

Avatar Process Improvement Meeting Minutes

6/2/2022

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 – June 16, 2022
2. Introductions: name, program

Announcements

- Agendas and meeting minutes are posted on the Avatar Webpage, [Meetings Subpage](#).
- Dave on vacation this week. Nancy facilitating. Erica Ortiz taking notes.

Project Status and Updates

1. New Form Being Developed to Replace the SC Med Service Progress Note – This will add a diagnosis to the Med Note as well as other automation that doctors want. STAFF: Dr. Threlfall 10 mins
 - a. If the diagnosis is added, it's not clear that this connects to the diagnosis form, creating double work. Gian to look into a ScriptLink solution for this.
 - b. Form will also have an MSE that will replace our current MSE. Form will be simpler. Docs will fill out inside their medical note, but it will be in the chart as a separate document. Non-medical staff would fill it out separately, just like our current MSE.
 - c. Discussion:
 - i. Committee recommendations: Medical line staff, including nonphysician practitioners such as RNs who use the form should be involved, as well as representatives from DMC programs. Sara Tisdale will reach out to those individuals, including Anthony Jordan, DMC manager. Other

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medical directors should be involved in this project. Information about the medical note was discussed in the last medical directors meeting.

- ii. Question about whether MSE question or questions inside the new medical note will be required. There are some staff members that use this note that are not LPHA's such as RNs. The answer is: these fields will not be required and can be skipped by staff who do not use them.
- iii. Workflows will not change in terms of who completes medical progress notes. Nonmedical LPHA clinicians will still need to complete the separate MSE when they assess clients.

2. California Advancing and Innovating Medi-Cal (CalAIM) discussion Time: 10 mins

a. What is our input regarding adapting to these changes?

- i. Discussion about progress note timeliness changes - State will require most progress notes to be completed within three days of the service provided. Crisis notes need to be done in 24 hours.
 - 1. Due to the rapid rollout of CalAIM we do not believe the state is expecting 100% compliance on this beginning 7/1/22.
 - 2. We need to provide broad communication around these items so that staff understand the new requirement. We can address this by agency.
 - 3. We still need to work out how holidays and work schedules factor into these changes. Guidance from the state is not clear at this point. We will likely need to agree on our own standards around this, and then ensure that people are adhering to the standards. The standard will likely be universal. Too difficult to track different work schedules different holidays for different agencies, etc.
- ii. Discussion about SNOMED codes and Z Codes. Staff will need training re the use of these new codes. County needs to provide clear direction on use of these codes.
- iii. SUDS and Mental Health will collaborate to make joint decisions regarding some of these changes. Workgroups will be made with key stakeholders who are in both Mental Health and SUDS.
 - 1. Reports will change to reflect timeliness.
 - 2. Most staff are already completing their notes within the 3 day business day timeframe.
- iv. Treatment Plans - Treatment plans for many programs will go away, replaced by a problem list. Medical necessity and "plan" will be part of the narrative that the note. Medical necessity will not need to be in every single note. We are waiting for more specificity from the state about what progress notes must contain.
- v. Progress notes may change - we are waiting for more clarification and specifics about what needs to be in progress notes with CalAIM. QI is mindful of how this will impact line staff. Clarification – Note due on day 3. Day 1 is the date of service.
- vi. There may be some cultural shifts where staff need scheduled, dedicated time to get their notes done on a regular basis, rather than trying to do notes during "free time."

- b. BACKGROUND: The purpose of the CalAIM initiative is to streamline paperwork. Recoupment is to be based primarily on findings of "fraud, waste and abuse" rather than errors that are made in good faith such as an accidentally forgotten signature. In addition, we anticipate changes in medical necessity, the ability to bill for services prior to assessment, and treatment plan changes.
 - i. CalAIM proposes a new "no wrong door" focus which allows any client, with any diagnosis, to present at any service entity and receive services, which are now billable under CalAIM. This will create changes in workflows, assessment, case management and much more. The expectation is

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that if the client needs referral to another type of service, the case management and other activities designed to assess and then link the client to the proper services, are all billable. Note that clients will still have to meet criteria to receive services. The new regs allow us to bill for services we might provide while helping someone who does not qualify get to where they need to be.

- ii. Part of our adaptation to this is going to be customizing Avatar so we can still monitor things like timeliness, but these tools need to be updated so they can be aligned with all new thinking about clinical services. California DHCS has contracted with CAL MHSA to provide informative webinars to county QI staff weekly and we are currently going through the series.
- iii. There will be more guidance coming from the state including a manual created by CAL MHSA for line staff that describes the new documentation requirements.

DHCS Priority SDOH Codes

Code	Description
Z55.0	Illiteracy and low-level literacy
Z58.6	Inadequate drinking-water supply
Z59.00	Homelessness unspecified
Z59.01	Sheltered homelessness
Z59.02	Unsheltered homelessness
Z59.1	Inadequate housing (lack of heating/space, unsatisfactory surroundings)
Z59.3	Problems related to living in residential institution
Z59.41	Food insecurity
Z59.48	Other specified lack of adequate food
Z59.7	Insufficient social insurance and welfare support
Z59.811	Housing instability, housed, with risk of homelessness
Z59.812	Housing instability, housed, homelessness in past 12 months
Z59.819	Housing instability, housed unspecified
Z59.89	Other problems related to housing and economic circumstances
Z60.2	Problems related to living alone
Z60.4	Social exclusion and rejection (physical appearance, illness or behavior)
Z62.819	Personal history of unspecified abuse in childhood
Z63.0	Problems in relationship with spouse or partner
Z63.4	Disappearance & death of family member (assumed death, bereavement)
Z63.5	Disruption of family by separation and divorce (marital estrangement)
Z63.6	Dependent relative needing care at home
Z63.72	Alcoholism and drug addiction in family
Z65.1	Imprisonment and other incarceration
Z65.2	Problems related to release from prison
Z65.8	Other specified problems related to psychosocial circumstances (religious or spiritual problem)

Use of Z-Codes for clients being served prior to the establishment of a formal diagnosis: As part of the CalAIM “no wrong door” policy, we will be able to provide services and bill for things like case management, navigation, linkage and even psychotherapy prior to establishment of a formal diagnosis. DHCS describes these potential clients as, “persons with potential health hazards related to socioeconomic and psychosocial circumstances.” This ability to provide reimbursable services for clients prior to diagnosis is especially impactful for clinicians encountering clients who are

homeless, in crisis, on the streets, etc.... Counselors who are not LPHA’s would be able to use Z codes to facilitate billing. Below is a link to a DHCS document that further describes these codes.

Problem search results:

Code	Description
197963!!66199	Interpersonal problem (SNOMED-225706007)
327791!!66199	Interpersonal relationship problem without mental disorder (SNOMED-160822004)
327792!!66199	Interpersonal relationship problem, no mental disorder (SNOMED-160822004)
78912470!!66199	Witness to interpersonal violence (SNOMED-365448001)
81079!!66199	Interpersonal problem, not elsewhere classified (SNOMED-56098000)
Other	Specify Other

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<https://www.dhcs.ca.gov/formsandpubs/Documents/MMCDAPsandPolicyLetters/APL2021/APL21-009.pdf>

Row ID	Problem	Status	Date of Onset
1	Food insecurity (SNOMED-733423003)	Active (A)	05/18/2022
2	Homelessness (SNOMED-32911000)	Active (A)	05/18/2022

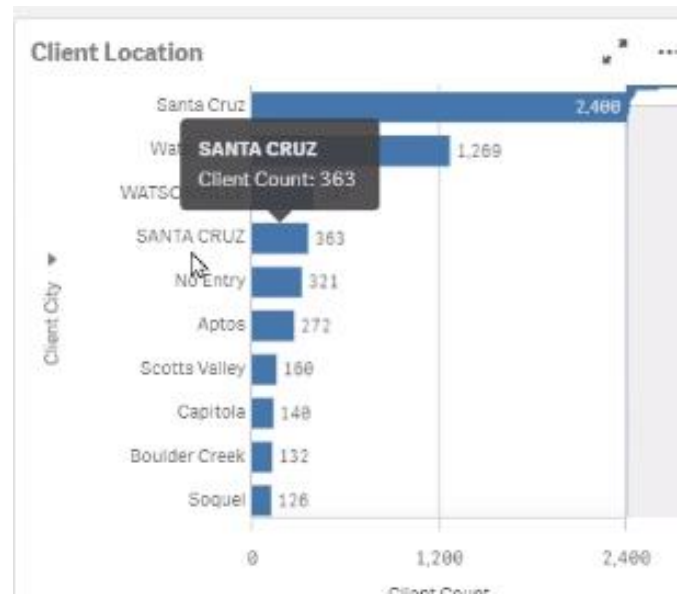
3. Complete! CONVENTION FOR ADDING DATA TO ADMISSION FORM

STAFF: Dave

a. Discussion

- i. Reports have been updated to not be case-sensitive.
- ii. IT recommends that people be trained to enter the ZIP Code first, before entering the city. The city will auto populate for some ZIP Codes, which prevents their being different formatting for the same city.

- b. BACKGROUND: We need a universal standard for how client names and addresses are entered into admission forms – all caps, vs. “proper” – SANTA CRUZ vs. Santa Cruz. This is a problem because one of our monitoring tools, KPI dashboards, is case sensitive, and sees SANTA CRUZ and Santa Cruz as separate cities. See graph at right. Proper Form is preferred – e.g. Santa Cruz. This information is important because the state requires us to monitor the location of clients in our county to ensure all clients are being served.



4. CANS/ANSA Spanish question labels in Spanish

STAFF: Dave

10 mins

- a. This project is almost complete. It just needs review to ensure labels are accurate.
- b. Question labels are translated and can be viewed in UAT. We will keep in UAT for two more weeks to allow people to test the form. In particular, can Spanish speaking staff look at the form to make sure that Spanish is correct.
- c. 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.
- d. Lightbulbs are on hold. We are waiting for information from Community Data Roundtable which may have the information we need for lightbulbs. Lauren Fein is project manager for CANS/ANSA and is taking the lead on that. Dave will bring up at the next meeting on the CANS/ANSA project.

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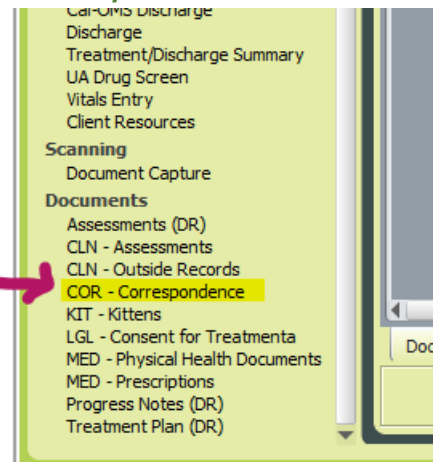
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5. Complete! Last Assessment Widget

- a. Gian updated logic so that it shows SUD plans expiring after 89 days.
- b. Background: On the Assessment Widget, which provides information about when assessments and treatment plans are due, the logic for the SUD Treatment Plan is not correct. This plan expires after three months. Logic currently is one year for all plans.

6. Proposed 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, financial documents, specific intake documents and Hospital summaries.
- c. Discussion
 - i. Separate meeting to work on this since it is very detailed?
 - ii. Goal of workgroup: To find out where paperwork should live. Streamline the process. Clerical needs clarification about what forms go where. There is a problem of some forms currently being filed based on who turned them in, which is not a functional system. Clerical doesn't usually know who turns in documents for scanning.
 - iii. Could this be discussed in a UR meeting?
 - iv. Some agencies have their own, different protocols around what gets discussed where.
 - v. Subgroup to be organized to work on this. Maya Jarrow (Janus), Flor Perez (County Clerical), Dave Chicoine, Nancy Mast, Claire Friedman, Others? MA staff? Children's programs?
 - vi. Other possible categories: Requests for letters of completion of service (Sarah Tisdale) – SUD programs provide these to clients frequently.
 - vii. Question: Is it appropriate to even have 5150 forms in a chart? QI team to discuss.
 - viii. Suggestion: paper routing slip that people attached to documents to be scanned that explains which category they go into



7. Tracking Adult Residential and Crisis Residential Timeliness STAFF: Dave 10 mins

- a. 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.
- 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. Could Avatar be used to track this?
- e. Discussion: Purpose is to get away from spreadsheets and put it all of this information under one roof so we can retrieve it from one single source and use it to measure and report timeliness (required by the state).

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Action Items

1.

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.
6. Documenting TBS Authorization History. Adiana Bare working on this?
7. Tracking Adult Residential and Crisis Residential Timeliness: Telos, EDC and Casa Pacific must 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 state auditors.
8. Children's Intensive Support Services (ISS) assessment and tracking (Stan Einhorn) Meeting to be organized.
9. PENDING Netsmart Solution: Request to update the SC MH Short Treatment plan to have the headings in both English and Spanish like the other treatment plans. All sections except Interventions have been moved to LIVE. There is a problem adding only the intervention section that has been reported to Netsmart.
10. Documenting TBS Authorization History (Stan Einhorn) - Adriana Bare working on this
11. Avatar "NX" (new version of Avatar coming) - Move to parking lot until NX development by Netsmart is more advanced. IT Staff going to a conference on this. IT dept has been having regular meetings with Netsmart re NX.

Attendees

Chris McCauley (County Psychiatry/Admin), Claire Friedman (Sobriety Works), Cybele Lolley (County QI), Dagny Blaskovich (Volunteer Center), Erica Ortiz (County Accounting), Flor Perez (County Clerical Supervisor), Gian Wong (County IT), Julie Krokidus-Wooden (Sobriety Works), Kayla Gray (Adult MH), Maya Jarrow (Janus QI), Nancy Mast (County QI), Robert Annon (Adult MH), Sarah Tisdale (Encompass QI), Silbiono Cruz (County IT), Stan Einhorn (Children's BH)