Avatar Process Improvement Meeting Agenda
Meeting Date **Friday, 10/26/2018** **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 both 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	
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) Episodic ALOC forms	SUD Staff	Reporting recommendation changes to the Episodic Adult LOC forms. Progress report with Episodic Adolescent ALOC form	
2) Current Caseload Report	All Staff	Review change requests for the Current Caseload report, and other feedback from staff regarding this report. - Adding diagnosis date - Adding ALOC dates - Discuss removing some historical data	
3) Compliance Report for clients in caseload	All Staff	Staff share different tools Supervisors keep on their own format, often in spreadsheets, to help clinicians stay on top of due dates for annual updates and other requirements. We'll discuss these tools in hopes to develop a report that tracks all important items, without having to create separate spreadsheets.	
Future and Pending Agenda Items	➢ Report to evaluate compliance for age of notes and presence of Tx plans ➢ Episodic ALOC form: Subcommittee review of final changes return 11/2/18 ➢ Next CSI Compliance Update 11/2/18 ➢ CANS 6-20, CANS 0-5, ANSA to edit ➢ Supervisory report for progress notes aging and Treatment Plan coverage ➢ Brief ASAM form in Avatar – Access to services workflow (Renamed as Referral form) ➢ 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 – 10/26/18 ➢ Pending notes report ➢ Discuss ROI in onset of services form, (ability to click on the boxes) ➢ Discussion on qualifying for enhanced services eligibility (ICC/IHBS) ➢ New form for Medical History and Physical		
1) Next Meeting	Next meeting: **11/2/18** in Room **207**, 1400 Emeline 2nd Floor.		
2) Attendees			