

## 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																																		
<p>Skype Meeting Link for 4/26/19:  <a href="https://meet.lync.com/santacruzcountyca-co/barea/57MJPGFG">https://meet.lync.com/santacruzcountyca-co/barea/57MJPGFG</a></p>																																				
<p><b>1. Creating Pending notes report</b></p>	<p>All staff</p>	<p>Briefly review report request and see if we have IT questions, or requests for further detail</p> <p>What parameters for user, Date? Staff? Supervisor? Client? Other?</p> <ul style="list-style-type: none"> <li>• Draft and Routed? Only Routed not signed?</li> <li>• Mock desired Report output</li> <li>• The following is the complete list of forms staff have routed since using Avatar, April 2016</li> </ul> <table border="0"> <thead> <tr> <th style="text-align: left;">FORM ID</th> <th style="text-align: left;">Form Name</th> </tr> </thead> <tbody> <tr><td>CWS60001</td><td>(OLD) SC MH Treatment Plan</td></tr> <tr><td>CWS60002</td><td>SC SUD Treatment Plan</td></tr> <tr><td>CWS60003</td><td>SC MH Short Term Treatment Plan</td></tr> <tr><td>CWS60004</td><td>SC MH Episodic Treatment Plan</td></tr> <tr><td>CWSPN22001</td><td>SC Med Service Progress Note</td></tr> <tr><td>CWSPN22002</td><td>SC General Purpose Progress Note</td></tr> <tr><td>CWSPN22004</td><td>SC Group Progress Note</td></tr> <tr><td>USER154</td><td>UA Drug Screen</td></tr> <tr><td>USER177</td><td>Risk Assessment SC</td></tr> <tr><td>USER23</td><td>Teen ASI Input</td></tr> <tr><td>USER24</td><td>DRUG Grid</td></tr> <tr><td>USER28</td><td>Psychosocial Assessment SC</td></tr> <tr><td>USER29</td><td>Mental Status SC</td></tr> <tr><td>USER31</td><td>Crisis Assessment SC</td></tr> <tr><td>USER33</td><td>Informed Medication Consent</td></tr> <tr><td>USER36</td><td>ASAM Reassessment SC</td></tr> </tbody> </table>	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
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<p><b>2. Client Alerts</b></p>	<p>All Staff</p>	<ul style="list-style-type: none"> <li>• Share current Client Alert analysis.</li> <li>• Describe Custom vs Dedicated Alert Type</li> <li>• Explore use case scenarios</li> </ul> <p>We've had almost 1,000 client alerts in the last 7 months. 40% of those relate to needing information from the client to complete their financial profile, including needing new phone numbers and addresses. Staff who view these alerts</p>																																		

across the system, especially contractors, are not sure what they are supposed to do when they see them and they become visual noise to ignore. Adriana will work with business office supervisor to review current workflow (including targeting episodes for some information, to reduce the instances when alerts should be ignore), recommend a new one, train admin staff and create a document that can be shared with other staff, so everyone seeing an alert understands their role and next steps. In addition, Adriana will work with county staff to clean up existing, most likely no longer relevant messages, so we can start fresh.

QI studied the alert types and developed a document attached to these minutes. QI will present their recommended workflow regarding Client Alerts related to safety (threats, restraining orders, history of suicidality and/or immediate clinical instructions for clients) at our next meeting 5/3/19.

We have confirmed that one user can expire an alert entered by another, so part of the clarity needs to be what new information is needed and how to make the alert stop appearing once that is gathered.

<b>Next Meeting:</b>	Friday <b>5/3/19</b> in Room 207, 1400 Emeline 2 <sup>nd</sup> Floor
<b>Attendees:</b>	<u>In person:</u> Claire Friedman, David Chicoine, Lynn Harrison, Tiffany Kostigen Mumper, Sarah Tisdale, Briana Kahoano, Jasmine Najera, Adriana Bare, Stan Einhorn <u>Remotely:</u> Michael Garcia, Chris Mc Cauley, Nancy Mast, Linda Cosio