Document Routing – Reference Sheet

A document routing screen will appear when you submit certain documents in Final or Pending Approval. Document routing is the process in Avatar NX used to finalize certain documents, if you are a LPHA, or to send them to a LPHA co-signer if you are a non-LPHA.

Forms Using Document Routing

The following forms use Document Routing:

1. Inpatient/Residential Progress Notes
2. Progress Notes (Group and Individual)
3. SUD Continuing Svcs Justification
4. SUD TPOC / Recovery Plan

Classifications Needing Co-Signers

LPHA: AMFTs, APCCs, ASWs, LCSWs, LMFTs, LPCCs, and similar licensed (and waivered) professionals do not require a co-signer and should always use the *Accept* button when finalizing documents.

Non-LPHA: Peer Support Services Specialists, CAODCs, or RAODCs can finalize progress notes using the *Accept* button but **must** use the *Accept and Route* button to have other forms co-signed.

Questions/Support

If you have questions or need support with document routing, contact the Avatar Help Desk at 628-217-5196.
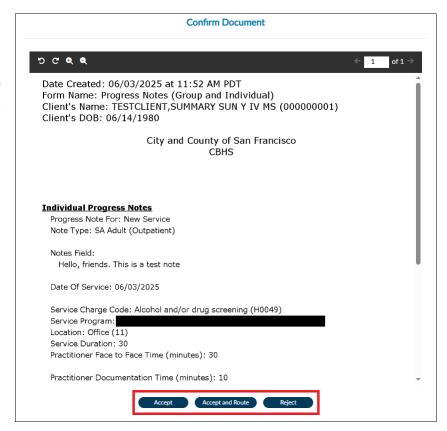
Based on your classification (e.g., CAODC, LCSW, MD, etc.), you may see up to three options: Accept, Accept and Route, and Reject.

Accept

The *Accept* button will only appear if you do not require a co-signer for the form you submitted. If you do not require a co-signer, choose this option to finalize your document.

Accept and Route

If you require a co-signer for the document you submitted, use the *Accept and Route* button to send your document to a supervisor for approval (see below for additional instructions).

Confirm Document

Date Created: 06/03/2025 at 11:52 AM PDT
Form Name: Progress Notes (Group and Individual)
Client's Name: TESTCLIENT,SUMMARY SUN Y IV MS (000000001)
Client's DOB: 06/14/1980

City and County of San Francisco
CBHS

Individual Progress Notes
Progress Note For: New Service
Note Type: SA Adult (Outpatient)

Notes Field:
Hello, friends. This is a test note

Date Of Service: 06/03/2025

Service Charge Code: Alcohol and/or drug screening (H0049)
Service Program:
Location: Office (11)
Service Duration: 30
Practitioner Face to Face Time (minutes): 30

Practitioner Documentation Time (minutes): 10

Accept   Accept and Route   Reject

Reject

If you review your document and realize that a correction needs to be made, use the *Reject* button to return your document to Draft.

Accept and Route Instructions

1. After clicking the *Accept and Route* button, a *Route Document to* dialog will appear. In the *Supervisor* field, enter the last name of your co-signer and then click on their name from the drop-down menu.

2. Click the *Add* button just below the name of the supervisor you selected to have them appear as an approver/co-signer.

   NOTE: Do not add more than one supervisor. If you accidentally add more than one supervisor or add an incorrect supervisor, click the *Cancel* button to return to the previous dialog.

3. Once you add the correct supervisor, click the *Submit* button. The document will appear on your supervisor's My To Do's widget, ready to be reviewed and co-signed.