

# Avatar Process Improvement - CalAIM Workgroup

## Meeting Minutes

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](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](mailto: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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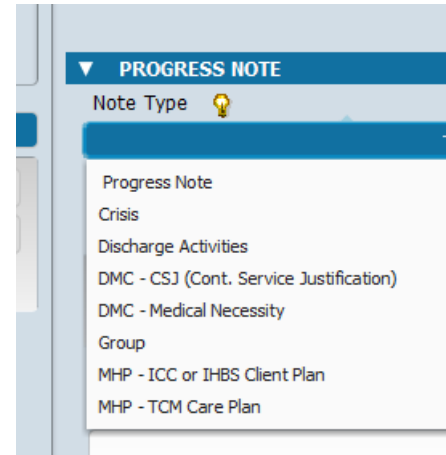
9:00 AM - 10:00 AM

### 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.

#### Discussion Today:

- a. Supervisor signature on form (document routing).  
Discussion about whether or not form needs this.
    - i. Nancy: Although the paper form has a blank for a supervisor signature, you would never have this on an Avatar form because Avatar has document routing, which allows one or more individuals to cosign a document.
    - ii. People were feeling as if this forms should not require document routing. Nancy: once a form is created, if it does not have document routing, this can never be added. We have seen this with other Avatar forms where after the fact, people want to add document routing, which cannot happen. Document routing does not cause problems, so it's best to keep it in. People cannot use it if they don't want to. This works just like our progress notes. People who want to or are required to have a cosignature route to the appropriate people, and others do not.
  - b. Date of assessment should be included in the form. Nancy: The paper form has this feature, and there is no reason why this would not be included in the electronic document. Most if not all assessments have an assessment date.
  - c. Form needs an item indicating whether or not the parent accepts the service that is offered. Nancy: SAA. This question is on the paper form.
2. The above led to a general discussion about procedures for developing a new document. (Silbiano, Jorge, Nancy). Discussion of having clearer procedures. Most important is that document specs are thoroughly developed and vetted before actual programming begins. Changing form design halfway through can be very difficult, and sometimes impossible. Projects need to be developed and prioritized based on sustainability. We need to be mindful of not only the design of the form itself, but which data items will be needed for future reporting. Discussion of appraisal of skill sets in IT and completion of projects. Jorge shared he is bringing into new developers, which should help with IT resources.
  3. Vince - Request for certain assessments to have reminders that go to clinicians My To Do's, like treatment plans. Nancy to investigate whether or not this is possible (probably not). In lieu of this not being feasible, reports can be built to reflect due dates. These supervisor monitoring reports can be updated. Specifically, Vince's request is for reminders for the following: PSC- 35, CANS/ANSA



### Old Agenda Items

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2. **Signature Field on SC General Purpose Progress Note was removed per agreement from this committee 4/20/23.**

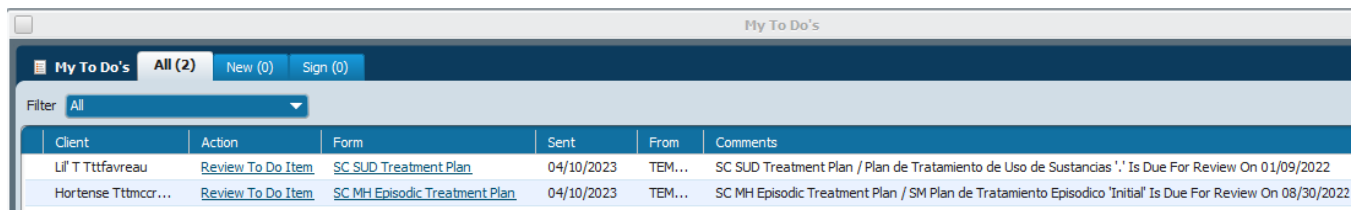
3. **Dave-CalAIM webpage - We need to re-organize and look at how we are saving things on the webpage.**

**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.scceh.org/>
- b. Overall, the group was very receptive to changing the look and feel of county websites to make them feel more "friendly."
  - i. **Discussion Today:**  
not discussed

4. **Treatment Plan To Do List Notifications –**

c. Discussion last time:



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

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

f. **Discussion Today:**

- i. **pending implementation (Nancy). Nancy reviewed in meeting**

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.

g. **Discussion Today:**

- i. not discussed

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.]

h. **Discussion Today:**

- i. not discussed

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- 7. Potential Problem List Updates - Pending exploration with NetSmart
  - i. 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.

### Discussion Today:

j. "Date Identified" Field and Problem List

Row ID	Problem	Onset Date	Date Identified	Date of Onset	Time of Onset
1	Substance abuse (SNOMED-66214...			01/01/2015	
2	Post-traumatic stress disorder, chr...			01/01/2016	
3	OCD (obsessive compulsive disorde...			02/01/2017	
4	Schizoaffective disorder, bipolar ty...			10/03/2017	
5	Mental retardation (SNOMED-9113...			01/01/1990	
6	Psychosis (SNOMED-69322001)			01/01/1990	
7	Poor impulse control (SNOMED-286...			01/01/1990	
8	Pica (SNOMED-14077003)			01/01/1990	
9	Anxiety (SNOMED-75408008)			01/01/1990	

- k. Field is required per CalAIM. Problem: There is no equivalent field on diagnosis form to populate this question. Is there a way to add this to the diagnosis form? Nancy: if field cannot be added to the diagnosis form, the submit date/time on the diagnosis form might suffice as a data point, at least in terms of audit compliance.

Diagnosis

7: Charis - Child Outpatient 05/06/2020 - Active

6: Sobriety Works - Adult IOT (0) 04/29/2020 - Active

5: LE - 0 12/16/20...

Sort/Filter: Type Of Diagnosis Primary Diagnosis

Submitted 05/21/2021 at 08:02 PM by NANCY MAST LMFT

Diagnosis

Date of Diagnosis: 05/06/2020

Time of Diagnosis: 12:00 AM

Type of Diagnosis: Admission

Primary Diagnosis: Recurrent depression (F33.9) (Major depres

Status: Active

Bill Order: 1

l.

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**Date of Onset field: per recent feedback from state at our most recent audit, Date of Onset is not required. Please add the state if desired, but it is not required.**

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?

m. **Discussion Today:**

- i. not discussed

### 9. CalAIM Tools – Adult Screening Tool, Youth Screening Tool, Transition Tool

- n. 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>

- o. 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.

p. **Discussion Today**

- i. not discussed

### 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.

- q. 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.

- r. 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?

s. **Discussion Today: Not Discussed**

- i. not discussed

### 11. Supervisor Reports - Need updating to reflect CalAIM Changes

- t. 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."

- u. 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?

v. **Discussion Today**

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- i. not discussed

### 12. Peer Support Services

- w. 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.
- x. 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.
- y. 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.

#### z. Discussion Today

- i. not discussed

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.

## 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. **Added in meeting - Avatar update projects: Need to look at all avatar projects and do appraisals of skill sets in order to see who can best do the projects, or what projects need to be delayed.**

## 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.

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### Attendance

Vince Stroth (County CMH), Silbiano Cruz (County IT), Sarah Tisdale (Encompass QI), Robert Annon (County AMH), Nancy Mast (County QI), Mary Zinsmeyer (New Life), Madea Owen (County QI), Karen Hackett (County Psychiatry), Julie Krokidas-Wooden (Sobriety Works), Jorge Fernandez (County IT), Jessica Nichols (Janus), Jace Freyman (Encompass), Dave Chicoine (County QI), Dagny Blaskovich (Volunteer Center), Claire Friedman (Sobriety Works)