

## Avatar Process Improvement Meeting Agenda

**Meeting Date**

**Friday, 11/30/2018**

**9:00-10:00 AM, 1400 Emeline, 2<sup>nd</sup> Floor, Conference Room 207**

<b>Meeting identity and mission</b>	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 both 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	
<b>REMINDER:</b> 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: <a href="https://santacruzuat.netsmartcloud.com">https://santacruzuat.netsmartcloud.com</a>	When testing widgets, remember to "Reload Home View", so the new widgets are visible.
<b>1) Supervisor Compliance Report</b>	All Staff	Review recommended changes, report back results and staff feedback	<p>Target date (change to: "Open admissions/episodes as of this date") = Admission date is less than or equal to Target Date, and Discharge date is either greater than or equate to target date or missing (still open)</p> <p>Staff = report will show clients assigned to this staff under caseload assignment form</p> <p>Supervisor = report will show clients assigned to staff who are connected to this supervisor (through the User Definition form), grouped by staff</p> <p>Episode program (change to: "Admit/Episode program") = (MAKE at least one selection REQUIRED) This selection is used to target the episodic information, sometimes we will focus on just one LE, or one program. Other times we might want to compare 2 programs and see their separate compliance. Each program will be a line of data. Since this field is not currently required, if we don't select one particular episodic program, all open episodes for that client will show as separate lines. (Consider if in future we need to create a simple report that shows a target staff person, who supervises them and which other staff they supervise, to ensure we are able to keep supervisory data correct and up to date)</p> <p>NEED to add in the documentation:</p> <ul style="list-style-type: none"> <li>- list of which columns display on the report when first program is a MH program or SUD program: These columns should be sorted in order of compliance impact left to right. Staff will provide input in this order.</li> <li>- definition for each column: what it will display, under which circumstances, from which form</li> <li>- definition/criteria for color coding and determining compliance: for each column, when is it green, red, black, yellow highlighted, etc</li> </ul>
<b>2) Current Caseload Report</b>	All Staff	Review change requests for the Current Caseload report, and other feedback from staff regarding this report.	Not discussed
		- Adding diagnosis date	
		- Adding ALOC dates	
		- Discuss removing some historical data	

<b>3) Report for note timeliness</b>	All Staff	Review recommended changes, report back results and staff feedback. Discuss switch from calendar to business days.	<p>Working on changing the aging calculation from number of calendar days to business days. However, the business day policy only applies to MH programs.</p> <p>Based on the “program_X_sdmc_program_code” field in the “SYSTEM_table_program_definition” table the age calculation will be calendar days for SUD and business days for MH. We are working towards the CMH 48hour goal, with incremental changes in the MH system. We have clear guidelines for 7 calendar days from the state in the SUD system.</p> <p>Staff can use existing report “Progress note aging” report that calculates note age by calendar days, to review detail information with staff, as this report shows each progress note written between 2 dates and its calendar-day age.</p>
<b>4) IT Project review</b>	All Staff	Review list of projects in process and clarify deadlines. Including <ul style="list-style-type: none"> <li>• CANS 0-5 &amp; CANS 5-20 form modifications – State submission deadline Feb 2019</li> <li>• Episodic ALOC form &amp; State submission for data starting 7/1/18</li> <li>• Reporting upgrades</li> </ul>	<ul style="list-style-type: none"> <li>- CANS 6 – 20: changes have been made in UAT and it is ready to test. There are a few required/disabled modules that still need to be edited, since we were originally waiting to a decision with ANSA 21+</li> <li>- CANS 0 – 5: Adriana needs to finish the work order spreadsheet and submit to IT</li> <li>- State report needs to be in production for February 2019 submission. Adriana will attach data dictionary and format to a work order.</li> <li>- Adult Episodic ALOC form: First version is in UAT. Cybele identified issues that Gian will be working on</li> <li>- Adolescent Episodic ALOC form: Michael will be working on it, not yet available to test in UAT.</li> <li>- Non-Episodic state report is loaded in the system, needs to be vetted.</li> <li>- Episodic state report will be worked on after episodic forms are finished.</li> <li>- Gian is working on the Supervisor compliance report and will figure out why it is currently not displaying any data, regardless of the options selected. Gian moved the draft report to LIVE so staff could test with current live data.</li> <li>- Michael is working on the Progress Note Aging Summary report and will incorporate changes requested today.</li> </ul>
<b>Future and Pending Agenda Items</b>	<ul style="list-style-type: none"> <li>➤ Report to evaluate compliance for age of notes and presence of Tx plans</li> <li>➤ Episodic ALOC form: Subcommittee review Adolescent changes</li> <li>➤ Next CSI Compliance Update 12/7/18</li> <li>➤ CANS 6-20, CANS 0-5, (ANSA on hold after data analysis from Praed)</li> <li>➤ Supervisory report for progress notes aging and Treatment Plan coverage</li> <li>➤ Episode Closings: Analyze and recommend workflows for closing episodes, including what tools are needed for support</li> <li>➤ Network Adequacy follow up to additional items needed</li> <li>➤ Pending notes report</li> <li>➤ Discuss ROI in onset of services form, (ability to click on the boxes)</li> <li>➤ New form for Medical History and Physical</li> </ul>		

<b>1) Next Meeting</b>	Next meeting: <b>12/7/18</b> in Room <b>207</b> , 1400 Emeline 2 <sup>nd</sup> Floor.
<b>2) Attendees</b>	Rose George, Chris McCauley, Dave Chicoine, Cybele Lolley, Andrea Turnbull, Claire Friedman, Briana Kahoano, Gian Wong, Michael Garcia, Adriana Bare, Vince Stroth, Karolin Schwartz, Eli Chance, Linda Cosio
Web Conference Call information: <a href="https://ocean-aacca.co.santa-cruz.ca.us/797781">https://ocean-aacca.co.santa-cruz.ca.us/797781</a> Meeting ID code is: <b>797781</b> Phone number for audio: <b>(831)454-2222</b>	