Avatar Process Improvement Meeting Agenda	
Meeting Date **Friday, 5/5/2017** **9:00-10:00 AM, 1400 Emeline, Conference Room 207**	

Agenda Items	By Whom	Notes	Minutes
1. Treatment Plan Report	Amber Williams	Report is not showing dates for psychiatrist signature. Recommend report to be modified to show approved dates	Additional suggestions to modify report: • Change the red language when there is no routing to "Not routed" black not italic. • Add dated approved in the routing section • Add client signature date when it was captured
2. Treatment Plan	Charley Wilkins	Why does "Authorization start date" get grayed out immediately after entering?	Reiterated workflow to ensure the start date is confirmed to match the episode opening date before going on to the plan builder, since date cannot be edited afterwards.
3. Supervisor Report	Charley Wilkins	Requesting for 2 reports: 1). TP's left in draft form 2). Pending notes that have been sent to supervisor but not yet approved	1) Use the Current Caseload report to supervise for compliance since it shows plan status. We'd like to add ASI and ASAM assessments to the list as well as the CalOMS counter of completed items like the one for CSI. 2) Need a new report that shows notes which are still pending approval after (Final, Routed, Not yet approved) Need: Client # name, service date, program, clinician, routed person 3) Use ERS daily statistic report to review all patients and drill down billable services and on active clients to make sure clinicians are completing discharge
4. Test Clients Naming Convention	Sharon Polak	Naming convention for test clients.	Using TTT as the first 3 letters on the last name for test clients. Besides the test clients below,

		• Identify and reduce test clients • Recommend and publish naming convention	email Adriana to make sure all test names are updated.
5. Missing DFF Report	Wendy Ettinghoff	Determine what is wrong with Missing DFF report to recommend change	This report is mis-named, it's only intended for ADP Funder Reconciliation. It shows what has happened in an episode. Need to create a separate report that shows open episodes without DFF on file.
6. Scanning documents	Cole Kortlever	Naming conventions and available documentation	Shared current naming conventions. Client Number, form name and date of signature/creation
7. Next Meeting	**(No Meeting on 5/12/17)** 5/19/17 (1400 Emeline, Room 207)	Agenda items carrying forward to 5/19/17:	
		Agenda items to be scheduled after resolution	Group Codes Indirect time (A710)
8.		New items:	Update Client Data Scanned documents retrieval
Attendees:			

Item 4: Test Client List

Test Client List					
PATID	c_date_of_birth	c_age	patient_name	patient_name_first	patient_name_last
1	1/1/1960	57	BLOCKED,TIME	TIME	BLOCKED
2			RESERVED,TIME	TIME	RESERVED
10	1/1/1970	47	PLAN,TEST	TEST	PLAN
100	1/1/1901	116	TEST,PLAN	PLAN	TEST
103017	7/3/1949	67	TEST,TEST	TEST	TEST
103328	1/1/1966	51	TEST,TWO T	TWO	TEST
110636	1/1/1957	60	TESTY,VERY	VERY	TESTY
112510	1/1/2000	17	TESTTEST,TEST	TEST	TESTTEST
960001	6/30/1980	36	TESTTWO,MARY	MARY	TESTTWO
991040	1/1/2014	3	TTTEST,TESTB	TESTB	TEST
999105	1/1/2005	12	ALIAS-TEST,CHILD	CHILD	ALIAS-TEST
999512	12/12/1999	17	TTTEST,DOE	DOE	TTTEST

Test Client List					
PATID	c_date_of_birth	c_age	patient_name	patient_name_first	patient_name_last
1000788	1/1/1950	67	TESTAAA,TEST L	TEST	TESTAAA
1000789	1/1/1960	57	TESTBBB,TEST	TEST	TESTBBB
1000790	1/1/1970	47	TESTCCC,TEST	TEST	TESTCCC
1000791	1/1/1980	37	TESTDDD,TEST	TEST	TESTDDD
1234567	1/1/2010	7	PRACTICE,FQ	FQ	PRACTICE