

Avatar Process Improvement - CalAIM Workgroup

Meeting Notes

9/15/2022

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 Partner's front-line staff, providers, 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 CalAIM Webpage. New documents are being added weekly.
- Review updated SC Group Progress note form in [UAT](#).

AGENDA ITEMS>>>

Announcements

1. **For today, we will continue discussing progress note changes, shifting to the Group Progress Note once any final discussion is completed for the individual progress note.**
2. **Next meeting** – September 22, 2022, 9 AM – 10 AM
3. Agendas, meeting minutes and QI Guides are posted on the [Avatar Webpage](#), [CalAIM Subpage](#)
4. During the meeting, please use the raise hand function or the chat box if you have questions, comments, concerns.
5. We continue to focus primarily on CalAIM related items.
6. The GO LIVE date for the updated SC General Purpose Progress Note is postponed (from Sept. 19) due to an Avatar glitch we are seeing in UAT. A ticket has been filed with Netsmart.
 - a. Details: When you select “New Service” Avatar changes to “Existing Appointment.” And because there is no calendar appointment you cannot move forward with the note in UAT.
 - b. Nancy has filed a NetSmart ticket to fix.
 - c. Note that this does not affect anything in LIVE.

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7. Netsmart has created an Adult Screening Tool which we have added to UAT. Please review.
8. Dave and Nancy will be combining the two Avatar meetings. Expect a cancellation of the current meetings and a new invite to a new weekly series. Expect new email invitation for weekly meeting, two meeting are being combined into one.

General Discussion

1. Question about adding problem list elements to progress notes, like we used to do with treatment plan elements. (Steven King). Per county QI department (Sube Robertson):
 - a. Although your progress notes should reflect items in the problem list, you do not have to actually add problem list elements to your routine progress notes.
 - b. We encourage you to develop protocols and workflows to ensure that your progress notes address items in the problem list.
 - c. The QI Dept is available for problem-solving.
2. Question about billing different services in the same day. Per QI Dept (Sube Robertson): No changes to this per CalAIM. Continue to follow same procedures.
3. Comment about CalAIM changes and regulations seeming complex and not lean, which is a hallmark of CalAIM changes. Sube Robertson:
 - a. Talk to your supervisor about making your progress notes leaner.
 - b. This is a transition time and things should feel easier after a while.
4. Can we have a separate meeting for finance, for back end billing questions and changes? We need more information to explain to our team. (Meganne Parker) Sube Robertson: The only change with finance is the residential treatment change. Your billing team should no longer have to enter daily services.
5. Question about staff training regarding problem list. Nancy: There is no change to the problem list form at this time. It is the same problem list you are familiar with when you create a treatment plan. The difference is that you no longer have to create a standalone treatment plan (for most programs and services). Instead, you simply add a problem to the problem list and proceed with services. If you are providing Targeted Case Management (MH) or Care Coordination (SUDS), you will also need to write a progress note that describes your plan to provide these services and how these services meet the client's need. If the Problem List does change (this will be a slight change) the QI department will provide additional documentation.
6. Request for link to QI office hours. A link for the Friday morning sessions were sent to group.
7. Question about how to handle writing progress notes with the current progress note form in Avatar LIVE, specifically, what to do with the Presentation and Response fields we no longer need to use? Per County QI Dept (Sube Robertson): If you don't need to use these fields, simply write NA in the field.

SC General Purpose Progress Note Form (in UAT) – Updates Complete?

1. Lightbulb definitions and other changes have been added to UAT. Please review. **Not reviewed in meeting.**
2. **Progress note guidance** from the QI department is on the Avatar CalAIM webpage. Please review and get familiar with the changes.

SC Group Progress Note Form (in UAT) – Co-Practitioner has been added.

1. Co-Practitioner has been added back to the Group Progress Note form in UAT. Thank you to those who have been providing data for testing. To test:

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- a. Test duration with two practitioners. You can run a Service Activity Report after entering the group information to see if Avatar is calculating the billing accurately.
 - b. Look over cosmetic changes to the form.
2. A Break-out group to focus on group progress notes will be formed. The form is not used by many programs. Participants: Steven King (County SUD), Dagny Blaskovich (Volunteer Center), Jessica Stone (Janus), Erica Ortiz (County Accounting). We also need representation from Front Street, who does the bulk of groups entered on a daily basis into Avatar. Nancy to organize.
3. Discussion of creating another breakout group to look at reports.
4. A question was raised about when there is an LPHA and a Non-LPHA co-practitioner who writes the group note? QI Discussing this and will provide guidance soon.
5. Nancy did a quick demonstration of the Group Progress note Form as a refresher for everyone.
 - a. If you need more information, see this tutorial on the Avatar Webpage [here](#).
 - b. If you have ideas/thoughts on how to make the group progress note updates, please let Nancy know.
6. Description of group services from CalAIM manual:
 - a. For groups facilitated by multiple practitioners, a single progress note signed by one of the practitioners shall be used to document the group service provided. Progress notes shall contain the information as noted above and modifications and additional information as noted below.
 - b. Information about the specific involvement and specific amount of time of involvement of each practitioner in the group activity, including time spent traveling to/from the service and documenting the service.

Follow Up on Problem List Discussion from meeting on September 1

1. We cannot add the problem list to LIVE until Netsmart resolves certain issues related to sequestration of SUDS data. The problem list changes, as seen in UAT, show who updated the problem or who added the problem which may be a breach situation. Changes that Netsmart made to the problem list in UAT, creative situation where everyone can see the name of the person who added the problem and their credential. Netsmart may have a solution, but it will be a while and needs further QI discussion.
 - a. Please write progress note every time you do a problem list update, as the current problem list in LIVE does not track who edits the problem list. Once the progress note is updated in LIVE, there will be in note type, Problem List Update, that you should select when writing these notes. (Nancy)
 - b. Please work with staff to clean up client's problem lists. (Sube)
2. Question was raised - Can providers move in the direction of preparing to go LIVE with the problem list?
Answer:
 - a. The Problem List in LIVE is the same Problem List you are used to. The one in UAT is different than the Problem List in LIVE. It has some Netsmart updates that need to be discussed and potentially changed before the Problem List goes to LIVE. We do not have a date for this yet.
 - b. Currently, as outlined in QI guidance, you should **stop creating standalone treatment plans now, for programs that do not need them. Instead, simply update the problem list and write a progress note. You do not have to do standalone treatment plans for programs that no longer have this requirement.**

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- c. Please see QI guidance on problem list on avatar resource page.
3. Question about QI office hours and can people please get an invitation? (Jessica) Nancy will forward a meeting invite to the group after the meeting.
 4. Is the problem list automatically tracking who is touching the problem list? (Sube) Yes. (Nancy) If we are consistent with documenting Problem List updates in progress notes, this may meet the requirements for tracking. (Sube)

Other Items/Follow-up from meeting

1. Meganne Parker with Janus would like follow-up from finance teams as they have questions. They can reach out to Subé or Sara.
2. Jessica stone would like invite to Friday's office hours
3. QI Office Hours tomorrow morning (Friday) open to DMC and MHP.

Progress Note 3.0 (Future Updates/Wish List for Progress Notes)



Adding Start and Stop Time for DMC Documentation to the SC General Purpose Progress Note

Not discussed in meeting:

We may want to add Documentation Start Time and Documentation End Time to our progress notes, which is required for DMC notes.

What is the recommendation:

SAMPLE AT RIGHT SHOWS THE POSSIBLE ADDED FIELDS: New time fields to possibly be added are circled in red. (These do not currently exist on the form.)

If we added the above fields, we would also add Documentation Time, shown below.

A screenshot of a 'SERVICE INFORMATION' form. The form has a blue header with a dropdown arrow. Below the header, there are several input fields. The first field is 'Date Of Service / End Date for Weekly Summary' with the value '08/12/2022' and buttons for 'T' and 'Y'. Below this are two fields: 'Service Start Time' with the value '01:00 PM' and 'Service End Time' with the value '02:00 PM'. At the bottom, there are two new fields: 'Documentation Start Time' with the value '02:30 PM' and 'Documentation End Time' with the value '02:45 PM'. These two new fields are circled in red.

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<u>Face-to-Face</u>	<u>Documentation</u>	<u>Other Time</u>	<u>Total Duration</u> (minutes)
<input type="text"/>	<input type="text"/>	<input type="text"/>	<input type="text"/>

Unfortunately, these two fields do not talk to each other.

In other words, this....

SERVICE INFORMATION	
Date Of Service / End Date for Weekly Summary 08/12/2022 [T] [Y]	
Service Start Time 01:00 PM	Service End Time 02:00 PM
Documentation Start Time 02:30 PM	Documentation End Time 02:45 PM

Does not talk to this....

<u>Face-to-Face</u>	<u>Documentation</u>	<u>Other Time</u>	<u>Total Duration</u> (minutes)
60	15	0	75

Features and potential issues:

1. As shown above, the Start and End Time would not automatically populate the Documentation Duration field. (But the new field WOULD be added into the Today Duration automatically.)
2. We are looking into addition of these time fields with Netsmart.
3. These fields are not needed for most MH notes. Primary for DMC-ODS notes.

Discussion Points:

1. Reasons for this addition:
 - a. DMC-ODS requires start and end time of documentation (start and end time when writing the progress note). Currently, DMC-ODS staff have to type into the narrative portion of a note.
 - b. Most MH programs do not need these fields, except for potentially crisis notes. Because these are due within 24 hours of the service, this could help tracking timeliness of crisis notes.
2. Is there a way that documentation start time and end time would not be required for MHP notes? This would require expanding general purpose progress note? Best way would be to add another button/question within general progress note for-"SUD" note or "MH" note, which would be the only way to do this. This is a Follow up item.

What topic should be covered next? What are the priorities?

- I. DMC specific progress note text templates. Text templates are prewritten text that can be added to a progress note to help prompt the user. These are different than information in light bulbs.
- II. Universal screening tool

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III. Trauma screening tool

Action Items:

- I. **Finish Dave's Flyer with light bulb definitions to release as a training tools.**
- II. **Group Service Co-practitioners:** QI to make recommendations on best practices when two people provide group service, with different levels of licensure. For example, and LMFT and an MHRS do a group together.

Parking Lot

- I. **Trauma Screening Tool:** We are waiting for the state to provide this universal tool that all counties will be required to use.
- II. Mental Health Specialized intensive kids programs still have separate treatment plans; ICC, IHBS, TBS, IHSS. Stan would like more direction information on this. QI is waiting for state guidance on this.
- III. Discussion of SUDS Needs

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.

Attendees

Amanda Crowder (County SUDS), Andres Aguirre (Front St), Beloved Bolton (County QI), Claudette DeGodoy (County QI), Dagny Blaskovich (Volunteer Center), Dave Chicoine (County QI), Eileen Movshovitz (County AMH), Ellen Suski (County QI), Erica Ortiz (County Accounting), Eva Gomez (County SUDS), Gregory Goldfield (County SUDS)?, Jessica Stone (Janus), Joel Stiles (New Life), John Wasielewski (Sobriety Works), Laura Hyams (County CMH), Leo Torres (County SUDS), Madea Owen (County QI), Mary Zinsmeyer (New Life), Meganne Parker (Janus), Orpheus Buster Brown (New Life), Robert Annon (County AMH), Sara Avila (County QI), Sarah Tisdale (Encompass QI), Silbiano Cruz (County IT), Stephen King (County SUDS), Sube Robertson (County QI), Nancy Mast (County QI)