

Avatar Process Improvement Meeting Agenda

Meeting Date
Friday, 6/7/2019

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

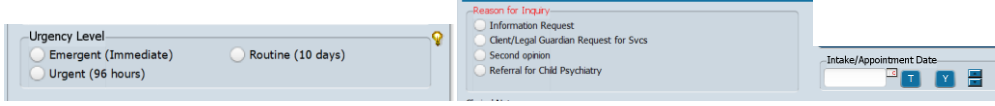
Meeting Identity and Mission: Inclusive, collaborative, agenda driven Continued Process Improvement meeting focused on new state and federal requirements, as well as improving client care and staff experience.

Opportunity to: Share both our voice and needs to impact policy, create and modify forms, reports and widgets

Commitment to: Bring information back to the groups we represent, gather opinion and test current projects to ensure they meet our needs

Agenda Items	Staff Area	Notes
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Skype Meeting Link for 6/7/19: <https://meet.lync.com/santacruzcountyca-co/barea/9688WWYN>

<p>1. Service Request and Disposition Log Form</p>	<p>All Staff</p>	<ul style="list-style-type: none"> • SRDL must be used to capture client’s attempts to seek services, accompanying clinical dispositions and appointments offered • SRDL is also used in other instances: <ul style="list-style-type: none"> ○ To track incoming referrals from partners ○ To track interactions with clients not yet connected to the system during the engagement period • There’s a desire to streamline the form and eliminate some fields, perhaps change the order of fields and the logic that drives them <p><u>Current suggestions under discussion:</u></p> <ul style="list-style-type: none"> • Is Client currently using any substances? Proposing to eliminate or transform into yes/no, only available when Referring Party Role = Self • Clinical disposition clarification of scenarios, perhaps change option titles • Gates, clarify list or programs who are gates and must use SRDL • Move Urgency Level to highlight its importance • Rename Intake/Appointment Date to “Intake/Appointment Date offered:” Make required when “Referred for Services” disposition is selected • Add a new date field to capture appointment date client accepted, if different • Reason for Inquiry, key field, needs to match to different workflows we are using the form and will drive timeliness reporting. Consider following language <ul style="list-style-type: none"> ○ Client/Legal Guardian Request for Svc (no change) ○ Request for Psychiatry Svcs (Although this might fit better as a disposition) ○ Referral from other ○ Engagement/Crisis Encounter ○ Information request ○ Follow up SRDL • Consider changing the “potential client section” by adding an “Anonymous Client” option, when that is clicked force ANONYMOUS under the Client Last name and disable all other fields, so staff will not need to enter SSN/DOB/Address/Phone number <div style="margin-top: 10px;">  </div>
<p>2. CANS ANSA</p>	<p>Child MH Staff</p>	<ul style="list-style-type: none"> • Edited form moves to LIVE on 6/7/19
<p>3. PSC-35 State</p>	<p>Child MH Staff</p>	<ul style="list-style-type: none"> • Status of form availability in UAT • County will enter forms saved since 7/1/18. Deliver these to Adriana Bare at 1400 Emeline Bldg K

required form	<ul style="list-style-type: none"> • Once form is available County will develop training documentation and share with contractors • Assessment engine, once installed will also include the following forms as part of a bundle <ul style="list-style-type: none"> ○ PHQ-9 ○ Fagerstrom ○ PHQ-2 ○ Audit C ○ Brief Addiction Monitor (BAM)
Next Meeting:	Friday 6/14/19 in Room 207, 1400 Emeline 2 nd Floor
Attendees:	<u>In person:</u> <u>Remotely:</u>