

Avatar Process Improvement Meeting Agenda

10/7/2021

9:00 AM - 10:00 AM

Meeting Identity and Mission: Inclusive, collaborative, agenda driven Continued Process Improvement meeting focused on new state and federal requirements, as well as improving client care and staff experience.

Opportunity to: Share both our voice and needs to impact processes & procedures, create and modify forms and workflows, develop reports and widgets

Commitment to: Bring information back to the groups we represent, gather input and test current projects to ensure they meet our needs

Meeting Website: [Avatar Resources / Meetings](#)

Get Involved!

•To add agenda items, contact David.chicoine@santacruzcounty.us

•Housekeeping items – Please use the raise hand function or the chat box if you have questions, comments, concerns.

AGENDA ITEMS>>>

What's going on?

TIME: 5 minutes

STAFF: Nancy

1. Nancy Mast facilitating today for Dave Chicoine who is on vacation
2. Linda Cosio will take notes

Project Status and Updates

1. **DMC-ODS Pre-Admit Workgroup Report Out** STAFF: Casey Swank TIME ALLOTTED: 10 mins
 - a. **They decided on Pre-admit but want to simplify the workflow.**
 - b. **Thinking about time it takes.**
 - c. **Brief ASAM, rfl data**
 - d. **Currently all on ppr so it's fast [per her]**
 - e. **Creation of avatar consent for this, brief ASAM, refls, no dx, no LPHA involvement. Replicating current process.**
 - f. **She is going to send out something about this. Sara should know.**
2. **NEW REPORT! Test MH User Compliance Report** is now in LIVE. STAFF: Nancy TIME ALLOTTED: 10 mins
 - a. The report was developed so that line staff have the ability to print their own compliance report without waiting for their supervisor to print for them.
 - b. A new item was added. It notes whether the "Treatment Plan Offered..." Question on the treatment plan was filled in. Because the question is not "red" people forget often to fill it in. This is a Medi-Cal

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requirement and noted in our last state audit.

The screenshot shows a date selection interface. At the top, it says "Date client was offered a copy of the Treatment Plan/Fecha en que se le ofrecio una copia del plan de tratamiento". Below this, there is a date input field containing "10/04/2021" with a small calendar icon to its right. To the right of the input field are two buttons: "Today" and "Yesterday". Further to the right is a dropdown menu icon.

- c. Other Reports to consider for this: SUDS Supervisor Compliance Reports, Caseload Report, Progress Note Aging Report, Progress Note Aging Summary. Service Activity Test. Per Sara Tisdale rpt is not accurate right away. Doesn't do the math right away. The rpt also needs to have the final.
- d. This devolved into a discussion about doing groups with clients from more than one program. Sara insists that there is a problem with group count breaking with some programs. She says it's a problem with over and under 21 svc code.
 - i. CL nervous about programs w/ different LOC
 - ii. Discussion of if u have under and over 21 could you do two separate groups. Asked CL and she rambled about this. Cannot do 2 LOC's but if same LOC then you could. S/L she thinks that it's OK if same LOC.

3. Psychosocial Assessment

STAFF: Nancy/Robert TIME ALLOTTED: 10 mins

- a. Medical Necessity Statement is required
- b. Adding a MSE question, and a diagnosis question/field. QI needs to discuss before bringing this to the committee. Specifically, may non-licensed staff enter and MSE and/or diagnosis, and then have supervisor final/submit document?

4. Treatment Plan Service Frequency

STAFF: Nancy TIME ALLOTTED: 5 mins

- a. This came up in the most recent state audit. Auditors questioned services being on a treatment plan, that were not being provided or provided very infrequently. For example, case coordinator adds rehab counseling to plan, but this service is not being provided.
- b. Midyear review of plan?

5. Client Alerts Cleanup

STAFF: ? TIME ALLOTTED: 5 mins

- a. Reception workflows? (Flor)
- b. Other workflows?
- c. Reports to help with cleanup?

6. Updating Appointments Erases Data

STAFF: Flor TIME ALLOTTED: 5 mins

- a. Problem with status of appts getting deleted if someone else does a second status update (Flor Perez, County Reception): We need a way to document multiple notes by different people about an appt. Also, if a client cancels, we have no way of having verification that the client cancelled because the appt just disappears.

Action Items

TIME: minutes

1. NEW ACTION ITEM

Parking Lot

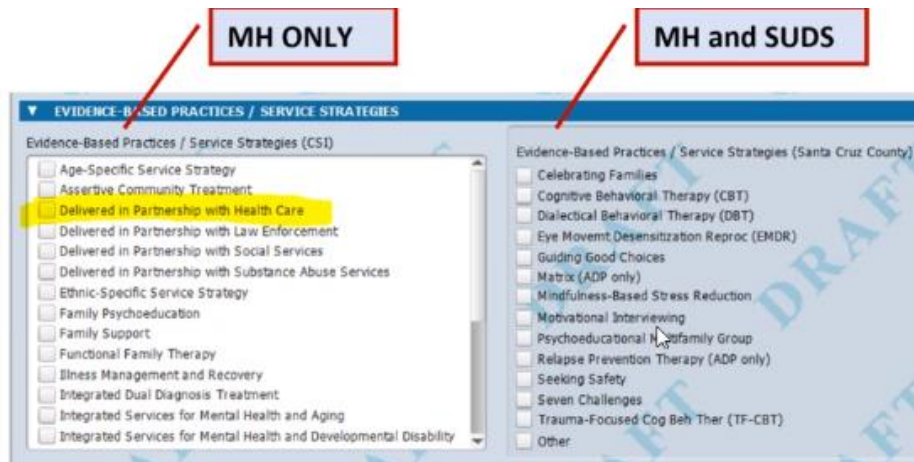
1. **TELECARE PHF ACCESS (Robert):** Would be especially helpful for line staff to know if their client has been hospitalized. Gian to bring up in meeting with Netsmart and HIE to see about this being part of the external documents console.
 - a. **CL – We are doing real time retro review.**

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- b. We still go to the PHF meeting. Workflow.
- c. Tasking Robt w/ making sure this info gets to the right ppl. He's actually thinking about it and having the supervisor. He's asking about having just the supervisor doing that.
- 2. Progress Note Aging Report: w/Client-level parameter (Michael Garcia)
 - a. Gian says that David/Adriana wanted to add a client to the parameter.
- 3. CSI Data Cleanup
- 4. Enrollment Process / AVATAR intake forms: Do we use it or eliminate it?
 - a. Claire: ??Discussion of creating a form that provides permission for giving a referral to other resources??
- 5. Sticky Notes: Issues with sticky notes both disappearing when you don't want them to, and hanging around when you don't want them to.
 - a. Robt? W/ conserved clients. Sticky notes at the bottom of the list might not be visible bc there is not enough room.
 - b. Possibly having an expiration date on certain types of warnings. Flor is culling currently.
- 6. Evidence Based Practices (EBPs) STAFF: Claire
 - a. Topic: Use of evidence-based practices in the General Purpose Progress note to meet the state requirement of Documenting Coordination of Care –DHCS for MH requires demonstration of coordination of physical and mental health care.
 - b. Table for now due to audits?



Next Meeting

Day/Date: Thursday, 10/21/21

Time: 9 AM – 10 AM

Attendees

Attendee