

Avatar Process Improvement Meeting

Agenda

Meeting Date

Friday, 4/27/2018

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

Agenda Items	Staff Area	Notes	
REMINDER: How to get to UAT to test the work we do in this meeting		<ul style="list-style-type: none"> - Ask for help from your help desk, who will guide you to create a shortcut pointing to: https://santacruzuat.netsmartcloud.com 	
1) Residential Service note template	SUD staff	Review sample template in UAT, decide if it's ready to move to LIVE	When testing widgets, remember to "Reload Home View", so the new widget is visible. Under review, will discuss next week. Template to test is loaded under service intervention in UAT. Consider if the other fields should also be available for residential notes and whether that will mean we don't need a separate type.
2) Brief ASAM form	SUD/ Access	Should we create a Brief ASAM form in Avatar? What workflow will we implement to use it?	Used by Access, Service Coordinator, all screening team serving Adults. We have a current workflow that uses a paper form, includes faxing to provider, scanned into the record. Lynn will reply to all with the attached form, be prepared to discuss next week to design the form we'll ask to create in Avatar. Which fields in which order, single or multiple select, text, etc.
3) DHCS Audit follow up	MH staff	<ul style="list-style-type: none"> • Workflow and/or form changes to address state's view regarding treatment plan being valid for 12 months after the LPHA signature date <ul style="list-style-type: none"> ○ Review information from the signature scenario research 	We had an initial discussion for one possible with least amount of change. Renaming "Authorization Start and End" Dates to Target dates, which will still be tied to the episode opening and only be used for organization purposes, so we can have a predictable cycle that is not based on ever changing date solely based on signature. We will also need to make the signature dates easily available in the chart view. Gian will do further research how the Chart View report needs to be changed. The LPHA approved date needs to be easily found and highlighted, since it becomes the new deadline. A plan can be shorter, but never longer than 365 days. We might also consider removing the End Date, since that might create confusion.

	Notification Date	Start Date	End Date	Clinician FINAL Submit Date	LPHA Approved Date	# of Days
Year 1		7/1/2017	6/30/2018	8/1/2017	8/8/2017	
Year 2	6/1/2018	7/1/2018	6/30/2019	6/15/2018	6/18/2018	314
Year 3	6/1/2019	7/1/2019	3/30/2020	6/8/2019	6/15/2019	362

			<p>Will consider what else is possible next week. For example, if we abandoned the From-To dates altogether.</p> <p>The workflow is:</p> <ol style="list-style-type: none"> 1) Clinician assesses client and starts developing plan with client and supervisor input 2) Clinician and Client complete plan. 3) Client Signs 4) Clinician submits FINAL plan and routes (if not LPHA) 5) Supervisor/LPHA approves <p>We must remember that the plan is valid for “up to” 365 days after date of item 5)</p>
4) Psychosocial Assessment Change	MH Staff	Review changes in UAT, ready to move to LIVE?	Migrated to LIVE on 4/23/18. No problems reported.
5) Last Assessment Widget	All Staff	<p>New widget we are testing. It is difficult to test this is accurately showing the latest dates in UAT so it will be loaded in LIVE</p> <p>Asked to add: ALOC, CANS/ANSA</p>	<p>Will add “ASAM Re” (ASAM Reassessment) to the form list, and also only calculate the red status “Need Update” based on the following:</p> <p><u>Required for MH episodes:</u> Annual=Psychosocial, MSE, 6-month=Diagnosis</p> <p>Required for SUD episodes: Annual=Diagnosis, at least one ALOC and “ASAM Re”</p>
6) Episode Closings	All Staff	Review current workflow for closing of client’s episodes and determine if we need to recommend a change or a supporting report to eliminate clients being left open without service activity.	Will save for later, think about recommended workflows for closing episodes.
Future and Pending Agenda Items		<ul style="list-style-type: none"> ➤ Diagnosis in Episode widget does not change when updated, should it show most current or admission dx? ➤ Network Adequacy follow up to additional items needed ➤ Caseload Report changes - Diagnoses (dates and clinician), ASAM information ➤ Pending notes report ➤ Discuss adding Age to Home view (new widget?) ➤ Clear start end time for documentation 	
7) Next Meeting		Next meeting: LOCATION CHANGE 5/4/18 in Room 164, 1400 Emeline 1st Floor.	
8) Attendees		Claire Friedman, Lynn Harrison, Karolin Schwartz, Nancy Mast, Karen Luxon, Stan Einhorn, Kathleen Alcalá, Inbal Yassur, Cybele Lolley, Gian Wong, Adriana Bare, Cole Kortlever	