Avatar Process Improvement Meeting Minutes
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.**

Project Status and Updates

1. **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. No objections by committee.

2. **Episode Widget Update:** Stemming from our discussion above about sorting in the Appointment Widget, we talked about other widgets that might need this adjustment and identified the Episode Widget. The suggestion was to change the sorting in this widget slightly so that open episodes are at the top. This was unanimously agreed upon and the change was made by Gian the same day. See the updated widget in LIVE.

3. **Plan Type for SUD Treatment Plan**

   a. Proposed change agreed upon by committee: remove two plan types that are no longer used, Quarterly and Annual.
   b. Nancy to deactivate these items.

4. **New Telehealth and Phone Text Templates** for progress notes (due to changes in telehealth regulations).
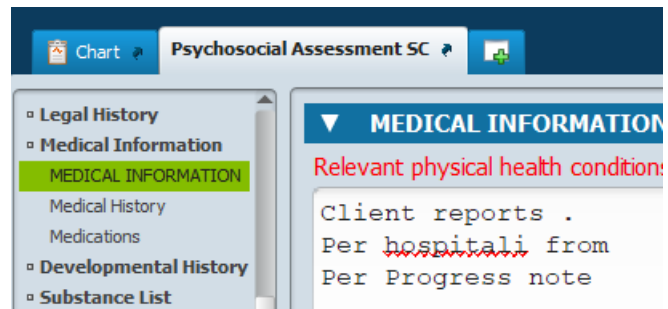
   STAFF: Dave   TIME ALLOTTED: 15 mins

   a. Committee agreed upon changes.
   b. Info notice will be sent to supervisors/managers for advance review, and then after the review period, sent out widely, along with updates added to LIVE. (Nancy)
   c. These are in UAT for review.

5. **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 will be sent to supervisors/managers for advance review, and then after the review period, sent out widely, along with updates added to LIVE by March 1. (Nancy)

6. **Children's Intensive Support Services (ISS) assessment and tracking**

   STAFF: Stan Einhorn   TIME ALLOTTED: 10 mins

   a. **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.
   b. Discussion today – For TAY age clients in Adult MH Programs, both county and contractors need training in this system.

7. **DMC-ODS Pre-Admit Workgroup Report Out   STAFF: Sarah Tisdale**

Has not met recently due to scheduling issues. The primary task of this workgroup is currently specifications for the Avatar version of the ASAM Screening tool. This item will be added to "Parking Lot" for now until this workgroup has info to report out.

8. **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. We are committed to facilitating Spanish in Avatar and want to remain culturally humble.

9. **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/guardian 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 what current practices are with this form. Are staff going over the form with parents/children and then entering data into Avatar later? Or are they filling out the assessment in Avatar with client/family present? 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.
    d. We need to have input from Spanish-speaking line staff who currently use this form to understand current practices. Sarah Tisdale will talk to Spanish speaking staff at Encompass.
    e. IT will need specific language for the Avatar form if we decide to update in Avatar.

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)
3. Update Episode widget to put all open episodes at the top (Gian Wong). (Already done!)
4. Send out info notices for a) Changes to Telehealth/Phone Text Templates, and b) Changes to Psychosocial Assessment Medical Info section. (Nancy)
5. Deactivate Annual and Quarterly Plan Types in the SUD Tx Plan (Nancy)

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

Briana Kahoano (County SUDS), Claire Friedman (Sobriety Works), Cynthia Nollenberger (County), Dagny Blaskovich (Volunteer Center), Dave Chicoine (County QI), Flor Perez (County Reception), Gian Wong (County IT), Jace Freyman (Encompass QI), Kayla Gray (County Psychiatry), Madea Owen (Encompass QI), Maya Jarrow (Janus QI), Nancy Mast (County QI), Paulina Uribe (Janus), Robert Annon (County Adult MH), Sarah Tisdale (Encompass QI), Stan Einhorn (County)