Avatar Process Improvement Meeting Minutes
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. Nancy to follow up.

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. Nancy to follow up.

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

    a. A version of the updated CANS is in UAT for review. Labels only.
    b. Dictionary items: Note that for updates like this, *dictionary* changes are more difficult than labels (questions), because we are limited to 40 characters for dictionary items. See examples of dictionaries below and at right.

c. Lightbulbs - Discussion of whether to translate lightbulbs, which provide direction to staff.
    i. Dave – Possibly we can use Praed or Community Date Roundtable resources, but it is not clear if this would align the version of the CANS that we have.
    ii. Discussion of whether to use county contracted language support services, which would be done for a fee.
    iii. 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.
    iv. Stan checked with Lauren after the meeting and informs that 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.

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.

    c. The issue has been flagged in audit previously.

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. Gian will look into this.

    b. 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.
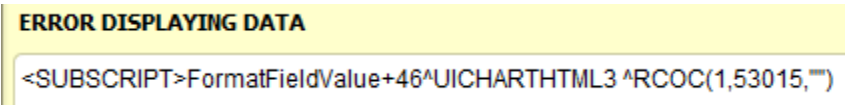
7. **New Filing Category for Scanned Correspondence in Chart**   STAFF: Nancy   10 mins

    a. See UAT, test client #11 for an example of how this looks.

    b. Other possible categories: NOABD's, ISS Screening tool

    c. Erica (accounting manager) has an updated list of document categories that reception has been updating periodically. Discussion of separate meeting to look into updating.

    d. Discussion about possible new categories such as financial documents, specific intake documents and Hospital summaries.

8. **Documenting Authorization History**   **STAFF: Stan**   **10 mins**
    a.   TBS Authorization, start date
    b.   Adriana Bare working on this?

9. **Tracking Adult Residential and Crisis Residential Timeliness**   **STAFF:**   **10 mins**
    a.   For Telos, EDC and Casa Pacific, there is a state requirement Need 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.
    b.   This is a request from EQRO.
    c.   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.
    d.   Discussion of using Avatar to track this information.
    e.   The wait list management system in Avatar could be explored as a solution.

10. **Avatar "NX" (new version of Avatar coming)**   **STAFF: Jorge**   **10 mins**
     a.   IT Staff going to a conference on this. IT dept has been having regular meetings with Netsmart re NX.
     b.   Factors to consider:
          i.   We want to let problems shake out with early adopters first. Currently no CA counties are using NX.
          ii. To transition to NX, we need to make sure we have adequate staffing to provide support.

11. **Problem with Viewing Tx Plans in Charts**   **STAFF: Stan**   **10 mins**
     a.   There is a display error when trying to view some tx plans in the chart.

     > **ERROR DISPLAYING DATA**
     >
     > <SUBSCRIPT>FormatFieldValue+46^UICHARTHTML3 ^RCOC(1,53015,"")

     Netsmart ticket has been filed and we expect a solution solution at the end of April.
     b.   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.
     c.   Note that the problem is uncommon.

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

Briana Kahoana (County SUD); Claire Friedman (Sobriety Works); Cybele Lolley (County QI); Cynthia Nollenberger (County Adult MH); Dave Chicoine (County QI); Erica Ortiz (County Accounting); Gian Wong (County IT); Jorge Fernandez (County IT); Kayla Gray (County Psychiatry); Maya Jarrow (Janus); Nancy Mast (County QI); Paulina Uribe ; Robert Annon (County Adult MH); Sarah Tisdale (Encompass QI); Stan Einhorn (County Childrens BH)