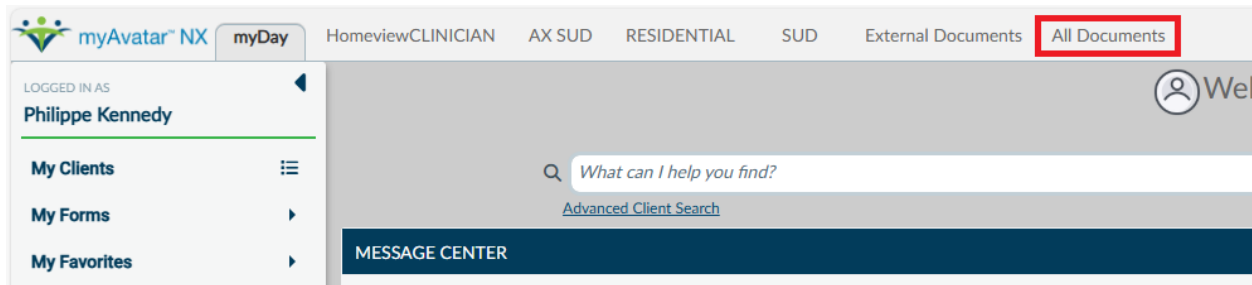


All Documents Console – Reference Sheet

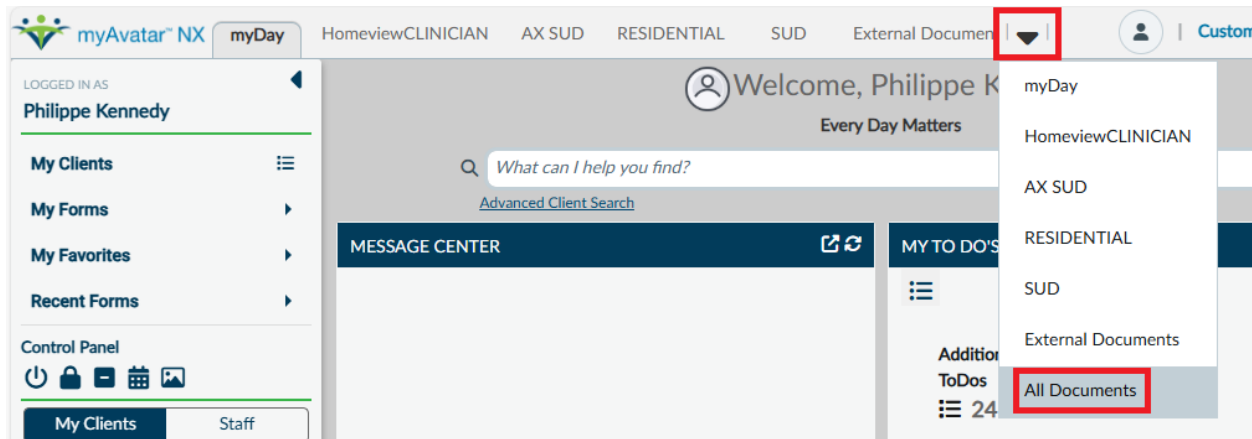
The All Documents Console provides tools for **viewing**, **sorting**, and **printing** documents that have been entered into Avatar (e.g., clinical forms, assessments, progress notes, and other documentation associated with a client).

Accessing the All Document Console

To access the console, click the *All Documents* link along the top of the screen.

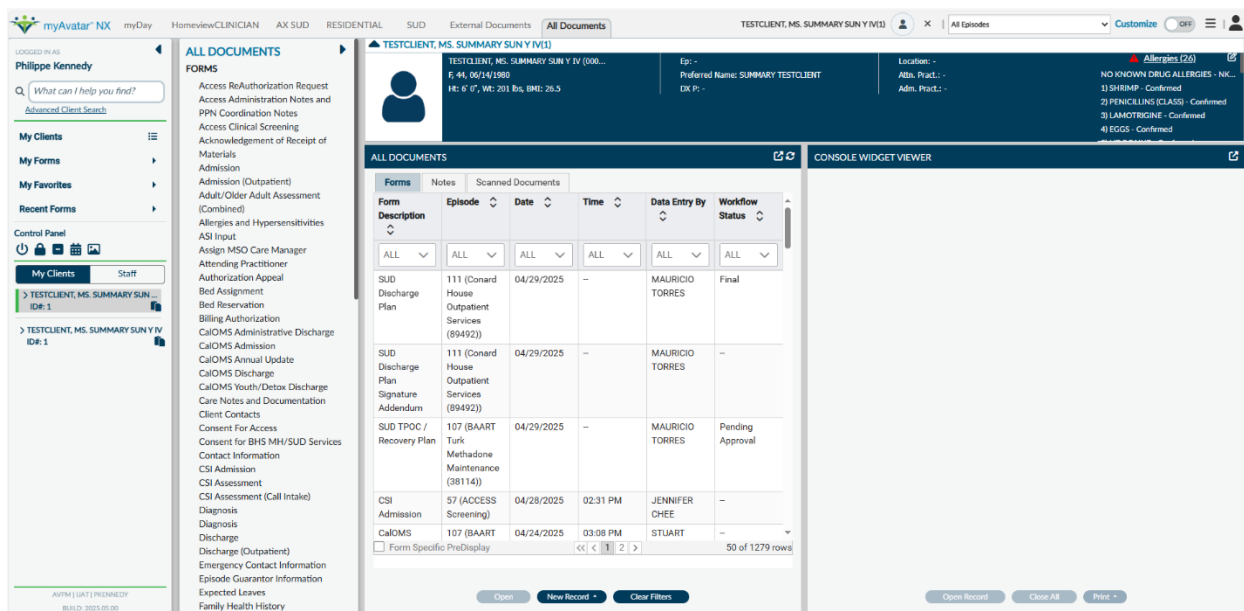


NOTE: If your screen is not wide enough to display all of the consoles that are available to you, you will need to click on the down arrow to view and select *All Documents*.



After clicking on *All Documents*, the console and its associated widgets will be displayed: the vertical All Documents navigation column on the left, the client banner along the top, the All Documents table widget, and the Console Widget Viewer (see screenshot below).

NOTE: The widgets will be blank until you select a client from your caseload or through the search field.



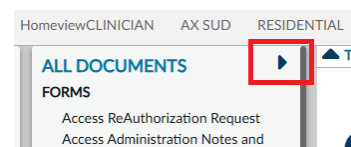
(Vertical) All Documents Navigation Column

The All Documents navigation column on the left side of the console provides a scrolling, alphabetized list of available forms divided into three categories: Forms, Notes, and Scanned Documents.

The *Forms* category lists the majority of available clinical and administrative forms, the *Notes* category lists progress note forms, and the *Scanned Documents* category lists forms that have been automatically uploaded into Avatar (typically documents that require signatures when finalized).

Clicking on a form in the navigation column will cause the All Documents (table) widget to the right to be populated with a list of all of the submissions of that form for the selected client.

You can minimize and maximize the navigation column by clicking the triangle in the top right corner of the column.



Client Banner

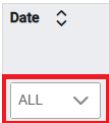
The client banner along the top of the console provides information about the currently selected client.

All Documents (Table) Widget

ALL DOCUMENTS			
Forms	Notes	Scanned Documents	
Form Description	Episode	Date	Time
ALL	ALL	ALL	ALL
SUD Discharge Plan	111 (Conard House Outpatient	04/29/2025	-

The All Documents table widget to the right of the navigation column displays lists of forms that have been submitted for the selected client. At the top of the widget are tabs corresponding to the three categories in the navigation column (i.e., Forms, Notes, and Scanned Documents). Clicking on any of the tabs will display lists of forms that have been submitted for the client in that category.

Below the tabs are different columns (e.g., Form Description, Episode, Date, etc.). A different set of columns will appear depending on the tab that is selected. You can sort the list of forms by clicking on any of the column headers (e.g, clicking on the Date column will sort the list from newest-to-oldest or oldest-to-newest).

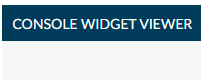


At the bottom of each column header is a drop-down menu that allows you to select from different, available options. For example, clicking the drop-down menu in the Date column will show a list of dates corresponding to form submissions. To list only those forms submitted on a specific date, click the check-box next to the desired date/s.

You can reset any filtering options you have selected by clicking the refresh button in the upper right corner of the widget.

Double-clicking on a form in the All Documents table widget will load it into the Console Widget Viewer to the right.

Console Widget Viewer



The *Client Widget Viewer* displays any form that has been double-clicked in the All Documents table widget on the left.

At the bottom of the widget are buttons to open, close, and print documents.

Use the *Undock* button in the upper right corner of the widget to open the viewer in a separate browser window.

NOTE: When first undocking the *Console Widget Viewer*, it will be blank. You need to navigate back to the main Avatar window and select a document from the All Documents table widget to load it into the undocked viewer.