

Avatar Process Improvement Meeting Agenda

Meeting Date
Friday, 9/7/2018

9:00-10:00 AM, 1400 Emeline, 2nd Floor, Conference Room 207

Meeting identity and mission
Inclusive, collaborative, focused, agenda driven, Continued Improvement Process to meet new state and federal requirements, improve client care and staff experience. This group gives us the opportunity to: Share our voice and needs to impact policy, create and modify forms, reports and queries. Also requires our commitment to: bring information back to our respective groups, gather opinion and test current projects to ensure they meet our needs, as well as share the finalized recommendations back with the staff we represent.

| Agenda Items | Staff Area | Notes | |
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| 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.netmartcloud.com | When testing widgets, remember to “Reload Home View”, so the new widgets are visible. |
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| 1) Treatment Plan | All Staff | Report back after testing form with additional LPHA date, removing the automatic update at submit, to fix the workflow problem created for SUD Tx plan | |
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| 2) CSI compliance update | MH Staff | Share the compliance report to see progress. | |
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| 3) Episode Widget | All Staff | Confirm this widget update is working properly and is ready to move to LIVE. | |
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| Episode Number | Adult Program | Adult Practitioner | Attending Practitioner | Adult Date | Discharge Date | Discharge Type | Primary Diagnosis |
|----------------|-----------------------------------|--------------------|------------------------|------------|----------------|----------------|---------------------------------|
| 196 | Tobacco - Santa Cruz Adult Crisis | NAHOLY, TRESTAN L | | 09/16/2018 | 09/17/2018 | A | Episode - disorder, unspecified |
| 195 | Tobacco - Santa Cruz Adult Crisis | BOLEWICZ, DHESHA | | 01/28/2017 | 01/31/2017 | A | Schizophrenia, unspecified |
| 194 | LE - OCEAN MH VOLUNTEER CENTR | LAUBER, KEVIN | | 09/07/2018 | | U | Schizophrenia, unspecified |
| 193 | Encorepoint - Adult Respite | BERNARD, ADRIAN H | | 01/31/2018 | 02/09/2018 | | Hearing Diagnosis |

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| Future and Pending Agenda Items | <ul style="list-style-type: none"> ➤ CANS 6-20 to edit, CANS 0-5 9/14/18, ANSA 9/28/18 ➤ Client Info Widget: Should we add a widget to quickly see key information for a client like: Name, Age, Address, Phone number? ➤ Brief ASAM form in Avatar – Access to services workflow ➤ Episode Closings: Analyze and recommend workflows for closing episodes, including what tools are needed for support ➤ Network Adequacy follow up to additional items needed ➤ Caseload Report changes - Diagnoses (dates and clinician), ASAM information ➤ Pending notes report ➤ Discuss ROI in onset of services form, (ability to click on the boxes) | | |
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| 1) Next Meeting | Next meeting: 9/14/18 in Room 207 , 1400 Emeline 2 nd Floor. | | |
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| 2) Attendees | | | |
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Web Conference Call information: <https://ocean-aacca.co.santa-cruz.ca.us/797781> Meeting ID code is: **797781** Phone number for audio: **(831)454-2222**