

Avatar Process Improvement Meeting Minutes

10/7/2021

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, contact David.chicoine@santacruzcounty.us

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

AGENDA ITEMS>>>

What's going on?

TIME: 5 minutes


STAFF: Nancy

1. Nancy Mast facilitating today for Dave Chicoine who is on vacation
2. Linda Cosio will take notes

Project Status and Updates

1. **DMC-ODS Pre-Admit Workgroup Report Out** STAFF: Casey Swank TIME ALLOTTED: 10 mins
 - a. During the Pre-Admit meeting the group determined that it would be best to go with a Pre-Admit Episode instead of working with the SRDL. The current Pre-Admit process flows quickly and efforts will be made to replicate this process flow in Avatar. A consent will be required. This will allow for entry of the Brief ASAM, referral data and case management tracking.
 - b. Casey will be moving forward to discuss with IT.
2. **NEW REPORT! Test MH User Compliance Report** is now in LIVE. STAFF: Nancy TIME ALLOTTED: 10 mins
 - a. The report was developed so that line staff have the ability to print their own compliance report without waiting for their supervisor to print for them. Staff will only have access to view clients from their caseload.
 - b. A new item was added. It notes whether the "Treatment Plan Offered..." Question on the treatment plan was filled in. Because the question is not "red" people forget often to fill it in. This is a Medi-Cal requirement and noted in our last state audit.

Date client was offered a copy of the Treatment Plan/Fecha en que se le ofrecio una copia del plan de tratamiento

10/04/2021 

Avatar Process Improvement Meeting Minutes

10/7/2021

9:00 AM - 10:00 AM

- c. Other Reports to consider for this: SUDS Supervisor Compliance Reports, Caseload Report, Progress Note Aging Report, Progress Note Aging Summary.
 - d. The Service Activity Report was also mentioned as a possible report. After discussion it was determined that this report should not include the cost column if run by line staff.
 - e. Sarah Tinsdale started the discussion regarding Group entries do not always reflect accurately on the Service Activity Report. After other shared concerns regarding this issue Nancy Mast suggested specific examples be sent to for further testing.
 - f. Questions regarding the correct documentation process for groups split between age groups, or groups comprised of mixed programs such as Outpatient and IOS need further review.
3. **Psychosocial Assessment** STAFF: Nancy/Robert TIME ALLOTTED: 10 mins
- a. The Medical Necessity Statement is required.
 - b. Non-licensed staff may not enter the MSE and/or diagnosis, and then have supervisor final/submit the document. There is no change to the current documented process.
4. **Treatment Plan Service Frequency** STAFF: Nancy TIME ALLOTTED: 5 mins
- a. This came up in the most recent state audit. Auditors questioned services being on a treatment plan, that were not being provided or provided very infrequently. For example, case coordinator adds rehab counseling to plan, but this service is not being provided.
 - b. Midyear review of plan may be useful as this needs to be monitored closely.
5. **Client Alerts Cleanup** STAFF: ? TIME ALLOTTED: 5 mins
It was decided to table this discussion to the next Avatar Process Improvement Meeting.
- a. Reception workflows? (Flor)
 - b. Other workflows?
 - c. Reports to help with cleanup?
6. **Updating Appointments Erases Data** STAFF: Flor TIME ALLOTTED: 5 mins
It was decided to table this discussion to the next Avatar Process Improvement Meeting.
- a. Problem with status of appts getting deleted if someone else does a second status update (Flor Perez, County Reception): We need a way to document multiple notes by different people about an appt. Also, if a client cancels, we have no way of having verification that the client cancelled because the appt just disappears.

Action Items

TIME: minutes

1. Reports - Determine which additional reports are to be made available for line staff use.
2. Avatar Group Reporting - Continued review of the correct documentation process for groups with varied age groups or programs.

Parking Lot

1. **TELECARE PHF ACCESS (Robert Annon):** Would be especially helpful for line staff to know if their client has been hospitalized. Gian to bring up in meeting with Netsmart and HIE to see about this being part of the external documents console.
2. **Progress Note Aging Report:** w/Client-level parameter (Michael Garcia)
3. **CSI Data Cleanup**
4. **Enrollment Process / AVATAR intake forms:** Do we use it or eliminate it?

Avatar Process Improvement Meeting Minutes

10/7/2021

9:00 AM - 10:00 AM

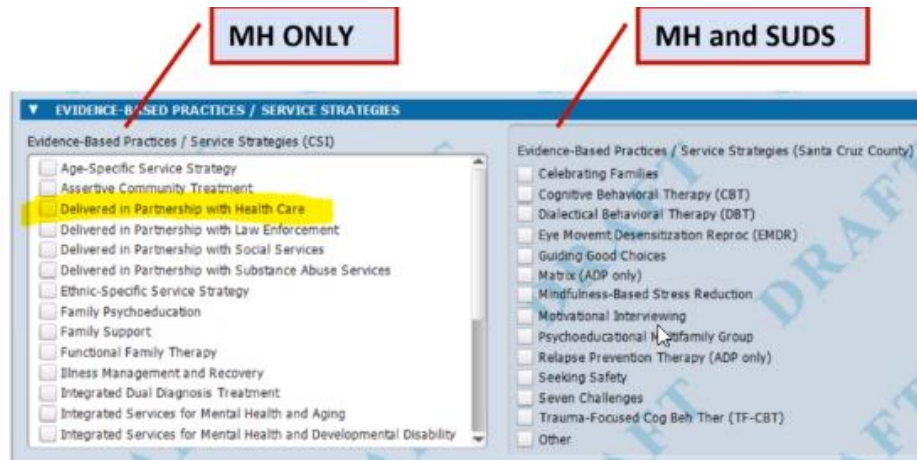
5. **Sticky Notes:** Issues with sticky notes both disappearing when you don't want them to, and hanging around when you don't want them to.

Suggested options for increasing the efficiency of sticky notes:

- Require an expiration date.
- Move older notes down on the list.

6. **Evidence Based Practices (EBPs)** STAFF: Claire

- 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.
- Table for now due to audits?



- Claire is willing to be a participant in reviewing the SUD EPBs as part of a committee.

Next Meeting

Day/Date: Thursday, 10/21/21

Time: 9 AM – 10 AM

Attendees

Nancy Mast, Linda Cosio, Casey Swank, Claire Friedman, Cybele Lolley, Cynthia Nollenberger, Dagny Blaskovich, Erica Ortiz, Gian Wong, Jorge Fernandez, Kayla Gra, Max Olkowski-Laetz, Maya Jarrow, Robert Annon, Sarah Tisdale, David Chicoine, Chris McCauley, Alexander Threlfall, Adriana Bare, Karen Kern, Andrew Jiang, Lisa Guitierrez Wang, Grace Saldivar-Napoles, Briana Kahoano