

Avatar Process Improvement Meeting

Agenda

Meeting Date

Friday, 6/15/2018

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		- Ask for help from your help desk, who will guide you to create a shortcut pointing to: https://santacruzuat.netsmartcloud.com	When testing widgets, remember to “Reload Home View”, so the new widgets are visible.
1) Residential Service note template	SUD staff	Review sample template in UAT, decide if it’s ready to move to LIVE. Consider if same template for SUD and MH residential. Consider if other fields besides intervention should be open. Consider if we need change to “Progress Note Purpose” options.	Testing is not complete, will follow up next time. Staff will review template as well as the possibility of opening or requiring other fields in the note, much like we currently do in the outpatient note. Then determine if we need to separate the types.
2) DHCS Audit follow up	MH staff	<ul style="list-style-type: none"> • Review current UAT testing for workflows that require LPHA user to submit plan • Review current UAT report listing treatment plans that need attention ○ Supporting tools needed: <ol style="list-style-type: none"> 1. To-Do reminders: Next review date s/b 350 days from Final date. Participants need to include LPHA so they also receive reminder. 2. Widget: Add Tx Plan due date related to LPHA signature with color formatting to Last Assessment Date widget or create new one 3. Report: Add Tx Plan LPHA signature date and due date to Current Caseload report, or create new report 4. Research and discuss UR workflow we can turn on to validate Progress Notes with Tx Plans. 	<ul style="list-style-type: none"> - Briefly discussed LPHA submission edit. We will schedule a separate meeting with QI to review the scenarios being tested and its findings, to discuss options with the group next time. - Reviewed “Expiring Treatment Plans” report and asked for 2 modifications: <ul style="list-style-type: none"> ○ Instead of running the data from PARTICIPANTS, we will request the filter to run the report look at clients in that particular staff caseload at the time we are running the report ○ We also asked if clients in the caseload who are missing Tx Plans altogether also could be added. So we have a complete list of Tx Plans needing attention, those expiring, plus those not completed yet. - Discussed most efficient display of information for staff with over 30 clients. We will re-visit this once we can look at the report with some data in it. - Requested that the computer have “Report Viewer” Installed so we can look at the report together.
3) Last Assessment Widget	All Staff	New widget we are testing in LIVE because we need real scenario data to see if it’s correct.	Not discussed.

		Asked to add: "ASAM Re" and Tx Plan dates Review widget and see if it's now complete.	
4) CANS / ANSA		CANS reviewed by County staff – items to disable identified. Review with group and determine if it's ready to proceed. Request status report for same activity for ANSA.	Not discussed.
Future and Pending Agenda Items	<ul style="list-style-type: none"> ➤ Brief ASAM form in Avatar ➤ Episode Closings: Analyze and recommend workflows for closing episodes, including what tools are needed for support ➤ 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 ➤ Discuss ROI in onset of services form, (ability to click on the boxes) 		
5) Next Meeting	Next meeting: 6/22/18 in Room 207, 1400 Emeline 2nd Floor.		
6) Attendees	Amber Williams, Linda Cosio, Claire Friedman, Lynn Harrison, Kathleen Alcala, Dave Chicoine, Nancy Mast, Cybele Lolley, Emily Sellers, Adriana Bare.		