

**Avatar Process Improvement Meeting  
Agenda**

**Meeting Date  
Friday, 9/8/2017**

**9:00-10:00 AM, 1400 Emeline, 2<sup>nd</sup> Floor, Conference Room 207**

Agenda Items	By Whom	Notes	Minutes
<b>1. Projects in Process</b>	<ul style="list-style-type: none"> <li>a) Admission, Update Client Data, Discharge changes</li> <li>b) SUD Treatment Plan</li> <li>c) CANS ANSA report (to IT group)</li> <li>d) State reporting CSI &amp; CalOMs</li> <li>e) User/Practitioner/License clean up</li> </ul>		<ul style="list-style-type: none"> <li>a) To LIVE week of 9/5/17</li> <li>b) Testing vetted, ready to use in live 9/1/17 – Documentation coming</li> <li>c) To IT group, assigned to staff.</li> </ul>
<b>1. Bundles what they are how they work</b>	Cole Kortlever	Review Admission and Discharge bundles to create for SUD and MH workflows. Useful for new staff	
<b>2. New Report Design: Pending Routed Documents</b>	From 5/5/17 meeting (If time allows)	All-inclusive report listing all items pending approval by Staff, Supervisor and form. Need: Client # name, routed date, days pending, program, clinician, routed person, practitioner categories for both.	Progress Notes, Treatment Plans, Psychosocial, ASAM Assessment Summary, Risk Assessment, all routed document
<b>3. Appointment Scheduler</b>	Adriana Bare	Highlighting Scheduling Calendar abilities, answer questions on setting up calendars for staff.	
<b>4. Next Meeting</b>	Next meeting: 9/15/17 Room <b>207</b> , 1400 Emeline 2 <sup>nd</sup> Floor.		
<b>5. Additional Items waiting to be scheduled</b>	<ul style="list-style-type: none"> <li>• ALOC form creation (Waiting for Riverside form)</li> <li>• SUD use of appointment scheduler for service timeliness</li> </ul>		
<b>6. Attendees</b>			