

# Avatar Process Improvement Meeting Agenda

**Meeting Date**

**Friday, 6/22/2018**

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

Agenda Items	Staff Area	Notes
<b>REMINDER:</b> 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: <a href="https://santacruzuat.netsmartcloud.com">https://santacruzuat.netsmartcloud.com</a>  When testing widgets, remember to “Reload Home View”, so the new widgets are visible.
<b>1) Residential Service note template</b>	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.
<b>2) DHCS Audit follow up</b>	MH staff	<ul style="list-style-type: none"> <li>• Review current UAT testing for workflows that require LPHA user to submit plan</li> <li>• Review current UAT report listing treatment plans that need attention               <ul style="list-style-type: none"> <li>○ Supporting tools needed:                   <ol style="list-style-type: none"> <li>1. To-Do reminders: Next review date s/b 350 days from Final date. Participants need to include LPHA so they also receive reminder.</li> <li>2. Widget: Add Tx Plan due date related to LPHA signature with color formatting to Last Assessment Date widget or create new one</li> <li>3. Report: Add Tx Plan LPHA signature date and due date to Current Caseload report, or create new report</li> <li>4. Research and discuss UR workflow we can turn on to validate Progress Notes with Tx Plans.</li> </ol> </li> </ul> </li> </ul>
<b>3) Last Assessment Widget</b>	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 Tx Plan dates Review widget and see if it’s now complete.
<b>4) CANS / ANSA</b>		CANS reviewed by County staff – items to disable identified. Review with group and determine if it’s ready to proceed. Request status report for same activity for ANSA.
<b>Future and Pending Agenda Items</b>		<ul style="list-style-type: none"> <li>➤ Brief ASAM form in Avatar</li> <li>➤ Episode Closings: Analyze and recommend workflows for closing episodes, including what tools are needed for support</li> <li>➤ Diagnosis in Episode widget does not change when updated, should it show most current or admission dx?</li> <li>➤ Network Adequacy follow up to additional items needed</li> <li>➤ Caseload Report changes - Diagnoses (dates and clinician), ASAM information</li> <li>➤ Pending notes report</li> <li>➤ Discuss adding Age to Home view (new widget?)</li> <li>➤ Clear start end time for documentation</li> <li>➤ Discuss ROI in onset of services form, (ability to click on the boxes)</li> </ul>
<b>5) Next Meeting</b>		Next meeting: <b>6/29/18 in Room 207, 1400 Emeline 2<sup>nd</sup> Floor.</b>
<b>6) Attendees</b>		