		Avatar Process Improvement Meeting Notes		
		5/6/2021		
		9:00-10:00 AM		
		Microsoft TEAMS Meeting		
Meeting Identity and Mission:		Inclusive, collaborative, <u>agenda driven</u> Continued <i>Process Improvement</i> 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:  Meeting Website		Bring information back to the groups we represent, gather input and test current projects to our needs <u>Avatar Resources / Meetings</u>	ensure they meet	
Get Involved!		<ul> <li>To add agenda items, contact <u>Melissa.McCuiston@santacruzcounty.us</u></li> <li>Per County Virtual Meeting Protocols – Camera Use and mute your microply when you are speaking</li> </ul>	hone except	
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Agenda Items	Time	Comments	Staff	
1. Welcome to May!	5	<ul> <li>Housekeeping items – Please use the raise hand function or the chat box if you have questions, comments, concerns.</li> <li>Changes to minutes from last meeting</li> <li>Announcements</li> <li>Project Listing – Some projects have been submitted and the project form updated. It lives in the TEAMS folder</li> </ul>	Melissa All	
2. Project Status and updates	25	<ol> <li>DMC-ODS Pre-Admit Workgroup: The workgroup did not meet since the last process improvement meeting due to scheduling conflicts but will reconvene next week. It is anticipated that once workflows related to the new "pre-admit" episodes are done, implementation will be rapid.</li> <li>Consent Tracking, ROI Tracking Form &amp; Widget</li> <li>To clarify discussion: County staff know the form we are working on as "the Pink Form." This is the release of information that allows us to speak to others such as family (of an adult), benefits personnel, landlords, etc This form is not be confused with the Exchange of Information that allows SUDS programs to share info, or the Records Request form which is for requesting copies of a client's records.</li> <li>A preliminary version of the ROI Form is now in UAT for review. Search for "Legal Forms Tracking."</li> <li>Widget and form development workgroup - update         <ul> <li>Form is episodic.</li> <li>The workgroup discussed aspects of the reports (actual forms the</li> </ul> </li> </ol>	Casey Swank /All Robert/Gian Nancy Adriana	
	J	client signs) that will be generated.  c. Mockup for widget is being created.		

d. The workgroup thought it valuable to have a reminder for when

e. Discussion of a report that lists expired/expiring ROI's.

ROI's expire in My To Do's.

4) Next Steps:

- a. Workflows are still needed to help drive development of ROI forms, widget, report.
- b. IT and QI to continue work on this system in UAT for workgroup to look at.
- 3. Homeless Indicator Data Cleanup and Capture
  - 1) Action Item review from last meeting: Info Notice update and expected send date: Need to clarify whether or not info notice should be sent out as is, or do we need to add more information.
  - 2) Action Item review: Workflow development Is info notice enough?
    - a. The importance of CSI Data Collection There was general discussion about what to include in the info notice because overall, it is important for staff to understand why CSI information is gathered/needed and how it is important to our system, such as mandated state reporting and grant writing (CSI info is potentially tied to revenue).
      - i. There should be clear expectations for line staff about who gathers CSI info and adds it to Avatar, as well as who updates it and when. Line staff need to understand what their responsibilities are regarding CSI info. "Awareness is the first step." Staff need to understand why collecting this information and keeping it accurate is important.
      - ii. Data gathering should fall out of routine activities for line staff.
      - **iii.** We have a lot of things that happen annually. Could this be a good place to start.
  - 3) Related areas of data cleanup needed:
    - **a.** Supervisor to line staff relationship Many Avatar reports use this info to generate a report for a supervisor that has information related to all of the people they supervise. Each user's account has the name of the supervisor. If this is not accurate, related reports will not be accurate.
    - **b.** Caseload lists also need to be accurate.
  - **4)** Staff focused console Adriana will start a mockup of this with focused items.
- **4.** New Avatar Project Form is online:
  - 1) Use this form to submit a request/idea for a new form, report or other feature within Avatar.
  - 2) There is a link to this form on the Avatar Resource Page.
  - 3) Anyone can submit a project to the Process Improvement Meeting to review.
  - 4) All ideas are welcome!

## 3. Action Items

- DMC-ODS Pre-Admit Workgroup continues to meet to develop workflows and set timelines for implementation. Pre-Admit episodes need to be created in LIVE/UAT.
- 2) Consent Tracking, ROI Tracking Form & Widget
  - a. Meeting members to review the preliminary version in UAT.
  - b. IT and QI to continue work on this system in UAT for workgroup to look at.

Adriana/Case y/Key SUDS Staff All/Adriana/G ian/Melissa/ Nancy (All

meeting

members

	<ul> <li>c. Workflows are still needed to help drive development/implementation of ROI forms, widget, report.</li> <li>3) Homeless Indicator Data Cleanup and Capture <ul> <li>a. Meeting members need to clarify what the content of the Info Notice should be. Send out as is, or do we need to add more information?</li> <li>b. Need to ID steps/workflows for CSI data cleanup and ongoing monitoring.</li> </ul> </li> </ul>	please review in UAT!)		
4. Parking Lot	Updated Project Listing – Some updates for discussion	All		
Next Meeting:	May 20, 2021 9:00 am			
Attendees:	Nancy Mast, Adriana Bare, Sara Tisdale, Linda Cosio, Alex Threlfall, Kayla Gray, Robert Annon, Dave Chicoine, Halee Wiston, Briana Kahoana, Gian Wong, Casey Swank			