

# Avatar Process Improvement - CalAIM Workgroup

## Meeting Minutes

9/7/2023

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 – September 21, 2023, 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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### Agenda Items

#### 1. Service Activity report

- a. The Service Activity Report in LIVE is not yet complete, and is not accurate.
- b. Daniel & Maria are revising the report in UAT.

#### c. Minutes/Discussion today

- i. Daniel shared the new SAR report that is currently in UAT, will be in LIVE soon. There is a new Practitioner category summary on the report. There was a question about PHI. This part of the report has no client PHI. It breaks down services by types of practitioners to provide a productivity overview for the team or workgroup. See example below.

**Service Activity Report**  
Practitioner Category Summary

9/7/2023

Date Range: 4/3/2023-4/7/2023

	Unique Clients	Number of Contacts	Total	Adjusted Total	Allowable	MediCal Eligible	Medi-Cal%	Cost	CalAIM Units
<b>April</b>									
Encompass - SSP-Adult Long Term Res	9	108	843	630	800	630	100%	17,494.41	79
EN-SSPRES									
APCC	5	21	139	139	139	139	100%	6,331.90	24
ASW	1	1	10	0	10	0	0%	0.00	0
Other	9	43	43	0	0	0	0%	0.00	0
RAC	6	22	81	81	81	81	100%	6,760.84	22
SUDRC	9	21	570	410	570	410	100%	4,401.67	33

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### 2. CalAIM coding changes (progress note service codes)

- a. Cheat sheets, FAQs and videos published by QI and are on the [Avatar CalAIM Webpage](#).
- b. Please give us feedback on the training materials & ways to improve. NTP does not have a code sheet & there are a lot of nuance things, some services that are particular.
- c. If you have questions, think that there is a code you should have that you don't, or see a code that you think should not be there, contact the QI department.

#### d. Minutes/Discussion today

- i. Dave reviewed the FAQ's that were posted to the SCBH QI CalAIM page, asking for feedback on training materials.
- ii. General discussion of training new staff. Are people directing new staff to this page? Is it useful? What does new staff training look like for different agencies and workgroups? Please let QI know what training is needed.
- iii. There is a new 2023 version of the CalMHSA documentation manuals - link on CalAIM webpage is broken, Nancy will update.

### CalAIM Resources

[Home](#)   [Training Resources](#)   [Forms & Reports](#)   [Information Notices](#)   [Meetings](#)   [CalAIM](#)

As the California Department of Health Services rolls out the CalAIM initiative, we will make changes to our Avatar system to reflect that. This page has resources relevant to those changes.

County QI Department CalAIM Information and Guidance

  

#### FEE FOR SERVICE CPT CODING FREQUENTLY ASKED QUESTIONS (FAQ)

- [Fee for Service DMC and MHP FAQ #1 6.27.2023](#)
- **NEW** [Fee for Service DMC FAQ #2 8.4.2023](#)
- **NEW** [Fee for Service MHP FAQ #2 8.4.2023](#)

  

#### DMC SERVICE CODE GUIDES (Drug Medi-Cal or Substance Use Treatment Programs)

- **NEW DMC QUICK GUIDE** [DMC CPT CalAIM Coding 8.4.2023](#)
- [Fee for Service DMC-ODS CPT Coding 6.28.2023](#)
- [Fee for Service DMC LPHA Service codes 6.27.2023](#)
- [Fee for Service DMC Med Support LPHA codes 6.27.2023](#)
- [Fee for Service DMC Non-LPHA codes 6.27.2023](#)
- [Fee for Service DMC Peer Services codes 6.27.2023](#)

  

#### MHP SERVICE CODE GUIDES: Mental Health Programs

- **NEW MHP QUICK GUIDE** [MHP CPT CalAIM Coding 8.4.2023](#)
- [Fee for Service MHP LPHA Service codes 6.23.2023](#)
- [Fee for Service MHP Non-LPHA codes 6.23.2023](#)
- [Fee for service MHP CPT Coding 6.23.2023](#)
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### 3. Update for Last Assessment Date Widget

EP #	Program Name	Status	Psychosocial	MSE	Diagnosis	CANS ANSA	ALOC	ASAM RE	TX PLAN	CSI	CalOMS
7	Charis - Child Outpatient	Need Update	02-02-2023	X	05-06-2020	05-31-2019	✓	✓	10-05-2020	X	✓
10	Encompass - Pre-Admit SEQ	Need Update	✓	✓	X	✓	X	X	X	✓	X
8	LE - 00044 MH COUNTY OUTPATIENT	Need Update	02-02-2023	X	07-01-2022	05-31-2019	✓	✓	09-25-2022	07-01-2022	✓
3	LE - 00440 MH ENCOMPASS OUTPATIENT	Need Update	02-02-2023	X	09-19-2017	05-31-2019	✓	✓	08-14-2019	02-01-2018	✓
5	LE - 00442 MH FRONT STREET OUTPATIENT	Need Update	02-02-2023	X	12-16-2019	05-31-2019	✓	✓	03-15-2021	X	✓
9	Pacific Clinics - Children Outpatient	Need Update	02-02-2023	X	01-14-2023	05-31-2019	✓	✓	X	X	✓
6	Sobriety Works - Adult IOT	Need Update	✓	✓	X	✓	X	X	10-01-2021	✓	X

#### a. Minutes/Discussion today

- i. Discussion of updating this widget as several items on it no longer have distinct due dates (CalAIM).
- ii. New ISS Assessment form needs to be added. Form is done at intake and then clients are reassessed periodically. Need to understand what the timeframes are to add to widget.
- iii. Discussion of including PSC-35, but this form is external, web-based and run by a different agency. It might not be possible. Need to check.
- iv. Even if certain items are no longer done on a routine basis, it might be good to leave the item on the widget and have the last date completed, as items like psychosocial assessment still need to be done when there has been change. (If assessment is not done when needed, then how can we know that services are still necessary and targeted toward the right things.)
- v. Dylan & Israel (IT) can help with this.
- vi. Dave will set up a meeting.

### 4. Assessment Tool “Children’s Behavioral Health Intensive Support Services Eligibility Form” (ISS Screening Form) - Form is completed, along with a “report” (printout) in UAT for review. Once approved, it can be moved to LIVE.

- a. Children’s BH wants to launch soon in LIVE but needs to work out how to introduce the new form and report.
- b. Dave – Discussion of aggregate/data reports.
  - i. Dylan Jones said parsing code that needs to be written becomes complex given large number of options.
  - ii. Need for Spreadsheet View type report
- c. Dylan is also working on some refinements to form per CBH/Meg.
- d. Minutes/Discussion today
  - i. Dylan demonstrated ISS Screening form in UAT.
  - ii. There are some questions that are too long on “therapeutic foster” section and are cut off in the chart view. The full text of these questions is available in the report (printout).

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- iii. Dylan to connect with Nancy on maximizing what can be seen in the chart view and other refinements to the form. Dylan and Nancy to meet with Meg to discuss needs.

### 5. Reports - Need updating to reflect CalAIM Changes

- a. SUD Supervisor Report
  - i. There are two supervisor compliance reports, one for DMC & one for MH. MH does not have annual psychosocial assessment due date any longer (psychosocial is due "as needed" per CalAIM). Are there documents that also no longer have a specific due date for SUDS?
  - ii. Reports can be changed, including fields, so they are functional for staff & supervisors.
  - iii. Janus sent Dave items about SUD report changes that are needed. Encompass SUD supervisors will provide feedback on changes that are needed.
  - iv. Four residential programs, ALOC must be done 72 hours of residential admission. Hours are harder for Avatar to calculate vs. days on reports. Would looking at 3 days or 2 days instead, work? Or possibly this might need a separate report.
  - v. For items that no longer have a specific due date, we might want to have the report at least provide the last date that assessment was done.
- b. **MH User Compliance Report (Dave)**
- c. **Managed Care Authorization Form (Dave)**
- d. **"Adult MH Report" (Dave)**
- e. **Minutes/Discussion today**
  - i. Need to include SUD Compliance Report in this discussion.
- f. **Request for new Managed Care Authorization Report (Dave)**
  - i. Report includes pre-auth for EDC, Telos, Casa Pacific. Need to add TBS to this as well.
  - ii. Meg-service authorization requests and presumptive transfer would be great to add to this report, Psych testing, eating disorder referrals eventually would be great to add.
  - iii. Dave-will invite Dylan into managed care meeting.

### 6. Use of "SMHS Assessment" to replace current Psychosocial Assessment SC

- a. Clinical standards committee was formed a while ago to discuss things such as assessment, what to include, how long it should be etc. and is an appropriate place to discuss these updates.
- b. **Minutes/Discussion today-not discussed in meeting**

### 7. Update Avatar Project List

- a. Report based on address - for homeless/unhoused folks.
  - i. A report based on their location would help. Would like to have an excel sheet that could be sorted.
  - ii. Report out from subcommittee? (Dave)
- b. Other New projects/new ideas?
- c. **Minutes/Discussion today-not discussed in meeting**

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8. **New today (Dave) Discussion of adding text templates (automatic text users can add to forms) to the SC General Purpose Progress Note for TCM care plan progress notes.**
  - a. Would be for the “Narrative Description of Services” field (the main text field).
  - b. Meeting participants liked this idea to have a template.
  - c. Nancy can add if people send her the text – Note that for text templates, we do not have text formatting (boldface, italics, etc...), templates are limited but can still be helpful. (Essentially, you are limited to whatever you can do on a typewriter.)

### Parking Lot

1. x

### 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

Jessica Stone (Janus Compliance), Jorge Fernandez (County IT), Julie Krokidas-Wooden (Sobriety Works), Karen Hackett (County Psychiatry), Kayla Gray (County HTS), Madea Owen (County QI), Mary Zinsmeyer (New Life), Meg Yarnell (CMH), Nancy Mast (County QI), Amanda Engeldrum Magana (PVPSA), Beloved Bolton (County QI), Bernadette Franzel (Encompass QI), Daniel Crews (County IT), Dave Chicoine (County QI), Dylan Jones (County IT), Israel Balderas (County IT), Jace Freyman (Encompass), Jennifer Gosk (Front St.)