Avatar Process Improvement Meeting Agenda		
Meeting Date **Friday, 12/14/2018** **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 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**
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) New Enhancements Available	All Staff	• Widget templates: 5 pre-defined and ability to define additional ones of our own
		• Assessment mapping to Progress Notes When and how should we use these? We will discuss these new capabilities, so we understand capabilities and are able to poll staff for a priority list of how they might become useful
			We reviewed two enhancements we might choose to use in the future. The intention was for the group to understand what is possible and solicit input from their areas in how we might use these abilities. Please bring ideas back to the meeting on January 11ᵗʰ. If you missed this meeting, and need more information than provided in these minutes, please contact Adriana Bare.
			
			1. <u>Widget Templates:</u> Function in similar ways to our current system templates. They can be accessed in any text field by using right-click. They are organized in categories.
			   a. We currently only have 5 pre-defined ones listed under Client: Active Diagnoses, Current Medications, Current Home Medications, Recent Labs, Recent Vitals.
			Staff should review these in UAT to understand their functionality. And see them append the information pulled from other forms into that text field.
			   b. We are also able to create custom widget templates where we might identify fields from other forms to append into a text field. We can use this in progress notes and other forms with text fields.
			Staff should think of instances where users wish they didn't have to write information multiple times or are forced to copy/paste from one form into another. Or instances where forms (including progress notes) would be more complete if information could be pasted into them directly.
			2. <u>Assessment Mapping to Progress Notes:</u> This function is like the one described above. We can create a new field in our progress notes and map it to another field elsewhere in the system, and have it

			stored with each progress note. This allows us to know what the value was for that piece of information at time we write the note. This is especially useful for studying a value over time, likely for performance outcome studies. Staff should think of instances this might be helpful, either for compliance or for outcome purposes.
3. Supervisor Compliance Report	All Staff	Review recommended changes, report back results and staff feedback. Share first draft of report documentation	This report was not running for multiple people who tried to test it. Gian was able to fix it and it is now running in UAT. He will also install in LIVE so we can test with real client information and see if it's pulling correct information for each of the columns, see if any columns are missing. New suggestion: When we move a report into LIVE to have a richer set of data to test with, we will name the report "Testing xxxxx", so staff can easily find them and signal others involved that the report has not been fully vetted.
4. Report for note timeliness	All Staff	Review recommended changes, report back results and staff feedback. Discuss switch from calendar to business days. Share first draft of report documentation	This report was also not running in UAT for multiple people who tried. Michael is looking into this problem. It might be related to the additional time necessary to calculate working days. Michael will reply/all to this email to let everyone know it is ready to test.
5. Current Caseload Report	All Staff	Review change requests for the Current Caseload report, and other feedback from staff regarding this report. - Adding diagnosis date - Adding ALOC dates - Discuss removing some historical data	Not Discussed
Future and Pending Agenda Items	➢ Report to evaluate compliance for age of notes and presence of Tx plans ➢ Episodic ALOC form: Subcommittee review Adolescent changes ➢ Next CSI Compliance Update 1/10/19 ➢ CANS 6-20, CANS 0-5, (ANSA on hold after data analysis from Praed) ➢ Supervisory report for progress notes aging and Treatment Plan coverage ➢ Episode Closings: Analyze and recommend workflows for closing episodes, including what tools are needed for support ➢ Network Adequacy follow up to additional items needed ➢ Pending notes report ➢ Discuss ROI in onset of services form, (ability to click on the boxes) ➢ New form for Medical History and Physical		
1) Next Meeting	Next meeting:		

	12/21/18 in Room **207**, 1400 Emeline 2nd Floor. Holiday break, no meeting until **Friday, January 11th** and again **Friday, February 1st**, since budget season is starting.
2) Attendees	Lynn Harrison, Esther Orellana, Gian Wong, Adriana Bare, Eli Chance, David Chicoine, Andrea Turnbull, Emily Sellers, Linda Cosio