

Avatar Process Improvement Meeting Agenda

5/5/2022

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 19, 2022
2. Introductions: name, program

Announcements

1. Agendas and meeting minutes are posted on the Avatar Webpage, [Meetings Subpage](#).

Project Status and Updates

1. California Advancing and Innovating Medi-Cal (CalAIM) discussion STAFF: Dave Time: 10 mins
2. ADMISSION FORM STAFF: Dave TIME ALLOTTED: 15 mins
 - a. Having universal standard for how client names and addresses are done in the admission forms.
3. State will require notes in 3 business days starting July 1. How to measure? What about holidays?
4. COMPLETE: MEDICAL INFORMATION section on Psychosocial Assessment STAFF: Nancy TIME ALLOTTED: 5 mins
5. 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

Avatar Process Improvement Meeting Agenda

5/5/2022

9:00 AM - 10:00 AM

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.

6. **COMPLETE: 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

7. **COMPLETE FOR NOW? CANS/ANSA Spanish question labels in Spanish** STAFF: Dave 10 mins

- **Question labels** are translated and can be viewed in UAT.

- **Dictionary items:** Due to limited space (40 characters) it is not feasible at this time to have Spanish translation for dictionary items. This information could be added to lightbulbs. See examples of dictionaries below and at right.

What factors make treatment of the client/child challenging?

- Acceptance of diagnosis
- Access to Dental Care
- Access to Primary Care
- Communication problems
- Denial of Need for Treatment
- Family interference

Type of Assessment

Admission Update Discharge

Assessment for what population

- Adult Mental Health
- Alcohol/Drug Programs
- Children's Mental Health

- **Lightbulbs** are on hold. We are waiting for information from Community Data Roundtable which may have the information we need for lightbulbs.
 - a. Possibly we could use county contracted language support services, which would be done for a fee.
 - b. Some current lightbulbs are for a clinician working with a child and are not helpful for working with an adult client. This issue might need to get sorted before adding translation.
 - c. Community Data Roundtable is working on a Spanish language user's manual, which may have the language we are looking for. So let's not duplicate work until we see what that manual has to offer.

8. **Assessment Widget** STAFF: Dave 10 mins

- a. Next steps on this project?
- b. 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. Gian will look into this.
- c. The main issue from a programming perspective is that the tx plan item on the widget really is pulling from three different plans with three different expiration dates – 89 days, 90 days and 364 days.

Avatar Process Improvement Meeting Agenda

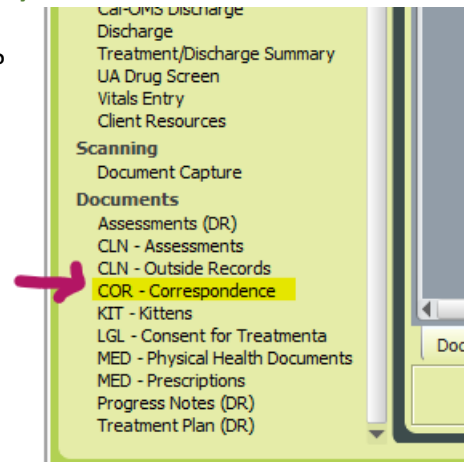
5/5/2022

9:00 AM - 10:00 AM

9. New Filing Category for Scanned Correspondence in Chart STAFF: Nancy

10 mins

- See UAT, test client #11 for an example of how this looks.
- We can add whatever categories we want, so what makes sense? The goal is to help people find things in the client chart, so too many categories would be a problem.
- Other possible categories: NOABD's, ISS Screening tool, financial documents, specific intake documents and Hospital summaries.
- Do we want to implement this addition in LIVE? Erica (accounting manager) has an updated list of document categories that reception has been updating periodically. Discussion of separate meeting to look into updating.



10. Documenting Authorization History STAFF: Stan

10 mins

- TBS Authorization, start date
- Adriana Bare working on this?

11. Tracking Adult Residential and Crisis Residential Timeliness STAFF: Dave

10 mins

- For Telos, EDC and Casa Pacific, there is a state requirement to measure time between request for the bed, approval of transfer, and actual client date of client's admission. I.e., when there is a request for a bed in one of these programs, how long does it take for the approval of the bed, and how long does it take to actually get the client into that facility.
- This is a request from EQRO.
- Data is not currently amassed in a consistent and reliable way. Different programs use their own tracking (spreadsheets) which is a problem when we need to analyze the data.
- Discussion of using Avatar to track this information.
- The wait list management system in Avatar could be explored as a solution.

12. Avatar "NX" (new version of Avatar coming) STAFF: Jorge

10 mins

- IT Staff going to a conference on this. IT dept has been having regular meetings with Netsmart re NX.
- Factors to consider:
 - We want to let problems shake out with early adopters first. Currently no CA counties are using NX.
 - To transition to NX, we need to make sure we have adequate staffing to provide support.

13. Problem with Viewing Tx Plans in Charts

STAFF: Nancy

10 mins

- We are still awaiting an update from Avatar to fix this problem.

ERROR DISPLAYING DATA

```
<SUBSCRIPT>FormatFieldValue+46^UICHARTHTML3 ^RCOC(1,53015,")
```

- There is a display error when trying to view some tx plans in the chart. Netsmart ticket has been filed and we expect a solution at the end of April.

Avatar Process Improvement Meeting Agenda

5/5/2022

9:00 AM - 10:00 AM

- c. You can still open plans from the HOME console. FINALIZED SUD Plans the the Short-term tx plan can be printed from the “Documents” section of the chart. Unfortunately, this will not work with the SC MH Episodic Tx Plan. Another solution is to use filtering buttons in the chart, which sometimes works.
- d. Note that the problem is uncommon.

Action Items

TIME: minutes

- 1. Children’s Intensive Support Services (ISS) assessment and tracking workgroup to be organized. (Stan Einhorn)

Parking Lot

- 1. Project list review and update for new year.
- 2. ROI Avatar forms. IT working to separate Spanish/English versions because combining was causing the report to take too long to run.
- 3. 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.
- 4. 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.
- 5. 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