

Avatar Process Improvement - CalAIM Workgroup

Meeting Minutes

2/8/2024

9:00 AM - 10:00 AM

Announcements

1. Next meeting is scheduled for 2/22/24, 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!)

AGENDA ITEMS / MINUTES>>>

1. **Assessment Widget Updates – For most items, there is not a due date anymore. How to update?**
 - a. Currently in the widget the red “X” means that it was never done and missing from the chart. A green check mark means it was done within the time frame. For most forms, Avatar is comparing a specific due date to the date the assessment was last completed, but for many forms currently (CalAIM) there is no longer a due date, and thus items should be listed only with the last date the item was completed.
 - b. Needed updates identified from prior meetings:
 - i. Add the new CalAIM assessment, using “last recorded date.”
 - ii. Psychosocial Assessment SC needs to be listed by last recorded date. (How is it currently set up?)
 - iii. Most other items also should be noted by last recorded date (is this the submit date?), except for a few items that still have a definitive due date, such as the CANS/ANSA. what about the SUD treatment plan?
 - iv. Possibly add the screening tool and ASAM. Dave will look into this.
 - v. Drop the color coding in the widget which is no longer needed for most items, because there is no longer a specific due date.
 - c. Action item: Dave will double check to see what the cutoff age is for the Adult versus Adolescent ALOC. Is it age 18?
 - d. Action item: Vince- Children’s would like PSC 35 assessment added into the widget, there is a date submitted for the PSC 35?
 - e. Discussion of new DMC-ODS “care plan.” We need more information about this item. for SUDs that has time frames.
 - f. **What other items need tracking in the widget?**

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- g. Action item: Dylan and Israel to coordinate modifying the widget. Need to nail down the requirements to load into dev opps. Nancy to meet with Dylan/Israel review requirements.

Last Assessment Date											
EP #	Program Name	Status	Psychosocial	MSE	Diagnosis	CANS ANSA	ALOC	ASAM RE	TX PLAN	CSI	CalOMS
5	County - Pre Admit Outpatient	Need Update	X	X	09-13-2023	X	✓	✓	X	X	✓
7	County - SUD Outpatient	Need Update	✓	✓	X	✓	01-23-2024	X	X	✓	X
2	County - SUD Pre-Admit	Need Update	✓	✓	X	✓	01-23-2024	X	X	✓	X
6	Janus - Peri Adult Long Term Res	Need Update	✓	✓	10-20-2023	✓	01-23-2024	X	04-10-2024	✓	10-20-2023

a. Discussion Today

- a. Israel Balderas from IT is working on the widgets.
- b. From prior discussion and today, the group agreed that there are no items anymore where it makes sense to use a due date. All items on these widget show the last recorded date.
- c. Several new items to add to widget were discussed to the extent that the group decided to split into three widgets – Adult MH, Children’s MH, SUDS
 - i. CANS (Children’s form)/ANSA (Adult form)
 - ii. ASAM Brief/Adolescent ALOC/Adult ALOC (SUD forms)
 - iii. Vince –IHBS, TBS, TFC authorization forms (Children’s) to this widget? Currently these forms are not in Avatar.
 - iv. PSC 35 form (Children’s form): Izzy working on whether we can add this item to a widget since is uses an external data source. Avatar updates that might allow this are being scheduled.
 - v. SUD Treatment plan (Sara Avila)

2. CalAIM Assessment Form

- a. “Peer Support Specialist” added as a list item to Type of Service question.
- b. Link needs to be added to charts.
- c. Form has been added to most user role’s and chart views. If there is someone who needs to be able to access or view the form and cannot, let us know.

Discussion Today

- d. Action item: Dylan - Internal links to be added to form (in the actual open form on the left): CANS/ANSA, Risk Assessment. to CalAIM assessment as well (Dylan will do).
- e. Nancy - It's been added to user roles, so everybody should have access to it. If you do not have access to it, please let myself or one of the members of the IT department know and we can investigate.

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f. Discussion Today – Type of Services question

The screenshot shows a form titled "Type of Services" with a dropdown arrow. Underneath, there is a section for "Specialty Mental Health Services" which contains two columns of checkboxes. The first column includes: Mental Health Services, Day Treatment Intensive, Crisis Intervention, Adult Residential, Psychiatric Health Facility Services, Therapeutic Behavioral Services, Psychiatric Inpatient Hospital Services, and Intensive Care Coordination. The second column includes: Medication Services, Day Rehabilitation, Crisis Stabilization, Crisis Residential, Intensive Home-Based Services, Therapeutic Foster Care, and Case Management Servi..

- i. Dave would like to change in the “types of services” questions, the list item, “Case Management Services” to “Targeted Case Management”.
- ii. Meg – remove the following from Type of Services (they use a separate form) Action item (Dylan?)
 1. Intensive Care coordination
 2. Intensive home based services
 3. Therapeutic behavioral services
 4. Therapeutic foster care do not need to be on here under “types of services”,

3. The new “Medical Note” form (a new med note type for county prescribers only) was added to the chart view so everyone can see the information. This new note will not replace the SC Med Service Progress Note. County prescribers may use either note for now. Contractor prescribers and other medical staff will continue to use the older SC Med Service Progress Note. Discussion Today:

- a. Nancy- I added the medical note for everybody who needs it. If you do not see it in your chart view or you do not have access to the form and you think you should, let me know.
- b. Nancy – the new medical note is only used by County prescribers, although some may be still using the older SC Med Service Progress Note. So, when you are looking for medical information from a psychiatrist in your client's chart, you will have to click on both note types.
- c. Dave-medical note does not come up on the “services history widget.”
- d. Action item: Dylan to look into this & add item to widget.
- e. Note that contract medical staff will continue to use the SC Med Service Progress Note.

4. Progress Note Templates

- a. Information notice was sent for these two new progress note templates.
 - i. NEW Problem List, Review, Add or Remove Template
 - ii. NEW MHP – TCM Care Plan Goal Statement Template

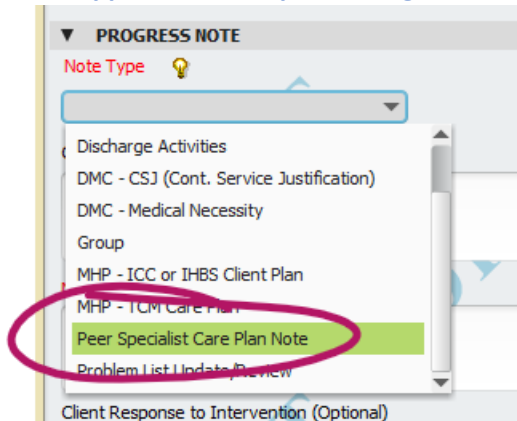
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- b. Peer Support Text Template along with the new note type has been added.



- c. Other progress note templates that are being worked on:

- i. Enhancements for SUDS
- ii. Feedback on billing codes

d. Discussion Today - Peer Specialist Care Plan Note (Jessica) - Request for guidance around timelines for peer support care plan note, and billing/service codes.

e. Action item (Q team Dave & Shelly) – To look into this, regs may not be clear on timeframes. (Dave - there may not be any specific time frames per state guidance.)

- 5. SRADL – Continue discussion of SRADL updates and potential ability to revert to draft. The method by which this permission will be provided to clinical supervisors and other clinical line staff potentially, needs to be worked out. Currently, only those with broad clerical access have this ability, which we do not want to give to everyone. There was general discussion to clarify request and parameters.
- 6. Some of Screening Tool Forms and proposed updates to forms

Search Forms

screening tool

Name	Menu Path
Adult Screening Tool (Non Episodic)	Avatar PM / Assessments
Youth Screening Tool (Non Episodic)	Avatar PM / Assessments
Adult Screening Tool Report	Avatar PM / Reports
Youth Screening Tool Report	Avatar PM / Reports
Screening Tool Outcomes Report	Avatar PM / Reports

- a. Action item: Dave – Screening tool outcome (for MHP use only) needs to have more options added “declined services.”

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- b. ADD box: “declined services” under “screening tool outcome” in the clinical disposition section (Dylan to do - add dictionary item and a box here).

- c. Discussion Today

- i. Dylan completed this.
- ii. Dave-want to make sure people know about this, especially access folks.

7. ISS/ICC Form Updates (Vince/Dylan)

- a. How to enter the ICC coordinator in the ISS screening form if the client is already receiving ICC services through FCS? New question, “FCS Coordinated”?
- b. Dylan to clarify current routing and build updates in UAT.
- c. Planning on demo for the MHP Children’s UR in Feb
- d. Add a new list item for an existing question - Screening Tool Outcome
- e. QI will host Children’s UR in February to introduce so all providers that need it have it.

- f. Discussion Today

- i. Dave – Forms needed and will be presented to Children’s Behavioral Health on Tuesday, 12/13/24.
- ii. Vince- Request for updated templates inform. Vince will draft updated text/language.

Parking Lot

1. (Dave) New Managed Care Authorization form & report - Some services require authorizations; this form would be used to authorize times of service. Report includes pre-auth for EDC, Telos, Casa Pacific. Need to add authorization for TBS, ICC, IHBS, SUDs Residential (RTARs), inpatient stays to this as well. Still in UAT testing. Discussion from last meeting: Follow up for Dylan-will this report send reminders in avatar when authorization is due? Meg from last meeting-service authorization requests and presumptive transfer would be great to add to this report as well as psych testing & eating disorder referrals eventually would be great to add.
2. (Jen Gosk) ACES Awareness Tool

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.

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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

Nancy Mast (County QI), Robert Annon (County AMH), Rosalie Evans (Encompass), Sara Avila (County QI), Shelly Barker (County QI), Veronica Campos (Janus), Vince Stroth (County CMH), Amanda Engeldrum Magana (PVPSA), Andres Aguirre (Front St), Bernadette Franzel (Encompass QI), Daniel Crews (County IT), Dave Chicoine (County QI), Dylan Jones (County IT), Grace Saldivar-Napoles (County AMH), Israel Balderas (County IT), Jennifer Gosk (Front St.), Jessica Stone (Janus Compliance), Johanna Jefferies (County AMH), Karen Hackett (County Psychiatry), Madea Owen (County QI), Mary Zinsmeyer (New Life), Meg Yarnell (CMH)

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%20Documentation-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.