

**Avatar Process Improvement Meeting
Agenda**

Meeting Date

Friday, 8/18/2017

9:00-10:00 AM, 1400 Emeline, 2nd Floor, Conference Room 207

Agenda Items	By Whom	Notes	Minutes
1. Projects in Process	a) Admission, Update Client Data, Discharge changes b) SUD Treatment Plan c) CANS ANSA report (to IT group)		a) To LIVE week of 8/21/17 b) UAT review for final approval, simultaneous work on final Documentation, plan to begin using 9/1/17 c) To IT group
2. CSI reporting	Adriana Bare	State Requirement, review workflow, most usual errors and number of missing CSI Admissions.	Need one CSI Admission for each episode, tools are widget and caseload report. We are about 20% compliant with reporting right now.
3. User / Practitioner clean-up and reporting	Adriana Bare	Sent modified files to Encompass and Front St to refine procedure. List of data fields: Active, Division, Supervisor, User ID and Name, Last Log in Date, Practitioner ID and Name, NPI, Taxonomy code, Gender, Language, Ethnicity, License number, state and type, termination date, Practitioner categories, discipline and credentials.	Add issue date and expiration to the spreadsheet Change Termination date name to "Avatar Termination Date". Avatar Contractor key contact list
4. New Report Design: Pending Routed Documents	From 5/5/17 meeting (if time allows)	All-inclusive report listing all items pending approval by Staff, Supervisor and form. Need: Client # name, routed date, days pending, program, clinician, routed person, practitioner categories for both.	Progress Notes, Treatment Plans, Psychosocial, ASAM Assessment Summary, Risk Assessment, all routed document
5. Next Meeting	8/25/17 Room 207 , 1400 Emeline 2 nd Floor.		
6. Additional Items waiting to be scheduled		<ul style="list-style-type: none"> • ALOC form creation (Waiting for Riverside form) • State reporting: CSI • State reporting: CalOMS • Calendar functions and available features 	

	<ul style="list-style-type: none">• SUD use of appointment scheduler for service timeliness• Admission Bundles, existing and creating new. (Cole Kortlever)
7. Attendees	Esther Orellana, Rose George, Wendy Ettinghoff, Inbal Yassur, Nancy Mast, Chris McCauley, Sergio Lopez, Adriana Bare, Lynn Harrison, Sarah Tisdale, Karolin Schwartz, Claire Friedman