	Avatar Process Improvement Meeting			
	Agenda			

Meeting Date
Friday, 7/14/2017
9:00-10:00 AM, 1400 Emeline, 2nd Floor, Conference Room 207

Agenda Items	By Whom	Notes	Minutes
1. **Admission, Discharge and Update Client Data**	Adriana Bare	Final review after gathering Staff input and before moving changes to LIVE environment	No further changes, next steps, modify documentation, announce change to staff, move change to LIVE
2. **Review Workflow for Transgender clients name**	Adriana Bare	Review posted workflow how and when to use this procedure	Reviewed workflow posted in the website under Avatar Resources, Therapeutic Identity Change Script. http://www.santacruzhealth.org/Portals/7/Pdfs/Avatar/Therapeutic%20Identity%20Change%20Script%20%28final%29%2011-3-16.pdf
3. **CANS ANSA Reports**	From 6/30/17 meeting	Review the reports available, discuss workflow and recommendations for aggregate report	Required every 6 months, across all entities, not episode bound. Brainstormed which assessments to include and how to select the clients, recommended: User selects programs of service, service date range, CANS/ANSA date range, report selects *Ordered Pairs* of assessments for clients in the service range. (Descriptive picture below.)
4. **New Report Design: Pending Routed Documents**	From 5/5/17 meeting	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	Not covered in meeting, scheduled for after CANS/ANSA report design is complete.

5. **Next Meeting**	7/21/17 Room **207**, 1400 Emeline.	Agenda items carrying forward to 7/21/17:	Pending Routed Documents – Report design
		New items:	
Attendees:		Wendy Ettinghoff, Esther Orellana, Karolin Schwartz, Briana Kahoano, Cybele Lolley, Jeffrey Burt, Jorge Fernandez, Michelle Sapena, Sergio Lopez, Shaina Zura, Rose George, Nancy Mast, Adriana Bare	

Notes from the board as we brainstormed which Assessments to Report.
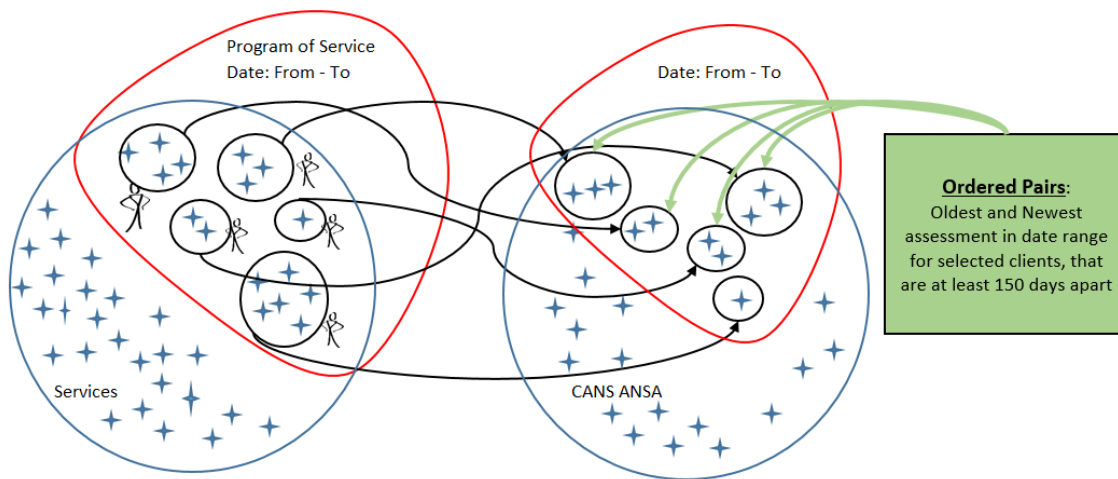
Continue discussing report design, consider sample below:

Programs: (List Programs of Service Selected)
Service Date Range: (List date range selected, i.e. 7/1/16 - 6/30/17)
CANS/ANSA Date Range: (List date range selected, i.e. 4/1/16 - 6/30/17)
(Detail)
Ordered Pairs:

Client Name	Client Number	Oldest Date	Count of Items 2 or 3	Newest Date	Count of Items 2 or 3	Improved (Y/N)
Sam Tttest	111111	4/20/16	41	4/30/17	37	Y
Frankie Tttest	333333	8/15/16	35	2/24/17	36	N
Max Tttest	222222	6/2/16	25	6/15/17	22	Y

(Summary)
Total count of Clients: 3 Total count of Clients Improved: 2 Improvement Rate: 67%