

Avatar Process Improvement - CalAIM Workgroup

Meeting Agenda

5/4/2023

9:00 AM - 10:00 AM

Meeting Purpose: The Avatar CalAIM Workgroup is a subcommittee of the Avatar Process Improvement Meeting, to address CalAIM related changes to Avatar forms, reports, and workflows. The workgroup reports back to the larger Avatar Process Improvement Meeting.

Mission: Make recommendations and decisions about CalAIM updates to Avatar, with representation from County Behavioral Health and Contract Partners, including line staff, supervisors, and management.

Webpage: Click here for meeting agendas and minutes. [Avatar CalAIM Webpage](#)

CalAIM References: [CalMHSA CalAIM Main Webpage](#)

CalAIM LPHA manual: https://www.calmhsa.org/wp-content/uploads/CalMHSA-MHP-LPHA_Documentation-Guide06232022.pdf

CalAIM trainings: <https://www.calmhsa.org/wp-content/uploads/CalMHSA-LMS-Instructions-5.24.22.pdf>

Get Involved!

- To add agenda items, contact is nancy.mast@santacruzcounty.us
- During the meeting, please use the raise hand function or the chat box if you have questions, comments, concerns.
- Review guidance documents on the [Avatar Webpage, CalAIM Subpage](#). New documents are being added weekly.
- Review test documents in [UAT](#).
- To request new projects, innovations or updates to Avatar, please feel free to share your ideas and suggestions in the Avatar meeting. You may also fill out and “Avatar Improvement Change Request Form” where you can provide details about your requested project.

<https://www.santacruzhealth.org/HSAHome/HSADivisions/BehavioralHealth/AvatarProjectRequestForm.aspx>

AGENDA ITEMS / MINUTES>>>

Announcements

1. **Next meeting – May 18, 2022, 9 AM – 10 AM;** (We meet every other Thursday morning at 9 AM.)
2. **Agendas, meeting minutes and QI Guides are posted on the [Avatar Webpage, CalAIM Subpage](#)**
3. **During the meeting, please use the raise hand function or the chat box if you have questions, comments, concerns.**
4. **Is there anyone that should be invited to this meeting? (Or should be removed from the invite list?) (If you don't tell us, we don't know!)**

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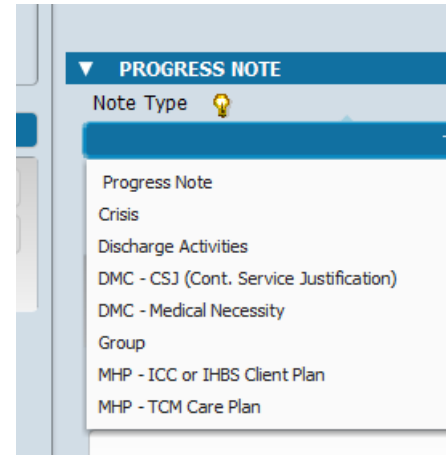
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New Agenda Items

1. Nancy - Due to updates in credentials behind the scenes, some users may not be able to pull up Progress Note Types that they need. If so, report to Nancy or IT department, who can fix.
2. X



Old Agenda Items

1. Signature Field on SC General Purpose Progress Note was removed per agreement from this committee 4/20/23.
2. Dave-CalAIM webpage - We need to re-organize and look at how we are saving things on the webpage. Discussion last time:
 - a. Silbiano
 - i. IT is reorganizing all county web pages.
 - ii. HSA is next. The look of the page will change. "More presentable and more attractive."
 - iii. See the Environmental Health page that has been reorganized. <https://www.sceeh.org/>
3. Overall, the group was very receptive to changing the look and feel of county websites to make them feel more "friendly."
 - a. Discussion Today:
 - i. X
4. Treatment Plan To Do List Notifications –
 - a. Discussion last time:

A screenshot of a 'My To Do's' table. The table has columns for Client, Action, Form, Sent, From, and Comments. There are two rows of data.

Client	Action	Form	Sent	From	Comments
Lil' T Tttfavreau	Review To Do Item	SC SUD Treatment Plan	04/10/2023	TEM...	SC SUD Treatment Plan / Plan de Tratamiento de Uso de Sustancias ' '. Is Due For Review On 01/09/2022
Hortense Tttmccr...	Review To Do Item	SC MH Episodic Treatment Plan	04/10/2023	TEM...	SC MH Episodic Treatment Plan / SM Plan de Tratamiento Episodico 'Initial' Is Due For Review On 08/30/2022

- b. General agreement to turn off, if possible, for the Episodic Treatment Plan.
- c. Decisions:
 - i. SC Episodic Treatment Plan: YES, turn off reminders.

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- ii. SC Short Term Treatment Plan: NO
 - iii. SC Sud Treatment Plan: Probably NO, but check, mainly with Janus. Sarah Tisdale: ENC SUD programs might want this turnoff also. We need consensus from Sud programs.
- d. **Discussion Today:**
 - i. pending implementation (Nancy)
- 5. **Problem List Changes and Classification of Historical Problems** - County is currently working on adding problem classification to problem lists for you. The problems that will be updated are those associated with currently open SUD programs. Please feel free to update on your own though, if desired. Also, if you find a problem that you think has been misclassified, please feel free to change the classification.
 - a. **Discussion Today:**
 - i. x
- 6. **Problem List Duplicate Problem Error** ticket out to Netsmart for cleaning up duplicate problems in problem list as it is making the problem list glitchy. [Update from NetSmart 5/1/23: NetSmart still working on problem. No solution yet.]
 - a. **Discussion Today:**
 - i. X
- 7. Potential Problem List Updates - Pending exploration with NetSmart
 - a. Prior Discussion
 - i. Add Date Identified to dx form so you don't have to then open Prob list to add this after completing a dx form. (Veronica)
 - ii. Make Date Identified question required (Dave)
 - iii. Sarah Tisdale: Have date identified populate back to Diagnosis form from Problem List.
 - b. **Discussion Today:**
 - i. X
- 8. Questions about sorting and filtering problem list when adding problems, to reduce clutter and make existing items easier to read. Nancy: Use sort and filter functions in form so that you do not have to look at inactive problems. Any questions about this?
 - a. **Discussion Today:**
 - i. X
- 9. **CalAIM Tools – Adult Screening Tool, Youth Screening Tool, Transition Tool**
 - a. For reference:
 - Adult Screening Tool: <https://www.dhcs.ca.gov/Documents/DHCS-8765-A.pdf>
 - Youth Screening Tool: <https://www.dhcs.ca.gov/Documents/DHCS-8765-C.pdf>
 - Transition Tool: <https://www.dhcs.ca.gov/Documents/DHCS-8765-B.pdf>
 - b. Feedback? Questions? (Access and Children's Gates?) Nancy and Gian have created non-episodic versions of these forms, with added logic and client demographic information to facilitate use of the form.

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c. Discussion Today

- i. x

10. **No-show service codes (Sarah Tisdale)** – Need for Encompass to have “M880” service code for client cancellations. This service code needs to be assigned to Encompass programs for use with progress notes (Encompass does not use Avatar Scheduling Calendar) This is for data tracking purposes, as they need a mechanism to track “client cancellations” vs. “no shows”. Sarah to request these updates from County IT.

- a. County is working on a project to monitor no-shows. Request will go to this committee. Note that service codes are changing with CalAIM and we need to keep this in mind when updating functionality related to service codes.
- b. Plan from last meeting was to have an off-line discussion to clarify what the needs are here. Did this happen? Is there still a need for this?

c. Discussion Today: Not Discussed

- i. x

11. Supervisor Reports - Need updating to reflect CalAIM Changes

- a. Supervisor Reports are less relevant because of CalAIM changes. Assessments and other items are no longer due on specific dates, but are to be done “as clinically indicated.”
- b. SUD Supervisor Report still not complete. (Maya Jarrow)
 - i. Says “test” on the label and in the report printout.
 - ii. Janus to send markup to Dave with changes needed. Did this happen?

c. Discussion Today

- i. x

12. Peer Support Services

- a. Jen Gosk - When will the certified peer support specialist be able to do Medi-Cal billing in avatar? This is a question for County Adult Leadership.
- b. Robert Annon (County Adults) - Peer support is now billable and there is a DHCS 40-hour training to certify. Looking into funding to help people take this, and expand this. How this will work has not yet been completely figured out.
- c. Claire Friedman (Sobriety Works) - Are we going to have to send people through an approved program through the county for peer support staff? There are outside organizations doing this certifying. Can County provide list of approved peer support specialist training? Perhaps Casey knows for SUD? Claire to check at CalAIM meeting what the new info is.

d. Discussion Today

- i. X

13. Bernadette Franzel - Question from Encompass supervisor around accepting several notes in Avatar. Supervisors are unable to cosign the notes as a batch, but have to sign each note individually, which is very time-consuming. Nancy - This is a known Avatar problem, which has happened before, and typically requires an update to Avatar to fix. Nancy will follow up.

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Parking Lot

1. **Combining "SMHS Assessment" with Residential Referral Form** - What information is needed to fulfill the needs for residential programs? Dave - This is part of QI work plan and tracking authorized services. Would like to have a workgroup. This can be moved to parking lot items.
2. **Assessment Tool "Children's Behavioral Health Intensive Support Services Eligibility Form"** Currently in the works with IT (Dave) Purpose is to bring in forms to get away from spreadsheets and word docs.
- 3.

CalAIM Overview and recap

1. CalAIM has ushered major regulatory changes to the California Medi-Cal system.
2. CalAIM is designed to streamline documentation and auditing practices by focusing on Fraud Waste & Abuse (FWA) to alleviate the excessive administrative burden and focus more on clinical best practice.
3. CalAIM employs a person-centered approach to improve access and coordination among the delivery systems.
4. Minor documentation infractions resulting in recoupments will no longer be deemed priority through the lens of FWA.
5. With CalAIM, providers can bill for legitimate collaboration of staff members in the same agency who hold different roles for the same client. This has been an area of lost revenue and staff frustration.

Attendance