Avatar Process Improvement Meeting Notes

7/1/2021 9:00-10:00 AM Microsoft TEAMS Meeting

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 *Melissa.McCuiston@santacruzcounty.us* • **Housekeeping items** – Please use the raise hand function or the chat box if you have questions, comments, concerns.

Agenda Items	Time	Comments	Staff
1. What's going on?	15	• **Announcements / Updates:** a. Clarification re: location code and Add appointment form discussion from last meeting. Discussion of possible Info Notice. b. Adriana - Discuss possible idea for eligibility widget	Melissa/Gian Adriana
2. Project Status and updates	15 15 10	• **DMC-ODS Pre-Admit Workgroup:** a. Workgroup Status Update b. Questions & Answers • **Consent Tracking, ROI Tracking Form & Widget (In UAT as *Release of Information*)** • **Update:** ROI workgroup met and spent some time walking through workflows. There will be a second form for rescinding. Gian will work on the form and add a few items that we came up with. • Next Steps: Nancy and Melissa to meet to start draft of workflow. • Gian (IT) reports widget is complete. QI to review to make sure it has all the items we need. • **Data Cleanup Initiative** a. CSI Data Collection – IN for Homeless data item has been sent. No questions about procedures from recipients. There WERE questions about how to interpret data items – i.e. what to enter. Unfortunately there is little information about how to define these items from the state, that requires this reporting. b. Discussion of staff console that includes a widget to monitor ongoing compliance information. Adriana is doing this. c. Creation of a generic avatar account to submit caseload changes to for cleanup initiative. QI says no to this. d. Caseload and Supervisory clean-up – Discussed development of workflows so that staff understand who enters this data,	Casey Swank /All Robert/Nancy Nancy Adriana Adriana Adriana

		when it is reviewed and updated, who does the updating, and who monitors for compliance e. Next Steps: Workgroup to meet to start work on project next week. f. Supervisors can obtain a list of current open cases for their team and supervisees using Caseload Report and Simple Caseload Report. (The simple one is just a list of names. The other one has a lot more info.) • Discussion of form bundling in Avatar – Key points a. To see examples of bundles in Avatar, type "bundle" in forms search. b. If you need a bundle created, come up with a list of forms and think about whether they should be "sequential" (forms open one at a time – when one form is completed, the next one opens) or "concurrent" (all forms open up at once). Look at the Avatar manual also which has a bit that explains about bundles. c. Unfortunately, a bundle can only have either CWS forms or PM forms. They can't be mixed.	
3. Action Items	5	1) Review new widgets and forms in UAT.	All
4. Parking Lot		Project Listing – Are there any quick ticket items that could be addressed while the other projects are being worked on. Updated Project request list. Posted on the Avatar Website.	All
Next Meeting:	**July 15, 2021 9:00 am**		
Attendees:	Adriana Bare, Chris McCauley, Cybele Lolley, Dagny Blaskovich, Dave Chicoine, Gian Wong, Judy Miramontes, Kayla Gray, Linda Cosio, Lisa Gutierrez-Wang, Maya Jarrow, Melissa McCuiston, Nancy Mast		