

# Avatar Process Improvement Meeting Agenda

6/17/2021

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](mailto: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. Announcements	10	<ul style="list-style-type: none"> <li>• Announcements –                             <ol style="list-style-type: none"> <li>a. Light Agenda this week due to vacation season! Lots of overlapping vacations have delayed workgroup meetings and forward progress.</li> <li>b. Adding Facilities to Avatar- Several waiting to be added. Status Request from Adriana. Is there anyone else that could help with this task? <b>Adriana is working on this</b></li> </ol> </li> </ul>	Melissa All
2. Project Status and updates	10  10  15	<ul style="list-style-type: none"> <li>❖ <b>DMC-ODS Pre-Admit Workgroup:</b> <ul style="list-style-type: none"> <li>➤ Group will add reps from Sobriety Works – Claire Friedman and John.</li> </ul> </li> <li>❖ <b>“Legal Forms Tracking” - Consent Tracking, ROI Tracking Form &amp; Widget (In UAT as Release of Information)</b> <ul style="list-style-type: none"> <li>➤ <b>Recap: Saw the draft Widget with filtering options. Form is now episodic. Please look at it now if you have not done so already. It is called “Legal Forms Tracking” and is in UAT. <a href="https://santacruzuat.netsmartcloud.com//radplus/index.jsp">https://santacruzuat.netsmartcloud.com//radplus/index.jsp</a></b></li> <li>➤ We continue to work on how rescinding a release of info will work in Avatar.</li> <li>➤ Discussion:                                     <ul style="list-style-type: none"> <li>▪ Key is making sure that those who need to are aware of when a release is about to expire, or has been revoked. This involves Avatar systems, but also workflows managed by supervisors.</li> <li>▪ We are investigating whether or not we can have a To Do Item for these releases. It would have to be based on caseloads, because the clinician who initially got the client signature on the release of information is often not the person currently working with the client. We don't want to be notifying the wrong person.</li> </ul> </li> <li>➤ <b>Next Steps:</b> Janus staff to join group for SUDS representation.</li> </ul> </li> <li>❖ <b>Data Cleanup Initiative</b></li> </ul>	Casey Swank /All  Robert/Nancy/Melissa/All  Nancy  Adriana  Adriana  Adriana

		<ul style="list-style-type: none"> <li>➤ <b>Recap: More than just the homeless indicator. The Importance of CSI Data Collection Information Notice to include information about WHY data is important (Potentially tied to revenue) for staff. Status on ETA for IN to be sent.</b></li> <li>➤ Discussion <ul style="list-style-type: none"> <li>▪ Goal is to have data cleanup ongoing and part of people's normal work, so CSI data is accurate.</li> <li>▪ What are natural points at which data might be updated: Admission? Annually? End of fiscal? Other times?</li> <li>▪ From a clinical perspective, keeping chart information accurate is part of good care. Knowing where your client is, how they are doing, how to contact them, is all extremely important. Addresses and phone numbers are part of CSI.</li> <li>▪ How to build in accountability/monitoring for CSI updating?</li> </ul> </li> <li>➤ A separate workgroup will meet to continue these discussions. Adriana Bare, Robert Annon, Claire Friedman, Linda Cosio, Nancy Mast. Focus of the group: <ul style="list-style-type: none"> <li>▪ identify which items are key fields to keep updated across MH - SUD</li> <li>▪ identify natural cycle when to update them and ensure they are accurate (annual /episodic)</li> <li>▪ recommend an accountability flow to ensure items are accurate</li> <li>▪ collate documentation how to make the changes</li> <li>▪ Workflows from other agencies are saved in the TEAMS folder for review</li> </ul> </li> <li>❖ Problem: Progress notes automatically enter the location as "office." When clinicians change this, it will often revert back. Changes are being made to progress notes that will hopefully fix this problem. It involves changing the order in which certain questions appear on progress notes. This issue was brought up through the online <a href="http://www.santacruzhealth.org/HSAHome/HSADivisions/BehavioralHealth/AvatarProjectRequestForm.aspx">Avatar Project Request Form</a>.</li> </ul>	
	10		Melissa/All
3. Action Items	5		All
4. Parking Lot		<ul style="list-style-type: none"> <li>• Updated Project request list. Posted on the <a href="#">Avatar Website</a>.</li> </ul>	All
Next Meeting:	July 1, 2021 9:00 am		
Attendees:	Melissa McCuiston, Kayla Gray, Dave Chicoine, Cybele Lolley, Gian Wong, Cynthia Nollenberger, Adriana Bare, Maya Jarrow, Claire Friedman, Linda Cosio, Lisa Gutierrez Wang, Casey Swank, Briana Kahoana		

