Avatar Process Improvement Meeting Agenda

Meeting Date
Friday, 4/26/2019
9:00-10:00 AM, 1400 Emeline, Conference Room 207

Meeting Identity and Mission: Inclusive, collaborative, agenda driven Continued Process Improvement meeting focused on new state and federal requirements, as well as improving client care and staff experience.

Opportunity to: Share both our voice and needs to impact policy, create and modify forms, reports and widgets

Commitment to: Bring information back to the groups we represent, gather opinion and test current projects to ensure they meet our needs

Agenda Items	Staff Area	Notes

Testing Skype Meeting: https://meet.lync.com/santacruzcountyca-co/barea/H9S2GDRS

1. Creating Pending notes report

Staff Area: All staff

- What parameters for user, Date? Staff? Supervisor? Client? Other?
- Draft and Routed? Only Routed not signed?
- Mock desired Report output
- The following is the complete list of forms staff have routed since using Avatar, April 2016

FORM ID	Form Name
CWS60001	(OLD) SC MH Treatment Plan
CWS60002	SC SUD Treatment Plan
CWS60003	SC MH Short Term Treatment Plan
CWS60004	SC MH Episodic Treatment Plan
CWSPN22001	SC Med Service Progress Note
CWSPN22002	SC General Purpose Progress Note
CWSPN22004	SC Group Progress Note
USER154	UA Drug Screen
USER177	Risk Assessment SC
USER23	Teen ASI Input
USER24	DRUG Grid
USER28	Psychosocial Assessment SC
USER29	Mental Status SC
USER31	Crisis Assessment SC
USER33	Informed Medication Consent
USER36	ASAM Reassessment SC

Purpose of the report: Reporting out items, progress notes, multiple different assessments, treatment plans and any form what was routed but not yet finalized. Or monitoring how many items were rejected/approved to show improvement.

- Line Staff can check items they've routed and are still waiting to be either approved or rejected, so they know there is nothing pending.
- Supervisors can make plans to cover for staff who are leaving, or supervisors who have left and still have pending items to review.

Parameters requested:

- **Status:** Click choice between "Final", "Pending" & "Rejected", referring to the status of the routed items
- Routing date range – **From: To:** Two dates used to filter which items to look at. Assumption is that items are routed shortly after finalizing. Since multiple types of forms are routed the routing table has when they were routed, and we would need to connect to each of the many forms currently being routed (refer to table on left)
- **Form/s:** Multiple select option of current forms, so staff can filter to only selected forms and narrow down their search if necessary. Leaving this field

blank, means all forms – not filtering the report results.

- **Router:** Search staff field representing the person who initiated the routing request. **NOTE:** Users must select only one of these last two parameters, either Router OR Approver.
- **Approver:** Search staff field representing the staff who received the routing request to approve or reject, often the Supervisor, or LPHA. **NOTE:** Users must select only one of these last two parameters, either Router OR Approver.

<u>Report output:</u>

Staff recommend a grid-like presentation to information can be transferred to a spreadsheet if desired.

Report Name: Routed Items Status

Header: Print out parameters selected

Column Headings:

- Status: Sorted with a subtotal count
- Router: Staff Name
- Form: Name of the routed form, use form labels, not forms ID
- Form Type: Name of the category this form belongs to, so staff can find the document to re-assign- if necessary to do an Approver Override.
- Client Name(Number): Show the client name and their number in parenthesis.
- Episode # : If/when listing episodic forms, show the episode number.
- Date Approved: If we're running the pending list, this column will be blank
- Date Rejected: Similarly, if we're running the approved list this column will be blank.
- Rejected comments:
- #Days since routed: Calculated as difference between Approved/Rejected and the Routed date. If item is pending,

			calculated as Date of Report (now) and date it was routed - Document Date: using date of entry or update, since depending on the document it can be date of service, or date it was finalized. (this item may not work, but we need to see what it prints out, before we decide) NOTE: Testing after the meeting revealed that routed items do not offer an option to "Review To Do Item" and be deleted from the To-Do list without actually approving/rejecting, so we don't have to worry about that scenario.
2. Client Alerts	All Staff	• Share current Client Alert analysis. • Describe Custom vs Dedicated Alert Type • Explore use case scenarios	Not discussed, re-scheduled
Next Meeting:	Friday **4/26/19** in Room 207, 1400 Emeline 2nd Floor		
Attendees:	In person: Esther Orellana, Briana Kahoano, David Chicoine, Latha Nair, Eli Chance, Lauren Fein, Bill McCabe, Emilio Rubalcava, Adriana Bare Remotely: Chris McCauley, Amber Williams, Michael Garcia, Nancy Mast, Linda Cosio		