

Avatar Process Improvement Meeting Notes

Meeting Date

Friday, 8/10/2018

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

Meeting identity and mission	Inclusive, collaborative, focused, agenda driven, <u>Continued Improvement Process</u> to meet new state and federal requirements, improve client care and staff experience. This group gives us the opportunity to: Share our voice and needs to impact policy, create and modify forms, reports and queries. Also requires our commitment to: bring information back to our respective groups, gather opinion and test current projects to ensure they meet our needs, as well as share the finalized recommendations back with the staff we represent.
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Agenda Items	Staff Area	Notes
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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 <p>When testing widgets, remember to "Reload Home View", so the new widgets are visible.</p>
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1) Last Assessment Widget	All staff	<p>The conversation this week centered around the "Last Assessment Date" widget:</p> <ul style="list-style-type: none"> •Defining and making sure staff understand what each column represents and where the dates come from •Ensuring all compliance related items are listed in the widget •Reviewing, and possibly changing, the logic used to determine when it should say "Current" or "Need Update" for each of the episode lines. <p>We had a successful test of the widget for both and SUD and a MH episode. (Yay!) We discussed a few tweaks to the widget to make it easier to see/use, which Gian will work on.</p> <ol style="list-style-type: none"> 1) If a form is complete, the date will be green. 2) If a form is in draft, the date will be in red. 3) If a form is missing entirely, there will be a red "X" 4) For forms that are not required (e.g. CANS/ANSA for an SUD episode) we will leave blank. 5) Gian will see if he can add light grey and white striping to help make the widget easier to read. 6) Will also add logic for treatment plans. Plan date is in widget. <ol style="list-style-type: none"> a. If plan is finalized and current (<1 year old for MH plans and <75 days for SUD plans) the Plan Date will be green. b. If most recent plan in chart is in draft, date will be present, but it will be red, no matter how old the date is. c. If there is no recent plan in chart at all, there will be a red "X" (>1 year old for MH plans and >75 days for SUD plans) <p><u>In order to be "Current" the following must be true:</u></p>
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Last Assessment Date		Status	Psychosocial	MSE	Diagnosis	CANS	ANSA	ALOC	ASAM	RE	TX PLAN
19	LE - 00044 MH COUNTY OUTPATIENT	Current	08-07-2017	08-07-2017	08-07-2017	02-14-2018					01-12-2018
194	LE - 00439 MH VOLUNTEER CENTR OUTPATIENT	Need Update			09-29-2016	02-14-2018					09-07-2017
116	LE - 00442 MH FRONT STREET OUTPATIENT	Need Update			02-23-2018	02-14-2018					07-06-2018

		<p>MH</p> <ul style="list-style-type: none"> • Psychosocial, MSE, and Diagnosis < 1 year old (All 3 are required and be less than 1 year old) • CANS ANSA < 6 months old • TX plan date < 365 days old • CSI is complete (does not check scoring) <p>SUD</p> <ul style="list-style-type: none"> • Diagnosis < 1 year old • ALOC is available • ASAM RE is available (removed check if is < 10 days old) • TX plan date < 75 days old • CalOMS is complete
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2) Episode Widget	All Staff	The episode widget shows admission diagnosis. Is that appropriate? Should we ask for most recent diagnosis to display instead?
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Client Episodes Diagnosis							
Episode Number	Admit Program	Admit Practitioner	Attending Practitioner	Admit Date	Discharge Date	Dx Type	Primary Diagnosis
196	Telecare - Santa Cruz Adult Crisis Stab	MAYO,TRISTAN L		04/16/2018	04/17/2018	A	Bipolar disorder, unspecified
195	Telecare - Santa Cruz Adult Crisis Stab	ROLEWICZ,DAESHA		01/30/2017	01/31/2017	A	Schizoaffective disorder, unspecified
194	LE - 00439 MH VOLUNTEER CENTR OUTPATIENT	LAWLER,KEVIN		09/07/2016		Open Episode U	Schizoaffective disorder, unspecified
193	Encompass - Adult Respite Residential	BERNARD,ADRIAN M		01/31/2016	02/06/2016		Missing Diagnosis

3) Client Info Widget	All Staff	Should we add a widget to quickly see key information for a client like: Name, Age, Address, Phone number?
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Future and Pending Agenda Items	<ul style="list-style-type: none"> ➤ Brief ASAM form in Avatar – Access to services workflow ➤ Episode Closings: Analyze and recommend workflows for closing episodes, including what tools are needed for support ➤ Network Adequacy follow up to additional items needed ➤ Caseload Report changes - Diagnoses (dates and clinician), ASAM information ➤ Pending notes report ➤ Discuss ROI in onset of services form, (ability to click on the boxes)
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1) Next Meeting	Next meeting: 8/17/18 in Room 207 , 1400 Emeline 2 nd Floor.
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2) Attendees	Nancy Mast, Esther Orellana, Pam Rogers-Wyman, Steve Capasso, Kathleen Alcala, Gian Wong, Lynn Harrison, Emily Sellers, Karolin Schwartz
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