Avatar Process Improvement Meeting Agenda
1/14/2021 **9:00-10:00 AM** **Microsoft TEAMS Meeting**

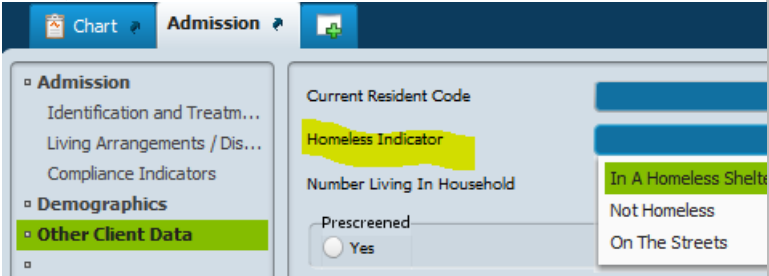|	
Meeting Identity and Mission:	Inclusive, collaborative, **agenda driven** Continued *Process Improvement* meeting focused on new state and federal requirements, as well as improving client care and staff experience.
Opportunity to:	Share both our voice and needs to impact processes & procedures, create and modify forms, reports and widgets
Commitment to:	Bring information back to the groups we represent, gather input and test current projects to ensure they meet our needs
Meeting Website	Avatar Resources / Meetings (Under Construction)

Get Involved!		• To add agenda items, contact *Melissa.McCuiston@santacruzcounty.us* • Per County Virtual Meeting Protocols - keep your camera on at all times and mute your microphone except when you are speaking

1. Introductions and meeting overview	35	1) **Introductions for new members/teams and a brief review of what the Avatar Process Improvement meeting's mission is.**
		   a. **Meeting Purpose** is to update and improve on processes, forms, reports in Avatar, in response to evolving needs of programs, as well as changes in state and federal regulations.
		     • Avatar "glitches" etc.… Should still go to IT department. For County staff: ITSupport@santacruzcounty.us; For Contractor staff: hsa.mhcompassist@santacruzcounty.us)
		     • Requests/needs around ongoing monitoring, standard monthly cleanup business, may be better handled outside of this meeting.
		   b. Welcome **Melissa McCuiston**, County BH QI department analyst, who will be helping to facilitate meeting, and managing organizational aspects of meeting.
		2) **Housekeeping items – TEAMS project area, interaction, camera use and timely completion of action items.**
		   a. Keep your camera on if possible. We want to see your face! 😊
		   b. You are encouraged to use "Gallery view" in Teams.
		   c. Meeting minutes and other documents will be on the TEAMS project area and posted on the County Avatar Webpage.
		3) **Old meeting minutes are on the County Avatar Webpage**, which is being reorganized. We will save meeting minutes in Teams, for as long as possible, but documents saved in Teams, get purged periodically. If you do not see what you are looking for in Teams, look on the Avatar webpage.
			Adriana/Melissa

		http://www.santacruzhealth.org/hsahome/hsadivisions/behavioralhealth/avatarresources.aspx
		
		4) Move to Bi-Weekly meetings (every other week)
		5) <u>NEW:</u> ==Change Form Request Template and Workflow Template==
		  a. **Forms will be on Avatar Webpage and are also in Teams Meeting files** for you to download.
		  b. **Forms are for requesting new Avatar forms, reports, etc.** to help expedite process of formulating specifications for new items and also help us prioritize projects.
		  c. TIPS:
		    • When creating your workflow, remember that steps that might come as second nature to you, may not be as clear to other people. Think about a new employee… Would they be able to figure out what to do, when looking at the workflow?
		    • Try not to use people's names in the workflow, but instead use a position or role, if you can.
		    • Your goal is to provide information to people who might not understand what your workflow is.
		    • Forms are not required, but please do put together something to provide to the committee. If there is another workflow design, or another way to describe what you need, please feel free to do so. Please also reach out to Melissa or Nancy if you need help.	

2. Initiatives for 2021	15	**1) Carry Overs from 2020**
		  a. **Consent Tracking, ROI Tracking & Potential Widget**
		    • We will cover this new form, Consent Tracking, at the next meeting. This form generates releases and provides a convenient way to view them quickly. Possibly, a widget will also be created to go with the form, which we will also discuss.
		    • Please review the form in UAT. Link to UAT: https://santacruzuat.netsmartcloud.com//radplus/index.jsp
		    • For a UAT password reset - County staff request a password reset at ITSupport@santacruzcounty.us. Contractor staff contact hsa.mhcompassist@santacruzcounty.us)
		    • Remember that supervisors and some admin staff can also reset passwords, by using the form Quick User Update. Instructions on how to use this form are posted in the Teams files and are also available on the Avatar Webpage in the Avatar Supervisor Guide, page 4. http://www.santacruzhealth.org/Portals/7/Pdfs/Avatar/Avatar%20Supervisor%20Guide.pdf
		
		  b. **Hospital Alerts (For medical hospitalizations and ED visits)**
		    • Priority Item
		    • New Widget and To-Do items - System sends a message to a user's My To Do's when a client on their caseload visits the ED at Watsonville Hospital or Dominican Hospital, OR is admitted to inpatient at either of these locations. Connects to the Santa Cruz HIO (formerly HIE) which is the county
			Nancy
			
			Dave/Adriana
			Adriana
			Adriana
			Cybele
			All

<table>
<tr><td></td><td></td><td>data repository for health clinics and hospitals (not psych hospitals). System is in final testing and will be implemented soon.
c. Updates since committee last met include updating Service Request and Disposition Log, SRADL reporting and new Supervisor Compliance Reports.
2) New Initiatives for 2021
    a. **Homeless Indicator Data Cleanup** - Tracking homeless data is important. There is a question that asks about homelessness in the Admission form that should be answered consistently. The remedy is twofold, 1) put processes and procedures in place to ensure question is being consistently answered and, 2) develop plan to capture historical data in other ways from Avatar System.

    b. Suggestions for 2021 items</td><td></td></tr>
<tr><td>3. Action Items</td><td>5</td><td>**Please review the Consent Tracking form in UAT.**
• Link to UAT: https://santacruzuat.netsmartcloud.com//radplus/index.jsp
• For a UAT password reset - County staff request a password reset at ITSupport@santacruzcounty.us. Contractor staff contact hsa.mhcompassist@santacruzcounty.us)
• Remember that supervisors and some admin staff can also reset passwords, by using the form Quick User Update. Instructions on how to use this form are posted in the Teams files and are also available on the Avatar Webpage in the Avatar Supervisor Guide, page 4. http://www.santacruzhealth.org/Portals/7/Pdfs/Avatar/Avatar%20Supervisor%20Guide.pdf</td><td>All</td></tr>
<tr><td>4. Parking Lot</td><td></td><td></td><td>All</td></tr>
<tr><td>**Next Meeting:**</td><td colspan="3">**January 28, 2021 9:00 am**

Meeting schedule is every other week, Thursday mornings, at 9 AM.</td></tr>
<tr><td>**Attendees:**</td><td colspan="3">Adriana Bare, Amber Williams, Barbara Lehman, Casey Swank, Chris McCauley, Claire Friedman, Cybele Lolley, Dagny Blaskovich, Dave Chicoine, Gian Wong, Judy Miramontes, Karen Kern, Kristen Claassen, Linda Cosio, Lisa Gutierrez-Wang, Maya Jarrow, Melissa McCuiston, Nancy Mast, Robert Annon, Stacey Otlin</td></tr>
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