Avatar Process Improvement Meeting Notes

4/8/2021
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* - Per County Virtual Meeting Protocols - keep your camera on at all times and mute your microphone except when you are speaking

Agenda Items	Time	Comments	Staff
1. Welcome Spring!!!	5	- Housekeeping items – Please use the raise hand function or the chat box if you have questions, comments, concerns. - Changes to minutes from last meeting - Announcements	Melissa All

2. Project Status and updates	10
	
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		1. DMC-ODS Pre-Admit Workgroup:
		   a. Status and Updates (Casey Swank/All)
		   b. Workgroup has met. Adriana to attend future meetings to advise re financial/billing piece of creating these new episodes.
		2. Consent Tracking, ROI Tracking Form & Widget (Gian/All)
		   a. Definition: By Release of Information (ROI), we mean a form that gives permission to speak to someone involved in a client's care or on behalf of the client, such as: parent of an adult client, a caregiver who is not the legal guardian, client's landlord, client's spouse, client's primary care physician. County staff are familiar with the term, "pink form."
		   b. Action item review from last meeting: Creation of ROI Form in UAT – In progress. The form is complex and will also require "reports" (printouts) in both Spanish and English (also in process).
		   c. Workflows
		      i. Workflow development needs to happen at the TEAM level, be clearly documented, and staff trained for consistency. How can we get started on this?
		      ii. Workflows needed for monitoring when consent is revoked by the client or the release expires.
		      iii. Robert Annon working on this for Adult MH.
			Casey Swank / All
			
			Gian
			
			All
			
			Adriana/All

| | | d. Is ROI tracking useful for SUDS providers? The thinking this is that it is not useful to them, because they don't have the need to rapidly ID consents (and revocations) like AMH and potentially CMH. SUDS programs have their own processes that are working for them.
e. Adult MH has been engaged. We need to recruit someone from Children's for discussion of this form.
f. Need to consider extensive work done with Linda Garret on design of form so that it is in keeping with CFR 42. QI needs to be part of this discussion.
g. Discussion (not discussed in meeting today): Widget design – what do we want to see and how do we capture it?
h. What are different programs currently using as a ROI?
    i. Clarification – This is not the Countywide Exchange of E H R form, which is different.
    ii. What was direction from county re this form?
    iii. Some contractors use their own forms, or a combination of this form and their own form.
    iv. Melissa will add a document Teams for people to fill out, which describes what they use for their ROI.
i. Discussion of changing the name of the form to "Permission to Share" which is more descriptive of the use of the form and prevents confusion with the County Exchange of Information and Records Request forms, which are also, in their own way, releases of information. This will be discussed by the QI dept.

3. Homeless Indicator Data Cleanup and Capture (Adriana/All)
a. Widget design – what do we want to see and how do we capture it?
b. Which question about living situation/homelessness do we want to use? There are three, plus there is a "living arrangements" question on the Cal-OMS. We are thinking of using the "Client Living Arrangement" question which is on the Admission form.
c. Workflows and an Info Notice will be done to ensure clinicians are filling this question out and updating when needed. The workflow should have users, at least on an annual basis, checking key pieces of CSI info and updating as needed. There should probably be a "minimum list" of items clinicians should look at for accuracy, as part of the workflow. Nancy will work on the Info Notice.
d. There is a report in Avatar for CSI info, connected to a user's caseload, and set up for supervisors to use, but it is not used widely. Info Notice to include info about this report. Discussion of adding "agency wide" option to report for managers to use to track an agency's compliance. | |
| 3. Action Items | 5 | | All |

4. Parking Lot			
Next Meeting:	**April 22, 2021 9:00 am**		
Attendees:	Melissa McCuiston, Nancy Mast, Kayla Gray, Gian Wong, Adriana Bare, Dagny Blaskovich, Linda Cosio, Maya Jarrow, Judy Miramontes, John Wasielewski, Sarah Tisdale, Alexander Threlfall		