Avatar Process Improvement Meeting 1/3/20

Attendance

In person: David Chicoine, Adriana Bare, Cybele Lolley
Remotely: Gian Wong, Claire Friedman

Reviewed items discussed on 12/27/19 as follows.

Service Request and Distribution Log

As discussed last week, Gian and Netstmart concluded that the new form and the LIVE form cannot be merged, so changes to the form need to be incorporated into the existing form manually. Nancy is working on that. We need to take these extra steps to preserve the history of all previous logs, not burden staff in having to look into 2 different locations and to re-create all current timeliness reports we have for EQRO, as well as develop new complex SRDL linked widgets.

Nancy is also working on finalizing the training plan, including location and participants. There's a planned outage for the 1080 Emeline basement training lab end of Jan/Feb. David reports having used the training facilities at 701 (3rd floor) and having a great experience. If we use that location, the training needs to be in 1:45 sessions, due to parking limitations. Other options for training include, virtual training that can be recorded as well as attended live through MS Teams, and on site for contractors with labs.

David is compiling most likely, as well as compliance related scenarios that need to be highlighted during the training and also in the documentation. David will collaborate with Nancy to include these in training plan

Supervisor compliance report

As discussed previously the report is working well, with a noted issue regarding the "Psych Soc" column referring to the psycho-social assessment form and its requirements to use in validation, which create confusion and do not follow policy.
Last week we discussed 3 options to consider. We need to prioritize and pick one to have Gian program into the report for us to test. Today, we reviewed them and added one more.

Option A: Display each psycho-social assessment date under the corresponding episode - eliminate report validation expecting users o know the rules about which dates from which episodes are allowed to cover their services and know when/if their assessment is coming due. This option is the

simplest from the point of view of report writing and places the burden on the users and their training requirements to know how to do the right thing.

Option B: Make a distinction between 2 groups, Outpatient Episodes & Everything else (residential & crisis stab)

- For residential and crisis episodes, the report will display their own psycho-social assessment date. For these programs, each admission needs its own psycho-social assessment, following current timeliness requirements (5 days and same day - respectively)
- For outpatient episodes, the report will display the most recent outpatient psycho-social assessment date among open outpatient episodes, in all open outpatient episode lines. It will validate as compliant as long as that date is within 365 days. A valid assessment is in place unless treatment is discontinued in the episode under which the assessment was completed, or there is a clinical change that requires and update, which triggers a new annual cycle.

Option C: Change current workflow and have residential and other crisis episodes use a different assessment form, for example modify Crisis Assessment form to comply with requirements instead of using Psycho-social Assessment form. So the report will be compliant since psycho-social assessments would only be used by outpatient programs

Option D: Display the latest psycho-social assessment date performed by an outpatient episode under all outpatient episodes. Any psycho-social assessment filed under non-outpatient episodes would be excluded from this search. This assumes Telos and Telecare are not maintaining caseload, which are required for this report to run properly and also assumes we would create a program-based report with very similar display and requirements as follows:

- Parameters:
    - Program of admission
    - From & To dates: - will show episodes that were opened before then end of the period and closed after the beginning (or still open) to show all episodes valid for at least 1 day in the date range
- Report:
    - Add Closing Date column to the right of Admit date
    - Display only episodic information related to the program in the parameters. This report will not show other programs opened for any of the clients in the report, it will only be used for Program wide compliance.