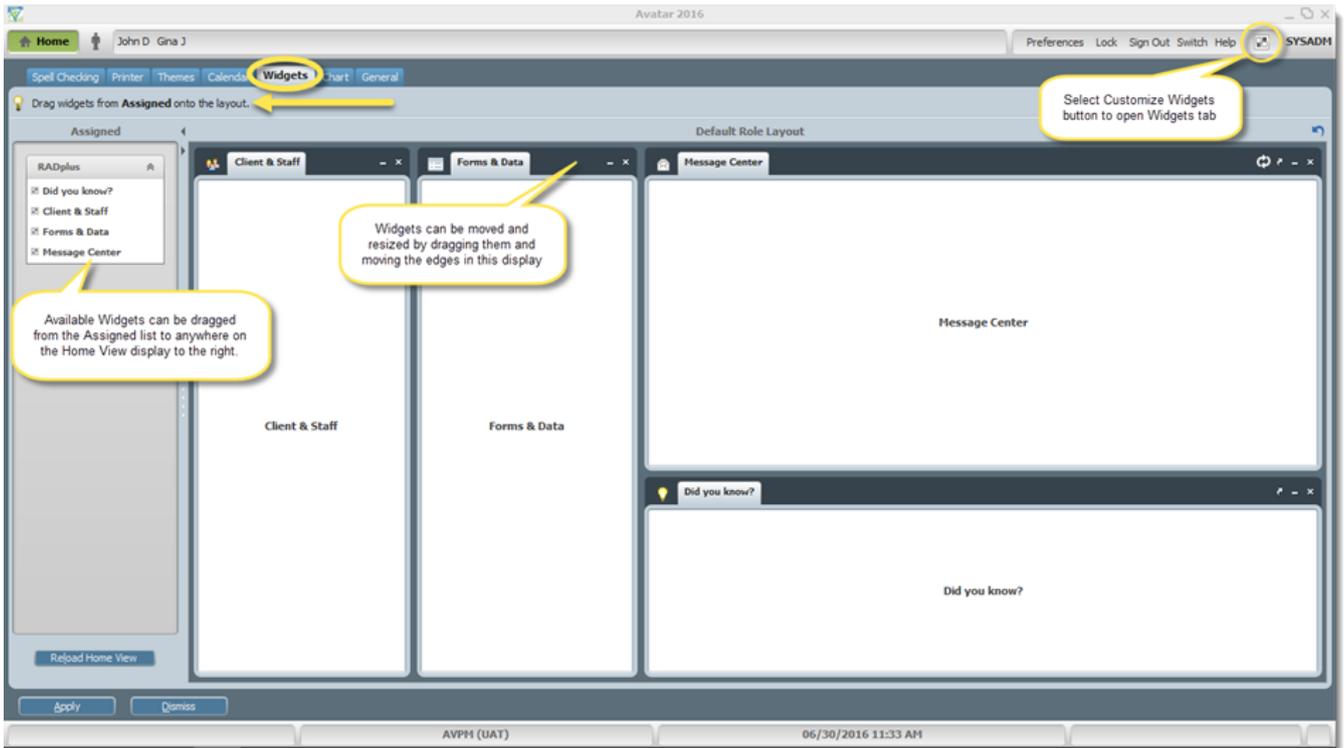
experience. Any open records will be shown by name next to the Person icon  at the top left. Switch between client records and the Home View by clicking the appropriate buttons.



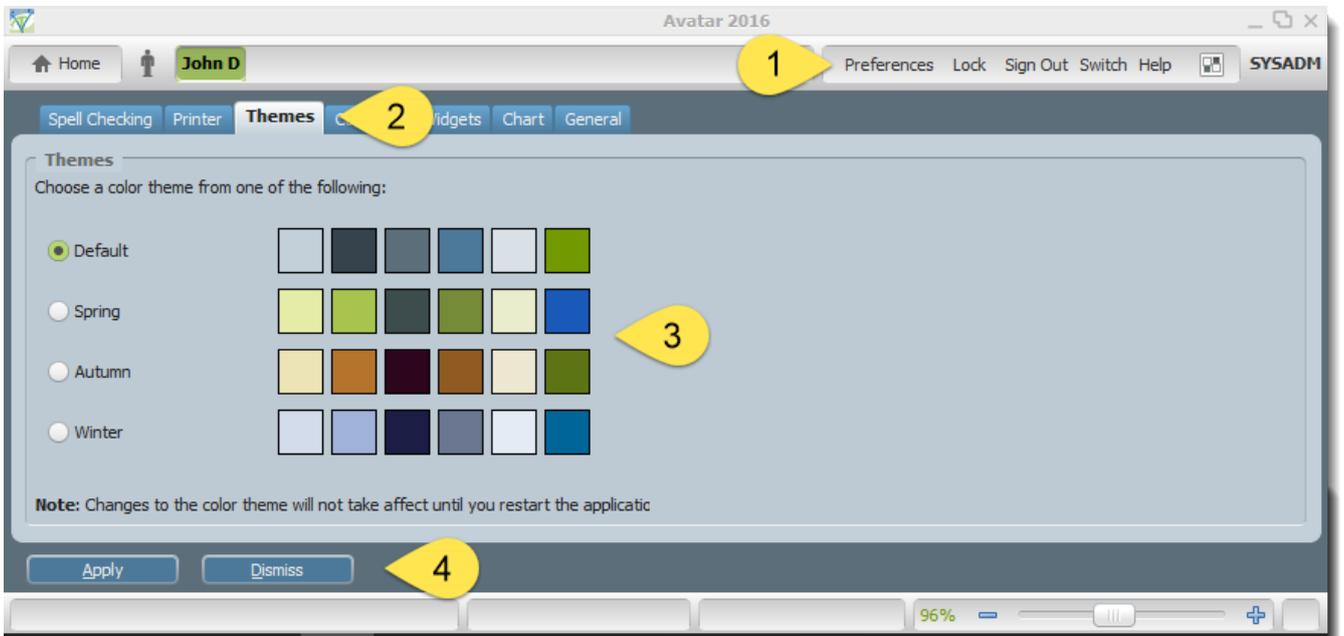
User preferences can be adjusted by the top buttons on the right side of the screen.



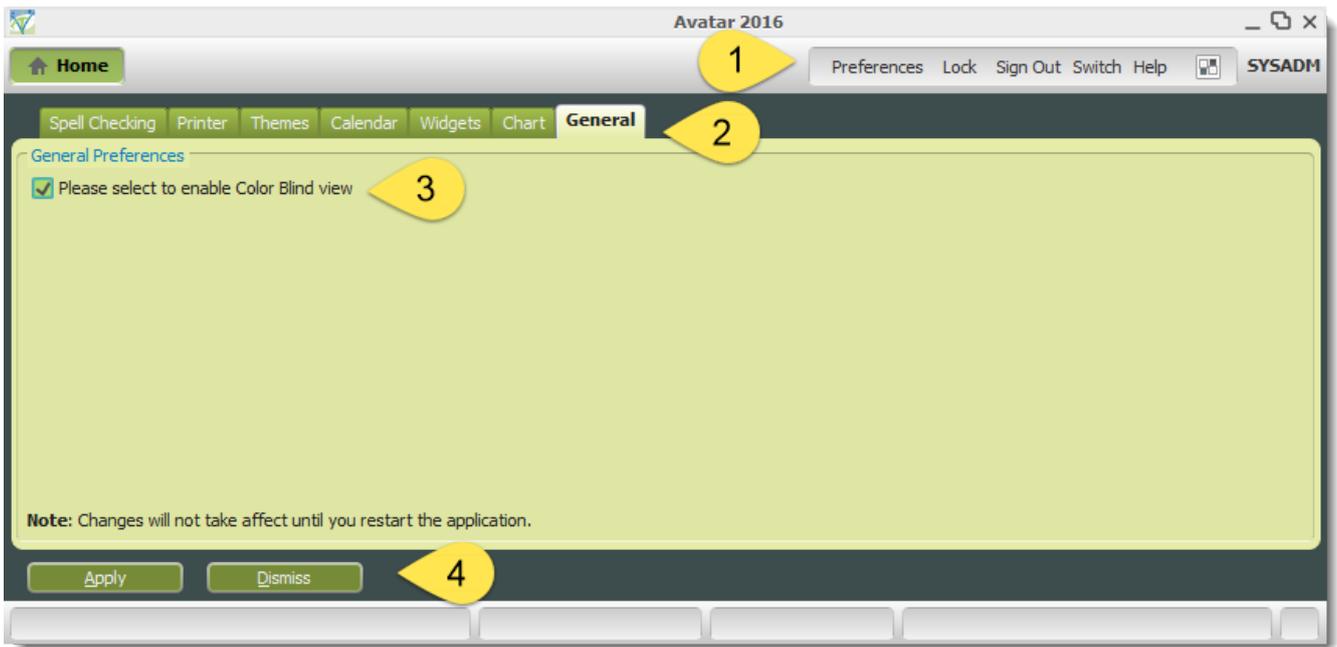
- **Preferences** - Opens a screen to allow adjustment of **Spell Check** options, **Printer** selection, **Themes** (colors), adding personal **Calendar** data to the Avatar calendar, **Widgets** (which will be discussed separately in another section), and **Charts**.
  - **Lock** - Allows locking the system without logging out. User will be prompted to enter System Code, Username, and Password to enter system.
  - **Sign Out** - Safely signs out user. A warning will appear if data in open forms will be lost.
  - **Switch** allows logging out of the current code and opening another, such as closing UAT and logging into **Live**. **NOTE - Only the LIVE system is to be used to enter client data, and is the only system code that will be used regularly.**
  - **Help** topics for Avatar.
- 
- **Customize Widgets** - Used to display information, including Staff/Clients, Forms/Data, Messages, etc. Views can be modified to include required widgets and to remove others. Widgets are used to open/view/enter/interact with data in Avatar. Widgets can be added/removed using the Customize Widgets function in either the Home View or Chart View.



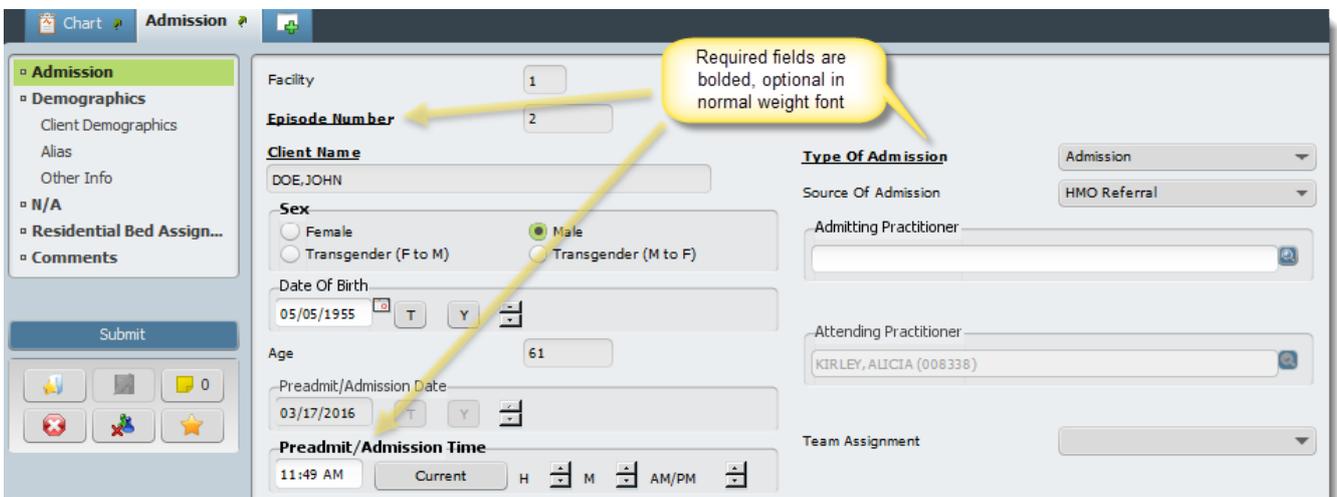
The Theme can be changed to use different colors for fields in most screens. To adjust Preferences, click the Preferences link at the top of the Home View screen, then select the Themes tab on the left. Select the color scheme you would like to use, then click Apply. The changes will take effect after Avatar is restarted (log out and close all Avatar windows, including web browser).



The following image shows a new Theme along with instructions to enable the Color Blind option. Click Preferences, then General. Select the check box to enable Color Blind View, then click Apply.



The changes will take effect after Avatar is restarted (log out and close all Avatar windows, including web browser). The color blind option will display all required fields that are usually red as **Bold text**.



# Tips & FAQ

Use the Lock feature when you wish to leave the system open but will not be present to avoid unauthorized use. It saves time by allowing the user to remain logged in and retains any users added to **My Clients**, **Recent Clients**, and **Recent Forms** for the session.

Add commonly used forms to your **My Forms** view to prevent having to search for them. They will always remain in this section after logging out.

## Technical Information

N/A

Posted by: [John Cookson](#) - Wed, Jan 20, 2016 at 7:16 PM. This article has been viewed 6464 times.

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