Netsmart

Using Document Capture

Overview

This is the Avatar link used for importing and scanning client-related documents into the system.

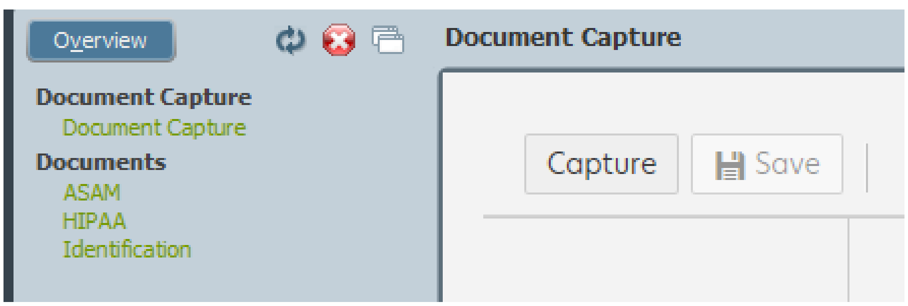
Before You Begin

Prerequisites: You must have the following items configured in order to use the document capture functionality.

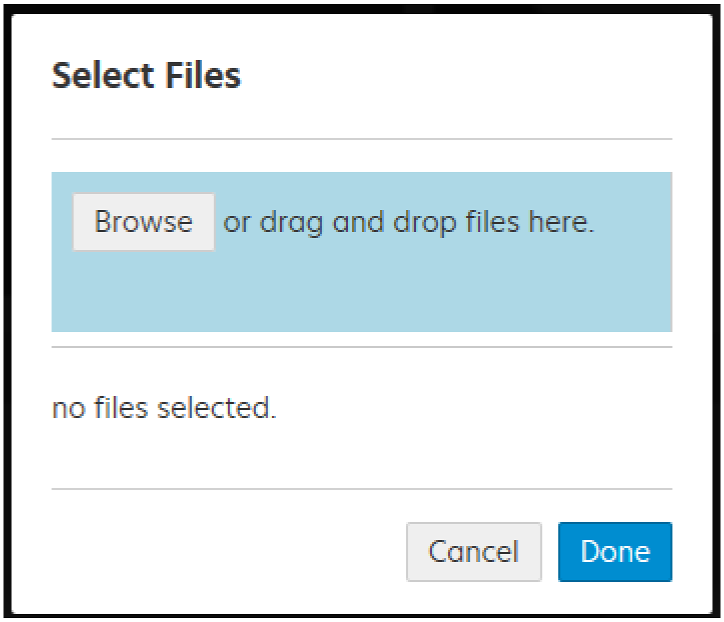
- Perceptive Content must be configured on the server.
- You must have access to **Document Capture** in the Client ChartView.
- You must have the ability to scan under the **Document Management** section of **User Definition** or **User Role Definition** forms.

Import a Document into Avatar

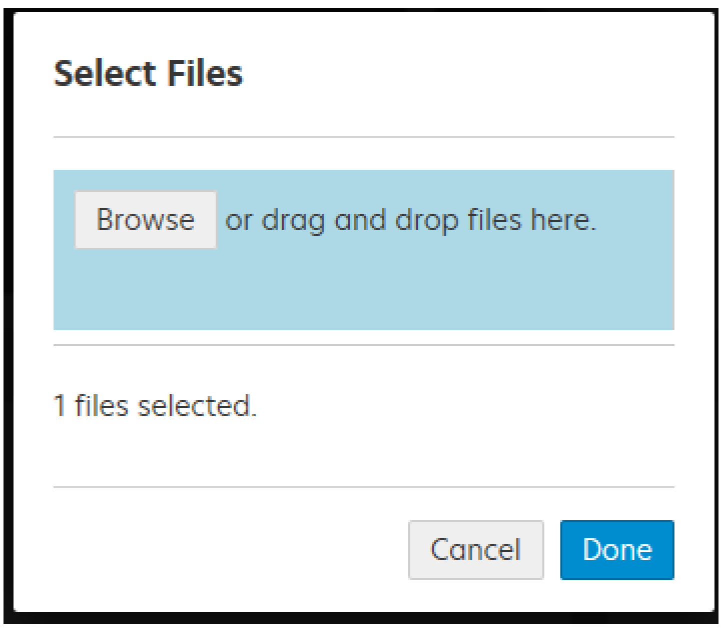
1. Navigate to a client's ChartView.
2. Click the **Document Capture** link.
3. When the message displays, *"How would you like to capture documents?"* click **Import**.
4. Select the appropriate episode from the **Episode Number** drop-down list and select **OK**.
5. Select **Capture** on the **Document Capture** screen.



6. In the **Select Files** window, click **Browse**.

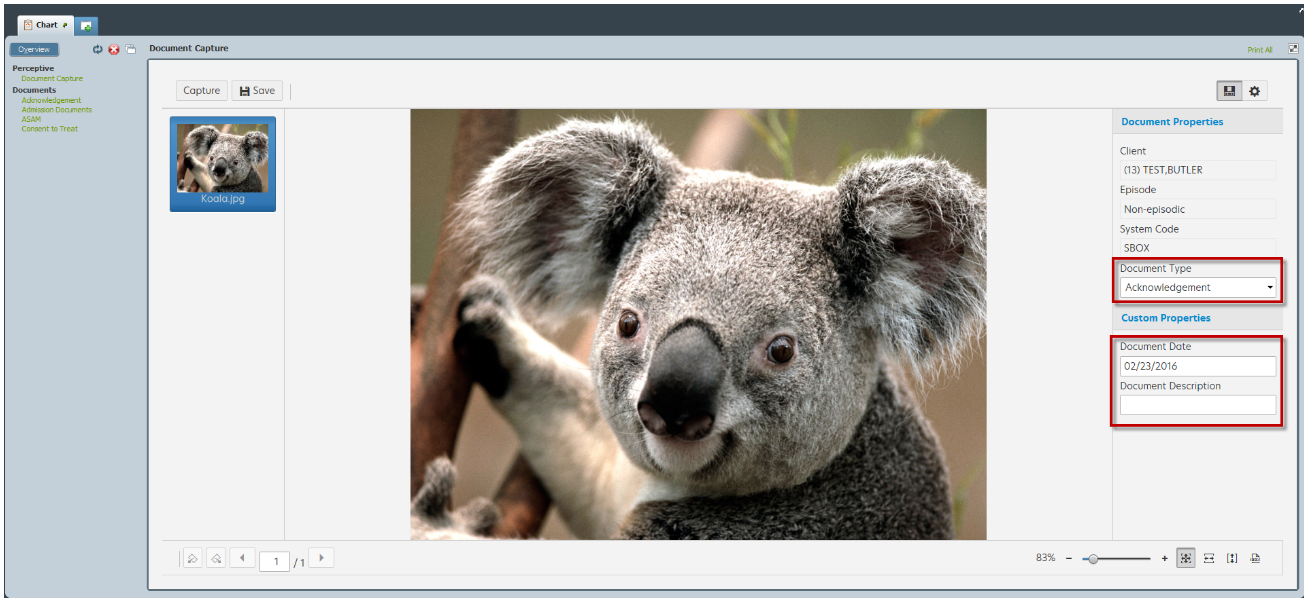


7. Navigate to the document(s) that you want to import and select **Open**.
8. Can drag and drop files into blue area as well. In the **Select Files** window, click **Done**.

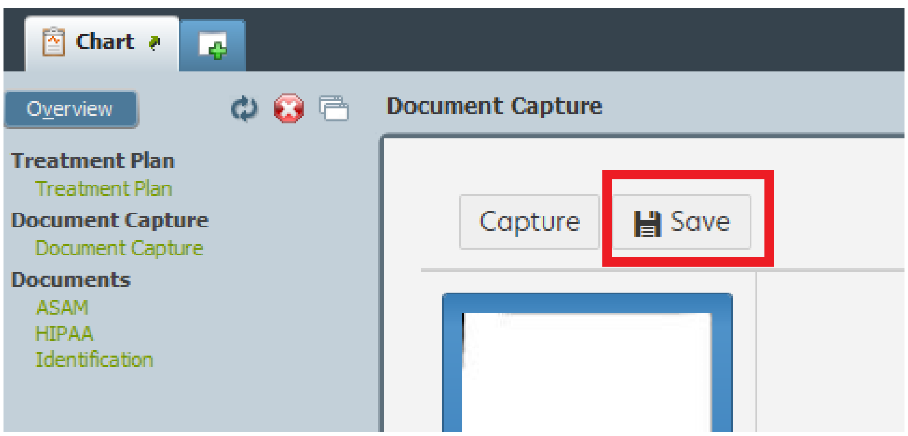


System result: The image displays in the **Document Capture** screen.**System result**: The image displays in the **Document Capture** screen.

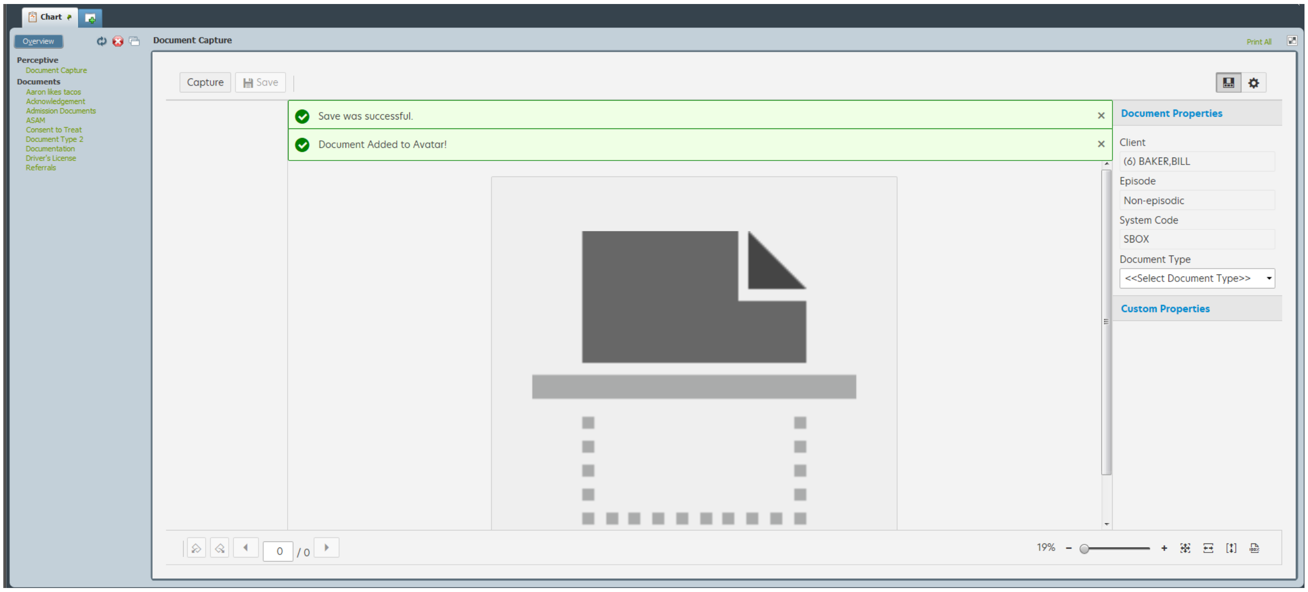
9. Select the correct document type from the **Document Type** drop-down list, located on the right side of the chart.



10. Update the **Document Date** and **Document Description if needed.**
11. Click **Save** in the top portion of the screen.



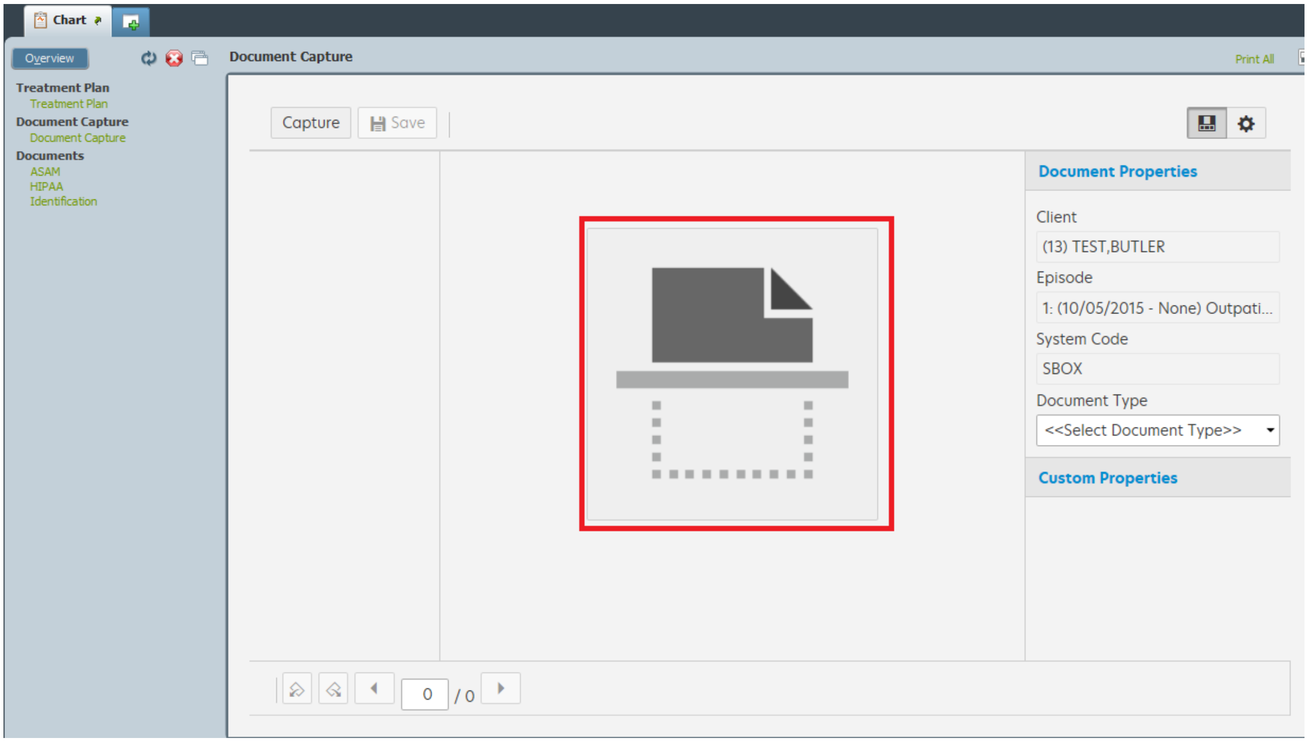
System result: After submission, the system returns you to the beginning of the **Document Capture** screen. Two green labels appear, one for *Save was successful*, and one for *Document Added to Avatar*.



12. Repeat steps 5-10 for capturing additional documents within the same episode.
13. Repeat steps 2-10 for capturing documents within different episodes.

Scan a Document into Avatar

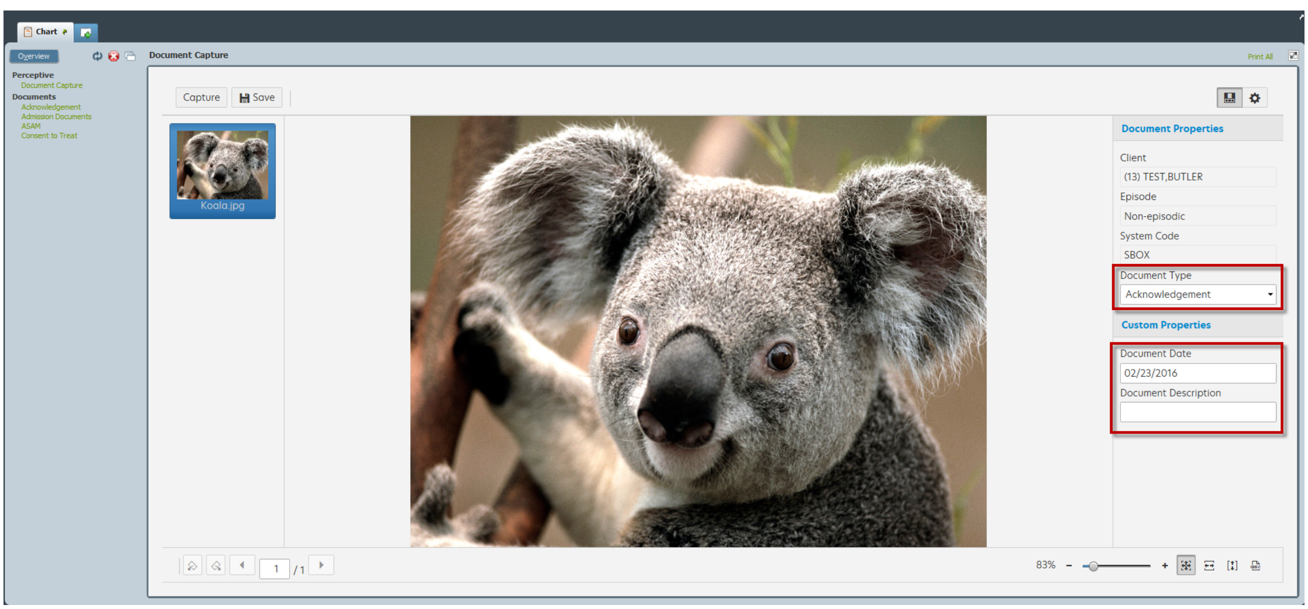
1. Navigate to a client's ChartView.
2. Click the **Document Capture** link.
3. When the message displays, *"How would you like to capture document?"* click **Scan**.
4. Select the appropriate episode from the **Episode Number** drop-down list.
5. Click the **Capture** button or scan image in the middle of the **Document Capture** screen.



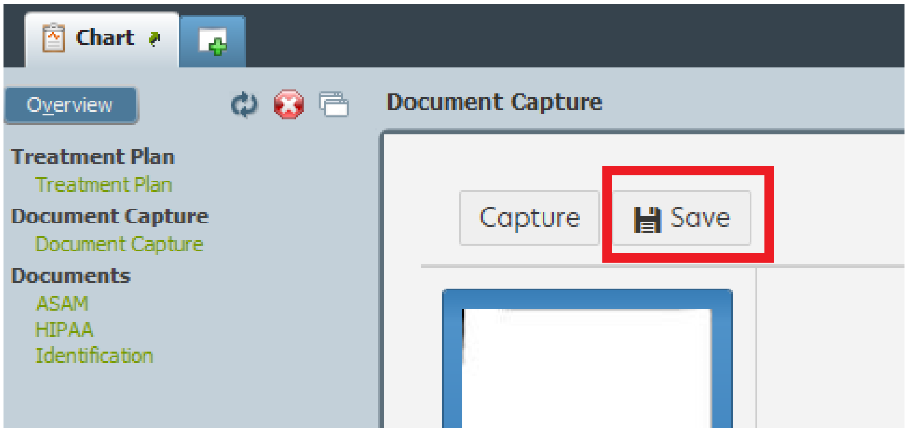
6. If a document is in the scanner, the scanner will scan the image when you select the **Scan Image** button in the middle of the screen.

   System result: The image displays in the **Document Capture** screen.

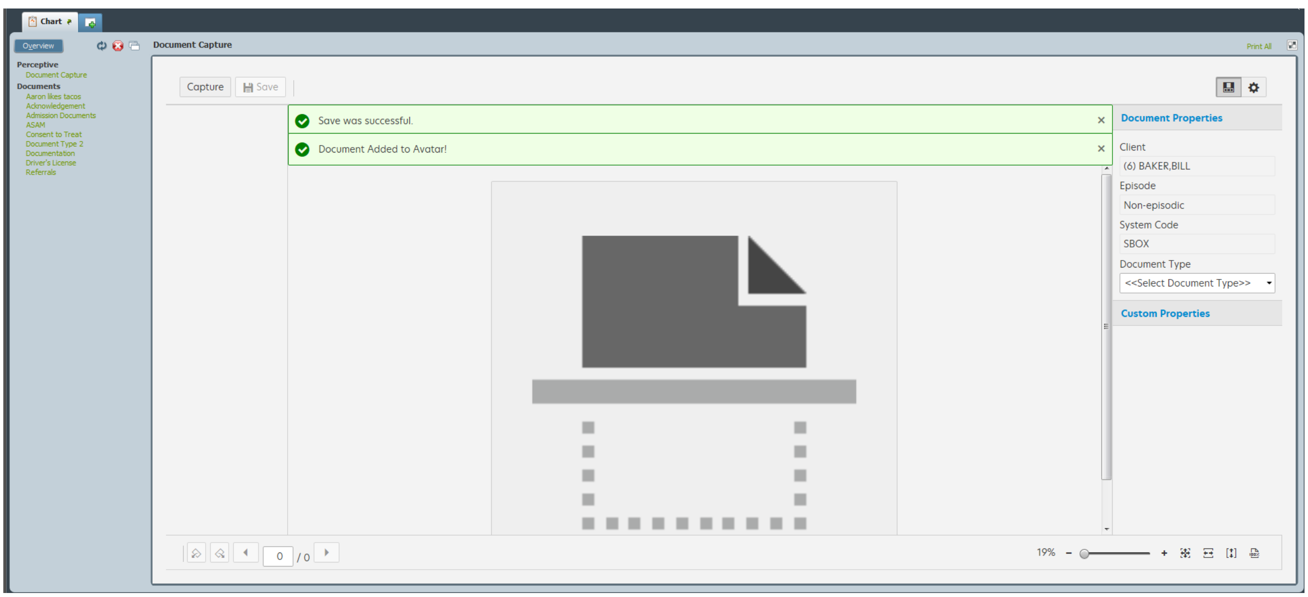
7. Select the correct document type from the **Document Type** drop-down list, located on the right side of the chart.



8. Update the **Document Date** and **Document Description if needed.**
9. Click **Save** in the top portion of the screen.



System result: After submission, the system returns you to the beginning of the **Document Capture** screen. Two green labels appear, one for *Save was successful*, and one for *Document Added to Avatar*.



10. Repeat steps 5-10 for capturing additional documents within the same episode.
11. Repeat steps 2-10 for capturing documents within different episodes.