

## Avatar Process Improvement Meeting

### Agenda

#### Meeting Date

**Friday, 2/2/2018**

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

Agenda Items	By Whom	Notes	
<b>1) DMC-ODS update</b>	SUD staff	<p>a) Progress Notes</p> <ul style="list-style-type: none"> <li>- Staff need to come back to the group with recommended Workflows for when Start and End time fields will be required, and residential template</li> </ul> <p>b) Adult ALOC form</p> <ul style="list-style-type: none"> <li>- Sergio was able to fix the Medication field. He also carried some of the same fixes to the Adolescent form.</li> <li>- Gian will make outstanding corrections to the form:</li> <li>- He'll change the form name to Adult ALOC Assessment and move it to the menu with other Santa Cruz Assessments (Avatar CWS/Assessments/Santa Cruz Forms; Add sequestered programs to the form; See if it's possible to add Draft/Final, if not Auto Save; Change Consumer to Client in the field names; Lock Dictionaries; Add event logic to the Referred to field.</li> </ul> <p>c) Adolescent ALOC form (review change request)</p> <ul style="list-style-type: none"> <li>- Sarah Tisdale will write up change requests, send to Adriana and Gian. Adriana will review, ask follow up questions and discuss with Gian. Once changes are in UAT, the form will be looked together in the meeting to approve and move to LIVE.</li> </ul>	
<b>2) Final recommendation for Group services workflow, and how to use the Group Note form</b>	SUD staff	<p>Review testing scenarios and confirm recommended workflow for groups including clients who are:</p> <ul style="list-style-type: none"> <li>- In Sequestered and Consented programs</li> <li>- Over and Under 21 clients</li> </ul>	<p>For SUD groups with mixed participants, when adults over and under 21 are in the same group. This also affects groups of all ages with clients who have consented and those in sequestered programs.</p> <p>Adult programs for 18 to 20-year old need to have two different service codes based on Age. To avoid orphan groups, make sure all notes have group name and number in group, also use the append note capability when applicable. If possible read through all notes in the group before Approve/Reject to avoid having to reject single notes.</p> <p>When there's mixed ages in a group, use workflow to alert AskQI, use the code that fits the majority of the group, send notification to ask QI following established procedure.</p>

			Sequestered program will pop up under the –DO NOT EDIT FIELD --- in the individual section, as blank and we will need to edit these for sequestered clients.
<b>3) Spanish characters: á, é, í, ó, ú, ñ</b>	All staff	Field labels and fields do not accept Spanish characters. Review update from Netsmart.	Notified Netsmart of the importance of this request to be cultural competent. Netsmart needs to change the display coding to include international characters. It affects the whole system, so it requires significant testing. We continue to ask for updates. We will reach out to other Netsmart counties and see what they do. We will send out an email through Bay QIC, also use the Sacramento contact.
<b>4) Service Request and Disposition Log</b>		How to use the form, especially for Gate programs. Existing vs potential clients.	Always connect the form to an existing client. Admit client to REGISTRATION and FINANCIAL program if there is no existing client by committing to 5 elements, Name, Gender, DOB, Address, and Phone Number. Reviewed workflow and it will be sent out separately
<b>5) Future Agenda Items</b>		<ul style="list-style-type: none"> <li>- Review recommended changes to Psychosocial form, once they are available in UAT</li> <li>- Review Start/End time fields in the Group progress note</li> <li>- Co-Staff new requirements</li> <li>- Integrated Psychosocial with CANS/ANSA – Need the envelope with the attached dictionaries</li> </ul>	
<b>6) Next Meeting</b>	Next meeting: 2/9/18 Room <b>207</b> , 1400 Emeline 2 <sup>nd</sup> Floor.		
<b>7) Attendees</b>	Linda Cosio, Rose George, Esther Orellana, Jeff Burt, Sharon Polak, Gian Wong, Cybele Lolley, Lynn Harrison, Emilly Sellers, Claire Friedman, Briana Kahoano, Karolin Schwartz, Sarah Tisdale, Stan Einhorn, Adriana Bare		