AVATAR: Problem List User Guide

# Adding/Editing Items on the Problem List

1. Select a client by either:
	1. Clicking on the client name in your “My Clients” list
	2. Searching by last name or client number in the “Search Clients” field
2. In the “Search Forms” field, type “Problem List” and double-click on the selected form to open it



1. The Problem List launch form will open
2. Click on “View/Enter Problems”
3. The Problem List entry form will open



1. To change the status of a problem, double click on the Status and select from the drop-down list.
2. To add a new problem to the list, click on “New Row” at the bottom of the screen and fill in the row.
3. Click “Save”
4. You will be returned to the Problem List launch form
5. Click “Submit”

# Printing the Problem List

1. Select a client by either:
	1. Clicking on the client name in your “My Clients” list
	2. Searching by last name or client number in the “Search Clients” field
2. In the “Search Forms” field, type “Problem List” and double-click on the selected form to open it



1. The Problem List launch form will open
2. Select the Problem Status categories to print (e.g., “Active”)
3. Click “Problem List Report”





1. A report will generate listing the problems in the selected status
2. To export the report, click on the export icon at the top left of the page and save the report as a PDF or Word document
3. To print the report, click on the printer icon at the top left of the page.



