



## ROUTING

### Tip sheet description

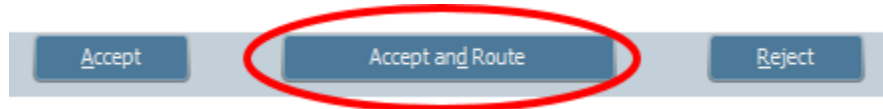
Routing Documents

### Try it out

1. Open Client
2. Document gets sent to person who needs to document on the form
3. In Avatar, you can route a document to one or more people to review the document and co-sign.

#### HOW DO SUPERVISORS AND APPROVERS WORK IN DOCUMENT ROUTING?

4. When you are done writing a progress note, click Final and then File Note, you have the option to Accept and Route the document to one or more cosigners. Clicking Accept and Route opens up the dialog box



shown below. Once routing has been set up, click submit

| Client Consents |                                |            |
|-----------------|--------------------------------|------------|
| Name:           | CLIENT TEST                    |            |
| ID:             | 2                              |            |
| Sex:            | Male                           |            |
| Date of Birth:  | 12/25/1978                     |            |
| Episode         | Program                        | Start      |
| 2               | Broomall Counseling            | 01/11/2018 |
| 1               | Broomall Adolescent Counseling | 12/22/2017 |

6. Select needed consent
7. Select Print
8. Sign consent via E-Signature pad or using mouse as indicated.
9. A laminated ring of cards are available at each area for clients to read as they are going through the consult.
10. A printed copy is available to the client.



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