

Avatar Process Improvement Meeting Agenda

Meeting Date

Friday, 2/16/2018

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

Agenda Items	By Whom	Notes	
REMINDER: How to get to UAT to test the work we do in this meeting		- Ask for help from your help desk, who will guide you to create a shortcut pointing to: https://santacruzuat.netSMARTcloud.com	
1) DMC-ODS update	SUD staff	a) Progress Notes - 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 b) Adult ALOC form - Report back, final review in UAT to see if it can be moved to LIVE. We will move the form to LIVE on Tuesday. Report any problems immediately. c) Adolescent ALOC form - Gian made changes and form is ready to review in UAT. - Staff will review the form and discuss again next Friday.	
2) Client Caseload Assignment	All Staff	Review widget, decide if approved for LIVE. <small>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:</small> <ul style="list-style-type: none"> - Format dates for both From & To, using MM/DD/YYYY. <small>Add the program name and parenthesis around the program code. Program Name (Program Code) i.e. County – Pre Admit Outpatient (CO-PREADM)</small>	We had mixed results with this widget. Encompass was able to see the information for some clients and for others it remained blank. Front St was not able to see information, even for clients in the users own caseload. Both will securely send specific client and user information to Gian, so he can problem solve what might be causing this. We will discuss again on Friday.
3) CSI workflow	MH Staff	Review how to notate client's place of birth	Discussed workflow how to enter place of birth for clients who were born locally, in other California counties, other states or countries. See clarifying notes below at the bottom of this document. Education in admission refers to current education grade. CSI state reporting requirements apply to all admission episodes. Currently, staff can review compliance by checking their caseload report for their client's CSI status (at bottom for each client). For example:

Action: Poll staff to determine if we should create a CSI focused report. Some ideas discussed: Run report by program of admission, open as of a specific date. Determine which other information needed. Perhaps Program of service, last service by, and show the 22 CSI items in a grid form so it can be exported and parsed out to the responsible parties.

4) CANS/ANSA – which items should move forward

MH Staff

Which items should move forward when creating a new Assessment?

CANS/ANSA has 2 main purposes, 1) Create a common language to communicate with the client 2) Identify areas of treatment focus. For example, by including goals related to items scoring 2 or 3 in the client’s treatment plan.

Some staff proposed that we modify CANS ANSA form to move forward scores from the last assessment performed. We discussed this might make it harder for users to see which items to update and make them artificially report no change, when change exists.

We recommend that this be discussed more in depth in sub groups including clinical staff directly using the tool and their supervisors. We ask that these groups focus on workflow first, not on form changes. Once the workflow is clear, review current reports to determine preferred method to determine the scores for the prior 6 months, determine if we need to create or modify supporting reports to make both the Treatment planning application, and updating the assessments easier to accomplish.

Technical possibilities on the form include:

- Determining the subset of items that should move forward to the updated assessment.
- Determine if staff might want to have the disabled fields currently grayed out, become invisible, with the understanding that fields will not move from current location and might make them look like they are floating in the page.

The sub groups should also compare our CANS tool with the state requirement and see if there are some elements required only by us, that we might recommend to eliminate, or make optional.

			<p>The ANSA is not quite in the same position, since there's no published State requirement. Comparisons could still be made with other State versions, like the Indiana version, to recommend changes in which items are required for us.</p> <p>The Focus /sub groups should also discuss both content and formatting (color, font size, etc.) for the help language in the "Lightbulb" messages. Evaluate whether it makes sense to eliminate them and point to a larger manual, or continue to provide help language for each item individually.</p> <p>We will discuss this item again on Friday 3/16/18 and review progress so far.</p> <p>Links to source documents: State Required CANS from MHSUD Info Notice 17-052, Enclosure 3 Indiana Version from PRAED foundation</p>
5) Psychosocial Assessment	MH Staff	Some items might need an option for Assessments interrupted before completion.	Not discussed
6) Future Agenda Items		- Review recommended changes to Psychosocial form, once they are available in UAT	
7) Next Meeting		Next meeting: 2/23/18 Room 207 , 1400 Emeline 2 nd Floor.	
8) Attendees		Linda Cosio, Emily Sellers, Nancy Mast, Esther Orellana, Cole Kortlever, Kathleen Alcalá, Sarah Tisdale, Gian Wong, Karolin Schwartz, Meg Sandow, Chris McCauley, Briana Kahoano, Adriana Bare, Claire Friedman, Eli Chance	

CSI Place of Birth - Clarified

When filling out Place of Birth in the CSI Admission Form, fill out all 3 Place of Birth fields. Follow the examples below depending on where the client was born: Locally, elsewhere in California, out of state or internationally.

TESTFORCCD TTTEST (000103017)
M, 68, 07/03/1949

Ep: 18 : Telecare - Santa Cruz Adult Crisis Stab
Problem P: -
DX P:

CSI Admission

Place of Birth - County

Place of Birth - State

Place of Birth - Country

Submit

Online Documentation

1. If born locally:

- a. Click on **Place of Birth – County** and select Santa Cruz

Place of Birth - County: Santa Cruz

Place of Birth - State: California

Place of Birth - Country: United States

- b.

2. If born elsewhere in California:

- a. Click on **Place of Birth – County** and select the appropriate County, or

Place of Birth - County: Orange

Place of Birth - State: California

Place of Birth - Country: United States

- b.

- c. If you know the client was born in California, but are not sure which county, Click on **Place of Birth – County** and select “Unknown County”

Place of Birth - County: Unknown County

Place of Birth - State: California

Place of Birth - Country: United States

- d.

3. If born out of state, elsewhere in the United States:

- a. Click on **Place of Birth – County** and select “Not California County”, which activates **Place of Birth – State** field where you click to select the appropriate state.

Place of Birth - County **Not California County**

Place of Birth - State **Oregon**

Place of Birth - Country

United States

- b.
- c. If you know the client was born in the United States , but are not sure which state, after you select “Not California County”, Click on **Place of Birth – State** and select “Unknown State”

Place of Birth - County **Not California County**

Place of Birth - State **Unknown State**

Place of Birth - Country

United States

d.

4. If born outside of the United States:

- a. Click on **Place of Birth – County** and select “Not California County”, which activates **Place of Birth – State** and select “Not US State”, which activates **Place of Birth – County**. Type the name of the country and select it from the list.

Place of Birth - County **Not California County**

Place of Birth - State **Not US State**

Place of Birth - Country

Mexico

Results

Mexico

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- b.
- c. If you know the client was born outside the United States, but don’t know where: Click on **Place of Birth – County** and select “Not California County”, which activates **Place of Birth – State** and select “Not US State”, which activates **Place of Birth – County** and Select “Unknown Country”

d.

Place of Birth - County **Not California County**

Place of Birth - State **Not US State**

Place of Birth - Country

Unknown

Results

Unknown Country

e.