Avatar Process Improvement Meeting
Agenda

Meeting Date
Friday, 4/27/2018
9:00-10:00 AM, 1400 Emeline, 2nd Floor, Conference Room 207

Agenda Items	Staff Area	Notes	
REMINDER: **How to get to UAT to test the work we do in this meeting**		- Ask for help from your help desk, who will guide you to create a shortcut pointing to: https://santacruzuat.netsmartcloud.com	When testing widgets, remember to "Reload Home View", so the new widgets are visible.
1) Residential Service note template	SUD staff	Review sample template in UAT, decide if it's ready to move to LIVE. Consider if same template for SUD and MH residential. Consider if other fields besides intervention should be open. Consider if we need change to "Progress Note Purpose" options.	
2) Brief ASAM form	SUD/ Access	Should we create a Brief ASAM form in Avatar? What workflow will we implement to use it? Discuss current form shared by Lynn, and Design how it would look in Avatar.	
3) DHCS Audit follow up	MH staff	• Workflow and/or form changes to address state's view regarding treatment plan being valid for 12 months after the LPHA signature date. A plan can be valid shorter than 365 days, but never longer. ○ Option 1: ○ Retain "From" date tied to Episode opening anniversary, used as target date, so we can have a predictable cycle. Possibly eliminate "To" date. Research if possible to highlight LPHA signature and Submit signature dates in chart view. ○ Option 2: ○ If we abandon From date, how will we notify staff when plan is due, and ensure it is clear to all. Workflow order is as follows and can't be changed: 1. Clinician assesses client and starts developing plan with client and supervisor input 2. Clinician and Client complete plan. 3. Client Signs 4. Clinician submits FINAL plan and routes (if not LPHA) 5. Supervisor/LPHA approves a. We must remember that the plan is valid for "up to" 365 days after date of item 5)	
4) Last Assessment Widget	All Staff	New widget we are testing in LIVE because we need real scenario data to see if it's correct. Asked to add: "ASAM Re", and change the logic to show Need update based on MH vs SUD episodes. (might need to also add time frame – we will discuss)	
Future and Pending Agenda Items	➢ Episode Closings: Analyze and recommend workflows for closing episodes, including what tools are needed for support ➢ Diagnosis in Episode widget does not change when updated, should it show most current or admission dx? ➢ Network Adequacy follow up to additional items needed ➢ Caseload Report changes - Diagnoses (dates and clinician), ASAM information ➢ Pending notes report ➢ Discuss adding Age to Home view (new widget?) ➢ Clear start end time for documentation		
5) Next Meeting	Next meeting: (**Back to our usual LOCATION)** **5/11/18** in Room **207**, 1400 Emeline 2nd Floor.		
6) Attendees			