

## Avatar Process Improvement Meeting

### Agenda

**Meeting Date**

**Friday, 6/23/2017**

**9:00-10:00 AM, 1400 Emeline, 2<sup>nd</sup> Floor, Conference Room 207**

Agenda Items	By Whom	Notes	Minutes
<b>1. UAT testing</b>	Adriana Bare	Reports from UAT testing, share any known issues, prepare for LIVE upgrade on Monday.	None reported
<b>2. Admission Form Review</b>	Adriana Bare	Because of new upgrades and new field added, we are taking opportunity to review the whole form and eliminate information we don't have to report to payers or state entities, or have otherwise some other clinical use.	<p><b><u>Eliminate</u></b> (make invisible) the following fields, from top to bottom:                      Practitioner Type, Disposition, Presenting Problems-Primary, Presenting Problems-Secondary, Presenting Problems-Tertiary, Current Medications – 1, Current Medications – 2, Current Medications – 3, Admission Department Time Out, Previous Hospital Admission Date, Previous Hospital Discharge Date, Religion, Place of Birth, Country of Origin, Maiden Name, Marital Status, Occupation, Mother's Maiden Name, the entire "Inpatient/Partial/Day Treatment" tab, Unit, Room, Bed, Licensed/Unlicensed, Room And Board Billing Code, Admission Charge Code, Daily Charge Code, Partial Hospitalization Days, Partial Hospitalization Effective Date</p> <p><b><u>Change Label:</u></b></p> <ul style="list-style-type: none"> <li>• "Sex" becomes "Gender"</li> <li>• "Admission Note" becomes "Optional Comments", this field is not meant to replace and admission progress note and only used to leave notes about the admission.</li> </ul> <p><b><u>Move:</u></b> The new sexual orientation field from the bottom up to the top left, below "Sex"/"Gender". Nancy will research this</p>

			<p>new field to confirm it was correctly implemented by Netsmart, single select options mix identity and sexual orientation.</p> <p>Re-arrange remaining fields to ensure form is easy to read and eliminated fields don't leave empty space.</p>
<p><b>3. Update Client Data Form Review</b></p>	<p>Adriana Bare</p>	<p>Much of the same decisions from above will carry forward to this form</p>	<p><b><u>Eliminate</u></b> (make invisible) the following fields, from top to bottom:  Maiden Name, Marital Status, Religion, Place Of Birth, Country Of Origin, Occupation, Mother's Maiden Name</p> <p><b><u>Change Label:</u></b></p> <ul style="list-style-type: none"> <li>• "Client's Home Phone" becomes "Client's Preferred Phone"</li> </ul> <p><b><u>Move:</u></b></p> <ul style="list-style-type: none"> <li>• Social Security Number to the right and Epic Client ID to the left of Social Security Number, to match Admission</li> <li>• Client's Work Phone down to the Electronic Contact Information section</li> <li>• Switch Client Race with Ethnic Origin</li> <li>• Move Education next to Employment Status</li> <li>• Move Other Race next to Race</li> <li>• Move Client Declined to Provide Information On The Following to the top right, below Language, Race and Ethnic origin</li> <li>• Move Smoking Status Assessment Date up to the Smoker tab next to Smoker</li> </ul>
<p>Additional Notes/Follow Up:</p>	<ul style="list-style-type: none"> <li>• We might consider using the lead provider field to denote the main clinical contact for each client in that episode, so staff including receptionists can tell who is involved with a particular case. If not this consider creating a widget that displays SYSTEM Code compliant information to all providers who have a client in their caseload.</li> <li>• Review definition of Smoker with Karolin in the context of MU (Meaningful Use), is this only for Nicotine?</li> <li>• Process review: <ul style="list-style-type: none"> <li>• Make recommended changes in the form in UAT, look at it next meeting</li> <li>• Have staff test in UAT</li> <li>• Modify appropriate workflows and documentation</li> </ul> </li> </ul>		

	<ul style="list-style-type: none"> <li>• Notify staff : both directly from this group to their agencies and line staff as well as through a large distribution email</li> <li>• Make sure the list includes staff below: Charley, Wendy, Claire, (lynn give new life contact), Sarah, Amber</li> <li>• Move changes to LIVE</li> </ul>		
<b>4. ADP Tx Plan testing</b>	Workgroup	Report any issues with the changes to the Tx Plan	Changes from 6/16/17 have not been complete, staff will test once they are available.
<b>5. Next Meeting</b>	6/30/17 Room 207, 1400 Emeline.	Agenda items carrying forward to 6/30/17:	Review form changes in UAT
		Agenda items to be scheduled after resolution:	
		New items:	Caseload Report questions, Design Routing Report scheduled for 7/30/17 Schedule ALOC form design for 7/14/17 Schedule Discharge review for a meeting August Schedule current Transgender Client Procedure to the first meeting whose agenda allows 10 min
<b>Attendees:</b>	Wendy Ettinghoff, Jessica Nichols, Claire Friedman, Lynn Harrison, Cybele Lolley, Amber Williams, Shaina Zura, Nancy Mast, Sarah Tisdale, Inbal Yassur, Briana Kahoano, Charley Wilkins, Joanna Moody, Adriana Bare		