Avatar Process Improvement Meeting Agenda
4/7/2022
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 – May 5, 2022   April 21 meeting cancelled due to EQRO (state audits).**
2. **Introductions: name, program**

Announcements

1. **Agendas and meeting minutes are posted on the Avatar Webpage, Meetings Subpage.**

Project Status and Updates

1. **MEDICAL INFORMATION section on Psychosocial Assessment   STAFF: Dave TIME ALLOTTED: 5 mins**
   a. Pending in LIVE due to Avatar updates.

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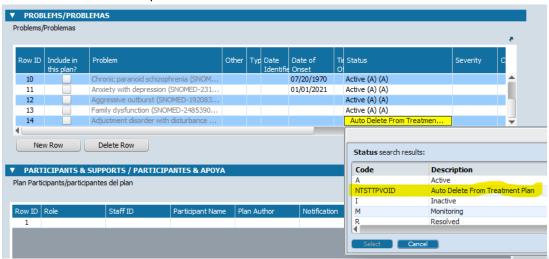
   STAFF: Stan Einhorn TIME ALLOTTED: 10 mins

   a. Meeting has not yet convened.
   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.
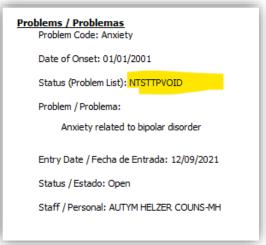
c. For TAY age clients in Adult MH Programs, both county and contractors need training in this system.

3. **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/Nancy 10 mins

   a. We are committed to facilitating Spanish in Avatar and want to remain culturally humble.
   b. The updates were previewed in UAT.
   c. Done and in UAT except for labels for Problems on the plan builder page (second page) which need to be fixed by Netsmart. Pending Netsmart Ticket.

4. **CANS/ANSA Spanish question labels in Spanish** STAFF: Dave 10 mins

   a. Gian/IT working on translation in UAT.

5. **NTSTTPVOID Status on Treatment Plans** STAFF: Nancy 10 mins

   a. We want to discuss parameters of use of this feature.

   b. Be careful to not void problems that others are using, in your episode and in others, because it creates the appearance of the problem not being valid. Someone accidentally voided a problem and now the plans that use is show as "NTSTTPVOID" for the status.

6. **Assessment Widget**   STAFF: 10 mins
   a. On the Assessment Widget, which provides information about when assessments and treatment plans are due, the logic for the Short Term Treatment Plan is not correct. This plan expires after three months. Logic currently is the same as the Episodic treatment plan which expires after year. Check in the Gian.

7. **New Filing Category for Scanned Correspondence in Chart**   STAFF: Nancy   10 mins
   a. See UAT, test client #11 for an example of how this looks.
   b. Other possible categories: NOABD's, ISS Screening tool

8. **Documenting Authorization History**   STAFF: 10 mins
   a. TBS Authorization, start date

9. **Tracking Adult Residential and Crisis Residential Timeliness**   STAFF: 10 mins
   a. For Telos, EDC and Casa Pacific
   b. Need to measure time between request for the bed, approval of transfer, and actual client date of client's admission.

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 workgroup 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.
6. DMC-ODS Pre-Admit Workgroup Report Out   STAFF: Sarah Tisdale The primary task of this workgroup is currently specifications for the Avatar version of the ASAM Screening tool.

Attendees

APPENDIX: List of Scanned Document Categories and Contents

Assessment (DR) **DO NOT USE DR CATEGORIES
Assessments
Progress Notes (DR) **DO NOT USE
Progress Note
Treatment Plan (DR)   **DO NOT USE
Treatment Plans
CLN-Assessments
Clinician Assessments
    Crisis Contact Form from Access
    Access Assessments
    Disability Assessment
    Social Security Assessment
    Jury Duty Assessment
    Children Assessments (many types)
    Children Team Meeting Notes
    IEPs
CLN-CSP Documents
    Outside Records from Telecare CSP only
CLN-Outgoing CPR (SUD)
    Client Progress Report
CLN-Outside Records
Hospital Records--Admission and Discharge Summary
    Medical Records--Summary Records
    Other Agency Assessments
CLN-Progress Notes
Clinician Progress Notes (other than those recorded in Avatar)
CLN-Treatment Plans
Clinician Treatment Plans--those with signatures
    Access Treatment Plans
    Multi-Directional Medi-Cal Transition Form
    Service Plans
FIN-Benefit Rep Documents
Client Insurance Information
    Copy of Driver's License

MHE25 Insurance Coverage
Social Security Authorizations
FIN-Client Registration
Client Registration
    Receipt of Privacy Notice
    Change of Address
    MHE Admission Form
FIN-Proof of Income
Income Documentation
    Service Adjustment Form
    Share of Cost Authorization
    UMDAP Forms
LGL-Consent for Treatment
Consent for Mental Health Services
    Consent for Exchange of Info
    Authorizations to Release Info
    Other Consent Documents
LGL--Conservatorship Documents
Conservatorship Documents
LGL-Informed Medication Consents
Informed Medication Consents
MED-Lab Results
Lab Results
Med-Physical Health Documents
Physical Health Documents
    Physical Assessments
MED-Prescriptions
Prescriptions
    Summary of Prescriptions
    Summary of Medications
    Letters on Medications
SCT-CAGE AID
CAGE AID documents
SCT-CANS ANSA
CANS ANSA documents