Avatar Process Improvement Meeting Agenda

2/24/2022
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:	Click here for meeting agendas and minutes. Avatar Resources / Meetings

Get Involved!

- To add agenda items, complete the **AVATAR request form**; contact is David.chicoine@santacruzcounty.us

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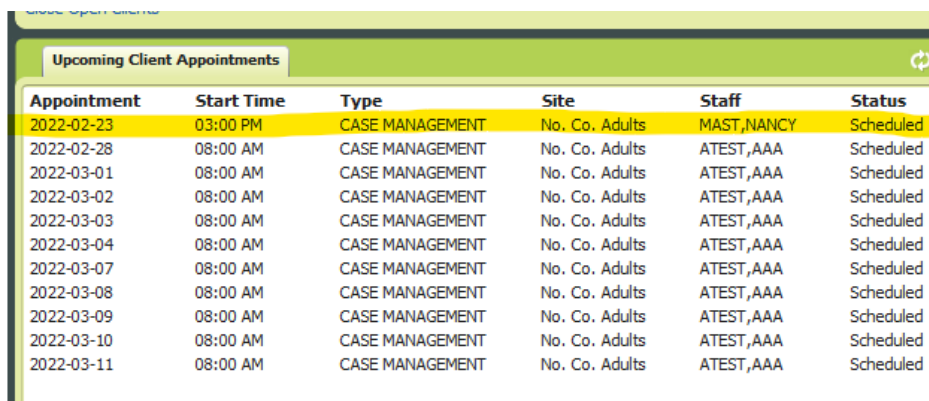
AGENDA ITEMS>>>

Introductions	TIME: 5 minutes	STAFF: Dave

1. **Next meeting – March 10, 2022**
2. **Introductions: name, program**

Announcements

1. **Agendas and meeting minutes are posted on the Avatar Webpage, Meetings Subpage.**
2. **A slight change was made to the "Upcoming Client Appointments" widget so that appointments are properly in sequential order, with the soonest appointment at the top of the list.** Previously, the widget was ordering appointments by the date that reception added the appointment to the calendar, which made it hard to see what appointments were coming up next. See the end of this agenda for more information.

Upcoming Client Appointments					
Appointment	**Start Time**	**Type**	**Site**	**Staff**	**Status**
2022-02-23	03:00 PM	CASE MANAGEMENT	No. Co. Adults	MAST,NANCY	Scheduled
2022-02-28	08:00 AM	CASE MANAGEMENT	No. Co. Adults	ATEST,AAA	Scheduled
2022-03-01	08:00 AM	CASE MANAGEMENT	No. Co. Adults	ATEST,AAA	Scheduled
2022-03-02	08:00 AM	CASE MANAGEMENT	No. Co. Adults	ATEST,AAA	Scheduled
2022-03-03	08:00 AM	CASE MANAGEMENT	No. Co. Adults	ATEST,AAA	Scheduled
2022-03-04	08:00 AM	CASE MANAGEMENT	No. Co. Adults	ATEST,AAA	Scheduled
2022-03-07	08:00 AM	CASE MANAGEMENT	No. Co. Adults	ATEST,AAA	Scheduled
2022-03-08	08:00 AM	CASE MANAGEMENT	No. Co. Adults	ATEST,AAA	Scheduled
2022-03-09	08:00 AM	CASE MANAGEMENT	No. Co. Adults	ATEST,AAA	Scheduled
2022-03-10	08:00 AM	CASE MANAGEMENT	No. Co. Adults	ATEST,AAA	Scheduled
2022-03-11	08:00 AM	CASE MANAGEMENT	No. Co. Adults	ATEST,AAA	Scheduled

Project Status and Updates

1. **Plan Type for SUD Treatment Plan**
    a. **Proposed change: remove two plan types that are no longer used, Quarterly and Annual.**
    b. Deactivated dictionary items cannot be selected when creating a new plan. For old plans in the chart, the item can still be seen but will have the "~INACTIVE" label next to it.

SC SUD Treatment Plan / Plan de Tratamiento de Uso de Sustancias

Authorization Start Date / Fecha de Autorizacion: 10/10/2021

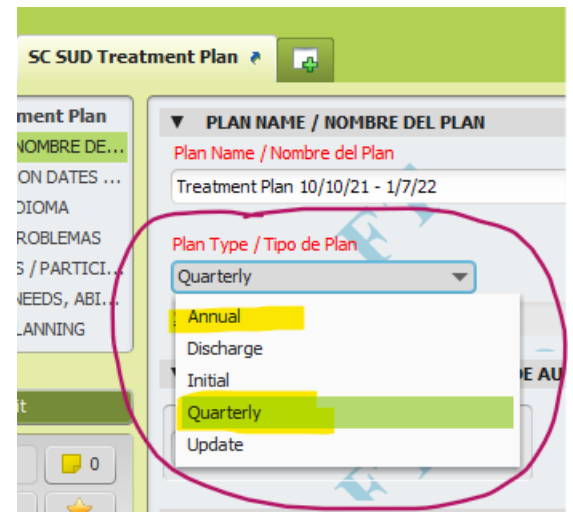Plan Name / Nombre del Plan: Treatment Plan 10/10/21 - 1/7/22

Plan Type / Tipo de Plan: Quarterly~INACTIVE

Authorization End Date / Fin de Autorizacion: 01/07/2022

Next Review Date / Siguiente Fecha de Revision: 12/24/2021

Last Updated / Ultima Actualizacion: 02/23/2022

Last Updated By / Actualizado Por: Nancy Mast

2. **New Telehealth and Phone Text Templates** for progress notes (due to changes in telehealth regulations).

   STAFF: Dave   TIME ALLOTTED: 15 mins


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** The above-named client gives consent for this Telephone visit and understands that
"telephone" is a non-visual telephone connection between the established client and the
Behavioral Health provider. The client understands the risks and benefits of a Telephone
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    a. These are in UAT for review.
    b. API to review Info Notice. If no edits needed, Notice will be sent to supervisors/managers for advance review, and then after the review period, sent out widely, along with these updates added to LIVE. (Nancy)

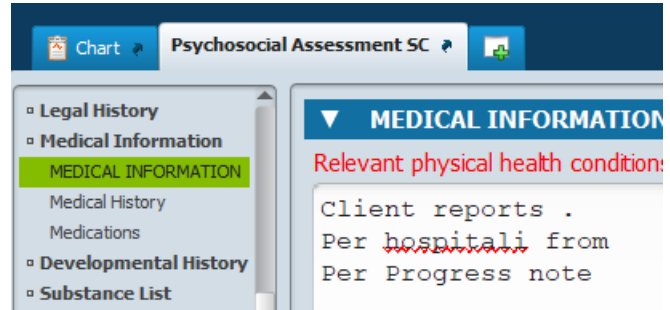3. **MEDICAL INFORMATION section on Psychosocial Assessment**
   STAFF: Dave   TIME ALLOTTED: 15 mins

Changes were made to several questions in the Medical Information section of the Psychosocial Assessment SC form to comply with state audit findings.

a. Changes: All questions in the section now be enabled, most red/required. Labeling and lightbulbs were edited on some questions to help guide staff.
b. No objections from committee re these changes.
c. Info notice review. Info Notice to be sent out shortly and then changes moved into LIVE by March 1.

4. **Children's Intensive Support Services (ISS) assessment and tracking**
   STAFF: Stan Einhorn   TIME ALLOTTED: 10 mins

   a. Stan Einhorn report out from subcommittee?
   b. **BACKGROUND: All CMH clients must be assessed at admission and every six months to see if they qualify for enhanced, intensive services, per new state regulations.** Current procedure involves paper forms and a spreadsheet. There are two paper forms, an assessment form, and a referral form. The referral form is filled out depending on the outcome of the Assessment. Assessment is done at intake and every six months thereafter. This is a complex procedure with multiple forms and multiple points of decision-making by several people and therefore is more appropriate for a subcommittee.

5. **DMC-ODS Pre-Admit Workgroup Report Out**   STAFF: Sarah Tisdale
   a. Has not met recently due to scheduling issues.

6. **Request to update the SC MH Short Treatment plan to have the headings in both English and Spanish like the other treatment plans.**   STAFF: Sarah Tisdale
   a. Committee approves update.
   b. Nancy to work on this.

7. **CANS/ANSA Spanish question labels in Spanish (like on MH Episodic Tx Plan)**

   a. To make the form more culturally available and to facilitate reading the form to the parent in Spanish.
   b. Lauren Fein is the manager of CANS/ANSA implementation. Regarding the paper versions of these forms, information from CMH/Lauren Fein is that the age 0-5 and 6-20 versions of the form, at least on paper, have been updated for Spanish. The 20+ version is still in process. These updates are being done by the Community Data Roundtable, which is the vendor for our CANSA web based services.
   c. Discussion about current practice – staff going over form with parents/children vs. filling out the assessment after meeting with client/family. If clinicians are not filling out the form with clients/family present, is there a need for Avatar to have questions in Spanish? The paper forms do have Spanish.

Action Items   **TIME: minutes**

1. SC MH Short Treatment plan to have the headings in both English and Spanish (Nancy Mast)

2. Children's Intensive Support Services (ISS) assessment and tracking to be organized. (Stan Einhorn)

Parking Lot

1. California Advancing and Innovating Medi-Cal (CalAIM) discussion.
2. Project list review and update for new year.
3. ROI Avatar forms. IT working to separate Spanish/English versions because combining was causing the report to take too long to run.
4. Possible updates to Evidence Based Practices (EBPs) question in progress notes. Keep in parking lot for now since CalAIM will change this most likely. 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.
5. DMC RTAR Form (Residential Pre-Authorization Form) – Conversion from Paper Form to Avatar Form STAFF: Amanda Crowder - This paper form is used for authorizing residential substance use treatment placements. There is a tight legal timeframe on these placements and having this info in Avatar would be helpful for tracking. We may need to hold off on this as this procedure may change with Cal-AIM.

Next Meeting

March 10, 2022   Time: 9 AM – 10 AM

Attendees

Appendix - Upcoming Client Appointments Widget Change

A slight change was made to the "Upcoming Client Appointments" widget so that appointments are properly in sequential order, with the soonest appointment at the top of the list.

Example: The appointment that was previously on the bottom row here…

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Upcoming Client Appointments