

# Avatar Process Improvement Meeting Agenda

12/16/2021

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, complete the AVATAR request form; contact is [David.chicoine@santacruzcounty.us](mailto:David.chicoine@santacruzcounty.us)

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

## AGENDA ITEMS>>>

### Introductions

TIME: 5 minutes

STAFF: Dave

1. Facilitator: Erica Ortiz
2. Skip December 30, 2021, meeting. Next meeting – **January 13, 2020**
3. Introductions: name, program

### Project Status and Updates

1. **NEW REQUEST:** Remove the “Referred to MD...” question from the Psychosocial Assessment  
STAFF: Dave/Joanna Moody TIME ALLOTTED: 15 mins

Client has been referred to MD for medication evaluation and/or to rule out physical health factors, which may impact client's functioning

Yes

No

Describe result, and any pertinent information about treatment



- a. Background: CMH got disallowance for checking “no.” When you check “no” the text field is disabled, therefore you cannot further describe what is happening.
- b. Decision: Consensus by committee was to enable text field (“Describe result...”) for both Yes and No answer. Per QI, field should also be red/required in either instance since

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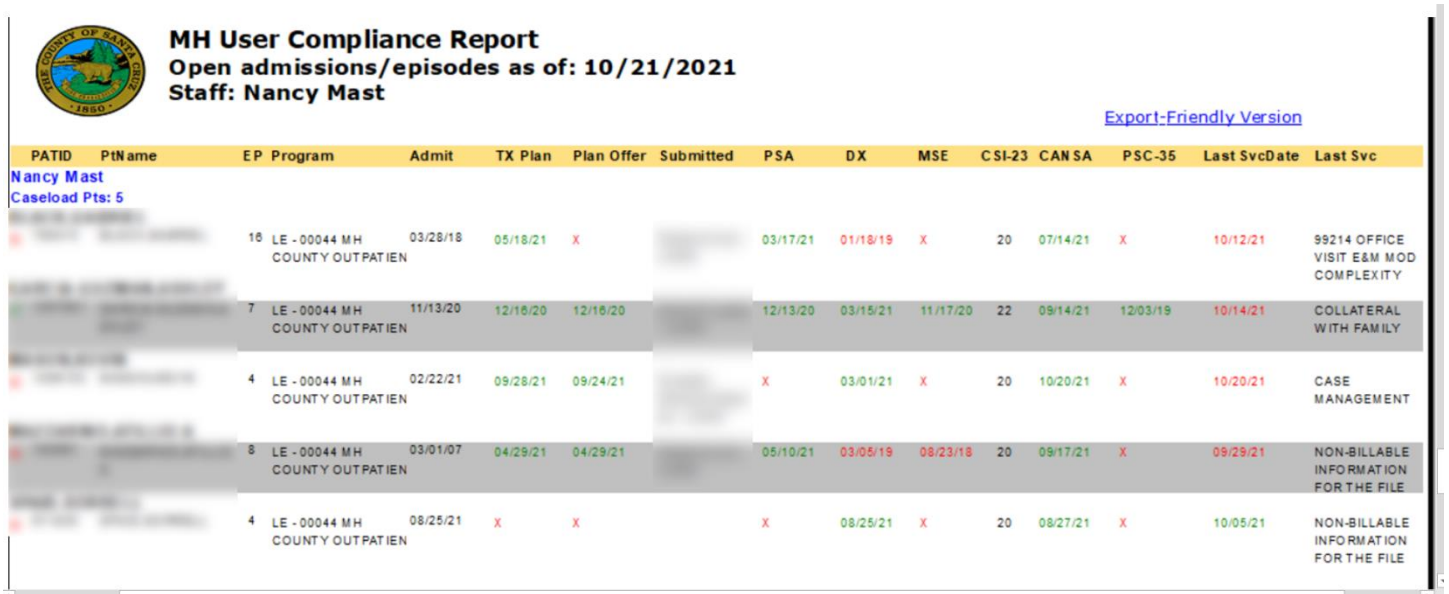
answering this question is a state requirement. Question and lightbulb will be updated to help clinicians understand how to answer the question. Additionally, question should not default from any prior assessment.

Dave: Data review of PSA Medical responses

TASK: Determine PSA Medical yes/no fields to be required; enable all text boxes but not required. Check on default form prior PSA.

## 2. NEW REPORT! Test MH User Compliance Report is now in LIVE.

- a. The report was developed for all providers to have a compliance report; supervisors have the program-level report. With the new report, line staff can print it any time they want to get an overview of when certain documentation needs to be completed. They



**MH User Compliance Report**  
Open admissions/episodes as of: 10/21/2021  
Staff: Nancy Mast

[Export-Friendly Version](#)

PATID	PtName	EP Program	Admit	TX Plan	Plan Offer	Submitted	PSA	DX	MSE	CSI-23	CAN SA	PSC-35	Last SvcDate	Last Svc
	Nancy Mast	16 LE - 00044 MH COUNTY OUTPATIEN	03/28/18	05/18/21	X		03/17/21	01/18/19	X	20	07/14/21	X	10/12/21	99214 OFFICE VISIT E&M MOD COMPLEXITY
		7 LE - 00044 MH COUNTY OUTPATIEN	11/13/20	12/16/20	12/16/20		12/13/20	03/15/21	11/17/20	22	09/14/21	12/03/19	10/14/21	COLLATERAL WITH FAMILY
		4 LE - 00044 MH COUNTY OUTPATIEN	02/22/21	09/28/21	09/24/21		X	03/01/21	X	20	10/20/21	X	10/20/21	CASE MANAGEMENT
		8 LE - 00044 MH COUNTY OUTPATIEN	03/01/07	04/29/21	04/29/21		05/10/21	03/05/19	08/23/18	20	09/17/21	X	09/29/21	NON-BILLABLE INFORMATION FOR THE FILE
		4 LE - 00044 MH COUNTY OUTPATIEN	08/25/21	X	X		X	08/25/21	X	20	08/27/21	X	10/05/21	NON-BILLABLE INFORMATION FOR THE FILE

no longer have to wait for their supervisor to print a report for them. Report provides info on when key documentation is due, e.g. tx plans, psychosocial.

Dave: Update from workgroup SUPERVISOR report

TASK: Recommend Report changes..

- a. Below are items from AMH line staff focus group re this report: **USER REPORT**
  - i. Name on printed report is "MH Supervisor Compliance Report" —
  - ii. Unanimous: EP column not needed
  - iii. Same for Program column—not needed
  - iv. Same for Staff Name—I am running my report for me, I don't need my name listed'
  - v. Admit date column—not needed.
  - vi. MSE—not needed
  - vii. CSI 23—not needed

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- viii. Last service description not needed.
- ix. Submitted column not needed
- x. For Adults don't need PSC-35

- 3. **Onset of Services** – Announced/Discussed decision from last meeting that at least SUDS SHOULD STOP USING THE ONSET OF SERVICES AND DOCUMENT THAT INTAKE FORMS HAVE BEEN DONE ELSEWHERE (PROGRESS NOTE).
- 4. Client Alerts Cleanup

Dave: Update from workgroup

TASK: Determine, Delete or Disable, Time Limited or not, Workflow for all Clerical Teams, Report Design

- 5.
- 6. Request for a system, likely an assessment, to track Key Indicators for Children's Intensive Support Services. STAFF: Stan Einhorn
  - a. NOABD Termination and Closing Inactive Episodes STAFF: Dave
- 7. **Question about what to do when Avatar times out and places itself "in front" of all items on your desktop so that you cannot access them. SOLUTION:** Press [windows key] + [D] to view your desktop again.



+ "D" minimizes all open windows and allows you to see your desktop.

- 8. **Scheduling calendar functionality does not allow reception to make multiple notations on a single appointment.** Chris McCauley reports that Netsmart suggested a change that we need to explore. What was proposed is a "partial solution" that was previously put in UAT but never put in LIVE. He will research. Flor will start group email with Chris, Nancy, Gian and a few others about this.

## Action Items

TIME: minutes

### 1. NEW ACTION ITEM

#### Parking Lot (did not have time to review parking lot)

- 1. DMC-ODS Pre-Admit Workgroup Report Out STAFF: Casey Swank TIME ALLOTTED: 10 mins
- 2. 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.

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3. Keep in parking lot since CalAIM will change this most likely. Evidence Based Practices (EBPs) question in progress notes. 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.

### **Next Meeting**

**Day/Date: Thursday, 1/13/22**

**Time: 9 AM – 10 AM**

### **Attendees**