Avatar Process Improvement Meeting Minutes

7/14/22
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 – July 28, 2022**
2. **Introductions: name, program**
3. **Agendas and meeting minutes are posted on the Avatar Webpage, Meetings Subpage.**

Announcements (All CalAIM this week)

1. **The main Avatar Process Improvement Meeting (this meeting) will have two main areas of focus:**
   a. Report up from smaller workgroups
   b. Other selected CalAIM topics
   c. Parking lot items will remain in parking lot unless they are urgent.
   d. We will be talking about CalAIM in both meetings because it is urgent that we address these changes. Many started already on 7/1.
2. **CalAIM documentation changes for MHP and DMC-ODS took effect 7/1/22.**
3. **Two Information Notices regarding CalAIM, from the County QI Department came out 7/5/22.** It describes the CalAIM changes that took effect on January 1, 2022, as well as those that will start on July 1, 2022. These are posted on the County CalAIM Webpage:
   a. **MH CalAIM Info Notice**
   b. **DMC CalAIM Info Notice**

4. **QI CalAIM Office Hours:** In order to support line staff, supervisors and managers with implementation, the Santa Cruz County BH QI Department is hosting two different CalAIM office hours. These are Teams meetings.
    a. Meeting times:
        ▪ Fridays, 9 AM-10 AM, starting July 8
        ▪ Tuesdays, every other week, 3 PM-4 PM, starting July 12
    b. Topics: CalMHSA Training Topics (one per week), Other ideas?
5. **Avatar CalAIM Workgroup**
    a. First workgroup met on 7/7/22.
        ▪ This was a very large group. (Lots of interest!)
        ▪ Discussed implementation strategy
    b. MH psychosocial is first focus of the meeting. We will start working on specific requirements of assessment per CalAIM in the light of our current psychosocial.
        ▪ SUDS staff may attend but not required since you do not use this form.
        ▪ SUDS workgroup members were notified.
    c. Next form/change area to work on? We discussed the problem list as the next area of focus as well as discussing it today. Future topics:
        ▪ Updating progress note forms
        ▪ Daily progress notes for residential
            • QI is getting together our recommendations. Sara Avila will come next time to discuss.
            • There are Avatar programming questions to discuss for these notes but also content. (Sarah Tisdale)
        ▪ including billing codes
        ▪ Treatment Plans
        ▪ Diagnosis form
        ▪ QI monitoring tools (reports and widgets)
        ▪ Other selected CalAIM topics
        ▪ No wrong door billing, workflows, etc...
6. **DHCS sponsored CalAIM trainings** are available on the CalMHSA Learning Management System (LMS) for service providers and management. You need to sign up for their virtual training system (LMS) before you can take these trainings. **Register for the CalAIM trainings using the link below:**

    CalMHSA-LMS-Instructions-5.24.22.pdf

    County BH recommends that all providers take these trainings to learn more about the CalAIM changes.

    a. If you need help/troubleshooting with signing up for these, let Dave or Nancy know. (nancy.mast@santacruzcounty.us, dave.chicoine@santacruzcounty.us,)
    b. Agencies have done various things in terms of assigning to staff. Sobriety Works has assigned all their clinicians to do one per week.
    c. Also, if the trainings seem glitchy, try another browser.

7. The Netsmart CalAIM user group has been actively discussing CalAIM changes. Gian will send link to Dave/Nancy so they can start attending. Plan to have Dave/Nancy attend, and report out from, this user group.

8. **Problem List Discussion**
   a. Demo of updated problem list and the new Assessment Problem List form where you can enter the required "plan" for each problem.
   b. Discussion of adding capability for adding problems to a progress note, similar to how we add tx plan elements to a progress note.
      - Currently Avatar does not have this capability. We would need to request this from Netsmart. Dave/Nancy to attend Netsmart CalAIM meeting and report back.
      - However, is adding problems necessary since we are establishing medical necessity for each service (per CalAIM)?
   c. Discussion of new column on Problem list, "Action," that has *Treating/Not Treating* as the two options. Claire: Possibly this is to indicate the presence of a problem that is not being treated. For example, an SUD program might want to address methamphetamine use, but not cannabis use. They would label cannabis use as "not treating."
   d. Julie Krokidas-Wooden: It sounds like the Tx Plan is going away and being replaced with Problem List. Does that include the implementation of SMART Goals? Discussion: At this time, there's no guidance on this changing so for now, continue using smart goals in treatment plans.
   e. Discussion of need for staff training for the Problem List and Diagnosis form. With CalAIM, many staff who have not previously used the Diagnosis form will now do so.staff entering these in Avatar. Options:
      - This should be a function of ongoing clinical supervision. In addition, clinicians with degrees should have training in what diagnosis or problems to pick.
      - The CalAIM training regarding the problem list has some helpful information.
      - People who write treatment plans should already be familiar with the problem list.

9. **Clinical Trainings (Plan – Stan)**
   a. Clinician asking for training regarding the DSM vs ICD-10 coding and requesting improved search capacity on ICD -10.
   b. We do not have control of this list.

Project Status and Updates

1. **CalAIM Workgroup 1: Psychosocial (Mental Health Programs Only)**

Action Items

1. Dave/Nancy sign up for Netsmart CalAIM usergroup, attend and report out next time.

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Parking Lot

1. Proposed New Filing Category for Scanned Correspondence in Chart
2. 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.
3. Project list review and update for new fiscal year 2022-2023.
4. ROI Avatar forms. IT working to separate Spanish/English versions because combining was causing the report to take too long to run.
   a. Splitting output.
   b. Button to select Spanish
5. 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.
6. 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.
7. 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.
8. Documenting TBS Authorization History. Adriana Bare working on this?
9. 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.
10. Children's Intensive Support Services (ISS) assessment and tracking (Stan Einhorn) Meeting to be organized.
11. 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.
12. 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.
13. CANS/ANSA Spanish question labels in Spanish - Question labels are translated and can be viewed in UAT. 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.
14. Tracking Adult Residential and Crisis Residential Timeliness   (Dave)

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Attendees

Claire Friedman (Sobriety Works), Cybele Lolley (County QI), Cynthia Nollenberger (County Liaison Program), Dagny Blaskovich (Volunteer Center), Dave Chicoine (County QI), Erica Ortiz (County Accounting), Gian Wong (County IT), Grace Saldivar (County AMH), Julie Krokidas-Wooden (Sobriety Works), Kayla Gray (Healing the Streets), Maya Jarrow (Janus QI), Paulina Uribe (Janus – QI Analyst/Admissions), Sarah Tisdale (Encompass QI), Silbiano Cruz (County IT), Stan Einhorn (County CMH)