

**Avatar Process Improvement Meeting  
Agenda**

**Meeting Date  
Friday, 2/9/2018**

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

Agenda Items	By Whom	Notes	
<b>REMINDER: How to get to UAT to test the work we do in this meeting</b>		<ul style="list-style-type: none"> <li>- Ask for help from your help desk, who will guide you to create a shortcut pointing to: <a href="https://santacruzuat.netsmartcloud.com">https://santacruzuat.netsmartcloud.com</a></li> </ul>	
<b>1) DMC-ODS update</b>	SUD staff	<ul style="list-style-type: none"> <li>a) Progress Notes               <ul style="list-style-type: none"> <li>- Still pending: Staff need to come back to the group with recommended Workflows for when Start and End time fields will be required – Related issue with services in the calendar needs more research, and residential template</li> </ul> </li> <li>b) Adult ALOC form               <ul style="list-style-type: none"> <li>- Gian update on changes – Outstanding changes have been done and uploaded to UAT, staff need to review them and approve so they can be moved to LIVE. Will revisit next Friday.</li> </ul> </li> <li>c) Adolescent ALOC form (review change request)               <ul style="list-style-type: none"> <li>- Sarah submitted the list of items to change. Most of them related to the Severity scores, bringing the options in line with the Adult list. This list is going to Gian, who will make changes in UAT. Then we will review and move to LIVE</li> </ul> </li> </ul>	
<b>2) Co-Staff new requirements</b>	All Staff	<p>MHSUDS INFORMATION NOTICE NO.: 18-002. There's a NEW state requirement to submit a separate claim for each provider in the service. We need to discontinue using Co-Practitioner time and instead write 2 separate notes</p>	<p><a href="http://www.dhcs.ca.gov/services/MH/Documents/FMO_RB/MHSUDS_Info_Notice_18-002-Co_Practitioner_Claim_Submissions_Final.pdf">http://www.dhcs.ca.gov/services/MH/Documents/FMO_RB/MHSUDS_Info_Notice_18-002-Co_Practitioner_Claim_Submissions_Final.pdf</a></p> <p>This requirement applies to services currently being co-facilitated by two staff. We will no longer utilize the Co-Practitioner fields in our notes and each practitioner would write their own notes.</p> <ul style="list-style-type: none"> <li>- Each practitioner will write their own note, instead of listing times for both staff in one note.</li> <li>- Each note will include the time it took to document</li> <li>- QI is available for questions and training, a one-page description will be shared with this group to disseminate.</li> <li>-</li> </ul> <p>Please share this information in your agency/team.</p> <p>Co-Staff fields will be turned off on <b>3/1/18</b> from our 3 progress note forms: <b>SC General</b></p>

			<p><b>Purpose Progress Note, SC Med Service Progress Note and SC Group Progress Note</b>  Staff can begin writing separate notes now. All co-facilitated service documented after 3/1/18 will need separate notes.</p>
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Practitioner	Face-to-Face	Other Time	Total Duration (minutes)
USER ROLE TEST (000022)	60	15	75
TEST NETSMART (006000)	60	0	60

<p><b>3) Client Caseload Assignment</b></p>	<p>All Staff</p>	<p>Review new widget, provide feedback and test.</p>	<p>Users will be able to see other staff involved with a particular consumer, when the client is selected. The widget is called “Client Caseload Assignment” and can be found in the HOME screen when you log into UAT. Requesting 2 changes to the widget:</p> <ul style="list-style-type: none"> <li>- Format dates for both From &amp; To, using MM/DD/YYYY.</li> <li>- Add the program name and parenthesis around the program code. Program Name(Program Code) i.e. <i>County – Pre Admit Outpatient (CO-PREAMD)</i></li> </ul> <p>Staff should log in to UAT and test this widget so we can recommend to move it to LIVE. Reminder: To see new widgets available to a view are hidden until the view is refreshed. Click on Preferences, Widgets tab, Reload Home View button, and Apply button.</p>
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<p><b>4) KPI Analytics project</b></p>	<p>SUD and MH staff who need Analytics</p>	<p>Update on the progress of the project next steps and gather input</p>	<p>Data Analytics tool that uses demographic, clinical and financial information from Avatar, for the last 2 full fiscal years. The technical issues relating to limiting data access appropriately, have been resolved, so project is back on track. Demographic mapping for some fields like homeless are being worked on now. Target to be finished in mid-March. We will discuss what shared widgets we would like to have shared among us. Agencies need to identify the one</p>
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			person who will have access for their group, if they would like to assign this access.
<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>- Integrated Psychosocial with CANS/ANSA discussed in training <ul style="list-style-type: none"> <li>– Need the envelope with the attached dictionaries</li> </ul> </li> <li>- CANS/ANSA should items move forward when entering an update? Which ones?</li> <li>- CSI workflow review for clients born out of state</li> <li>- Some items in the psychosocial assessment, when the client stops collaborating still need to be answered and might need a third option besides yes/no</li> </ul>	
<b>6) Next Meeting</b>	Next meeting: 2/16/18 Room <b>207</b> , 1400 Emeline 2 <sup>nd</sup> Floor.		
<b>7) Attendees</b>	Linda Cosio, Laura Davis, Chris McCauley, Meg Sandow, Kathleen Alcala, Gian Wong, Stan Einhorn, Nancy Mast, Cybele Lolley, Andrea Turnbull, Sarah Tisdale, Jeff Burt, Adriana Bare, Rose George, Christine Garcia, Briana Kahoano, Claire Friedman		