

Avatar Process Improvement Meeting Agenda

Meeting Date

Friday, 9/14/2018

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.		
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) Treatment Plan	All Staff	Report back after testing form with additional LPHA date, removing routing in UAT for both Episodic and Short Term Tx plan, to fix the workflow problem created for SUD Tx plan	Cybele, David, Esther report successful testing. Staff was unable to confirm that non-LPHA user's workflow also works well. Confirming workflow today is the priority, followed by moving the changes to LIVE. Once completed Nancy will reply all to this meeting's distribution list for an early communication, while the official QI information is sent out.
2) Data Corrections	All Staff	Increased volume. Cannot keep up with demand.	Staff request feedback on which programs and staff have repeated patterns of errors that must be edited with the intention of following up with specific users or programs to deploy additional training. One of the patterns identified relates to the use of Group Progress notes. <u>Reminder:</u> We have Group Progress Note Trainings available the first Thursday of the Month at 2:30 in the computer lab. No drop ins allowed, please register by requesting a slot directly with Nancy Mast.
3) CSI compliance update	MH Staff	Share state required fields and where they are in the Avatar forms we use.	Background: CSI stands for Client Service Information and is a state reporting requirement for non-FQHC Specialty Mental Health Services. The state can inflict fines to the county based on compliance with reporting of this data. Prior to 2007 MH state reporting was episodic, similar to SUD's CalOMs requirement. Data reporting is based on service information (progress notes), with additional information that is stored in the corresponding admission episode, CSI admission, discharge and diagnosis. Current caseload report shows a marker that counts how many out of 22 items are available. These 22 only relate to information in CSI admission form. This is a large portion, but not the everything required by the state.

Please refer to 2 files attached to the email that distributed these minutes called: “CSI state required items” (what the state expects we will report) and “Avatar forms with CSI required items highlighted” (items that will be reported with our CSI submission, for the corresponding episode information for each service)

Group discussion and recommendation for next steps:
 We should approach this project in stages, so we can move from where we are to complete compliance. For example, Evidence Based Practices/Service Strategies indicators and items in the “Additional Diagnosis information” tab in the Diagnosis form, which are not currently routinely filled out by staff.

Stage 1: Now

- Goal: collect CSI Admission data for all non-FQHC specialty mental health services.
- Monitor compliance with bi-weekly agency-wide report and by using the CSI indicator from the “Current Caseload” report and “Last Assessment” widget
- Currently we have between 50% and 80% compliance for child and adult episodes.

Stage 2: (Oct 15th)

Goal: Consistently collect 4 items from the Additional tab in Diagnosis form

- Need targeted training and communication strategy to roll out the information in layers. Making sure managers and supervisors understand the requirement and can support line staff in meeting it.
- Create clinical manual for this form, class curriculum and schedule classes to cover the topic.

Stage 3: (Jan 1st)

Goal: Collect All state required data from all forms involved (Admission, CSI admission, discharge, diagnosis, progress notes)

- Create a thoughtful EBP/SS training so staff understand when to tag their services with service strategies and when they are certified to use EBPs.
- Create a complete monitoring report that allows staff to see if clients they have served/are in their caseload are compliant with all items and show which ones are missing.

4) Episode Widget

All Staff

Confirm this widget update is working properly and is ready to move to LIVE.

Not discussed

Episode Number	Adult Program	Adult Practitioner	Attending Practitioner	Adult Date	Discharge Date	Discharge Type	Primary Diagnosis
196	Tobacco - Santa Cruz Adult Crisis		NAHLY, TRESTAN L	09/16/2018	09/17/2018	A	Bipolar disorder, unspecified
195	Tobacco - Santa Cruz Adult Crisis		BOLEWICZ, DHESHA	01/28/2017	01/31/2017	A	Schizophrenia, unspecified
194	LE - 04289 MH VOLUNTEER CENTR OUTPATIENT		LAHLER, KEVIN	09/07/2014	Open	U	Schizophrenia, unspecified
193	Encorepoint - Adult Respite Residential		BERNARD, ADRIAN H	01/21/2016	06/29/2016		Major Depressive

Future and Pending Agenda Items

- Episodic ALOC form status
- CANS 6-20 to edit, CANS 0-5 9/21/18, ANSA 9/28/18
- Client Info Widget: Should we add a widget to quickly see key information for a client like: Name, Age, Address, Phone number?
- Brief ASAM form in Avatar – Access to services workflow

	<ul style="list-style-type: none"> ➤ 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)
1) Next Meeting	Next meeting: 9/21/18 in Room 207 , 1400 Emeline 2 nd Floor.
2) Attendees	Esther Orellana, Linda Cosio, Emily Sellers, Cybele Lolley, Eli Chance, Karolin Schwartz, Nancy Mast, Bill McCabe, Sarah Tisdale, Andrea Turnbull, Briana Kahoano, Amber Williams, Gian Wong, Adriana Bare
Web Conference Call information: https://ocean-aacca.co.santa-cruz.ca.us/797781 Meeting ID code is: 797781 Phone number for audio: (831)454-2222	