

## Avatar Process Improvement Meeting Agenda

### Meeting Date

Friday, 6/28/2019

**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 6/21/19: **No Skype Available.**

<p><b>Service Request and Disposition Log Form</b></p>	<p>All Staff</p>	<ul style="list-style-type: none"> <li>• SRDL must be used to capture client’s attempts to seek services, accompanying clinical dispositions and appointments offered</li> <li>• SRDL is also used in other instances:                             <ul style="list-style-type: none"> <li>○ To track incoming referrals from partners</li> <li>○ To track interactions with clients not yet connected to the system during the engagement period</li> </ul> </li> <li>• There’s a desire to streamline the form and eliminate some fields, perhaps change the order of fields and the logic that drives them</li> </ul> <p><u>Current suggestions under discussion:</u> Please <b>see the attached documents for more detailed info. Below are highlights.</b></p> <ul style="list-style-type: none"> <li>• There has been general discussion about the need for a universal script that people taking calls can use, and some guidelines organized by scenarios to help people who use the SRDL.</li> <li>• Date and time of request need to reflect the time of call, even when answering service takes the call.</li> <li>• <b>Request Method and Request Source Question:</b> These questions have quite a bit of overlap and in fact some of the items on each of these probably should belong to the other question. I.e. some of the responses for the “Method” question should really be a “Source” and vice versa. <b>We recommend for next time, focusing on cleaning up the dictionary items for these two questions.</b></li> <li>• The following questions in the SRDL are key and need to be considered carefully by the committee, because they drive the data needs to be collected from this form:                             <ul style="list-style-type: none"> <li>○ Date/time of request</li> <li>○ Reason for Inquiry</li> <li>○ Urgency level</li> <li>○ Referring Party Role</li> <li>○ Clinical Disposition</li> <li>○ “Referred To” questions</li> <li>○ Intake/Appointment Date</li> <li>○ Draft/Final</li> </ul> </li> </ul>
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<b>Next Meeting:</b>	<p>Friday <b>6/28/19</b> in Room 207, 1400 Emeline 2<sup>nd</sup> Floor</p> <p><b>NOTE: We will NOT be meeting 7/5/19.</b></p> <p><b>Next meeting: 7/12/19</b></p>
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<b>Attendees:</b>	<p><u>In person:</u> Claire Friedman, David Chicoine, Lynn Harrison, Nancy Mast, Sarah Tisdale, Lisa Gueierrez-Wang, Emily Sellers, Joanna Moody</p> <p><u>Remotely:</u> No Skype Available.</p>
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