

Avatar Process Improvement Meeting Agenda

1/28/2021

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

Agenda Items	Allocated Time	Comments	Staff
1. Introductions and meeting overview	15	1) Old Project Listing: We went through the Project listing. Melissa will update with the changes and post in the TEAMS area and will also distribute with the meeting minutes.	Melissa All
2. Initiatives for 2021	35	<ul style="list-style-type: none"> • ED Alerts – Info Notice is in progress. Nancy to include wording about Caseload assignments and encourage caseload cleanup. Robert Annon pointed out that the caseload report is used in supervision so caseloads should be easy to cleanup/maintain. There was some discussion about how to interact with the clients once an alert has been received. • Consent Tracking, ROI Tracking & Potential Widget – Test form is in UAT> Adriana shared a look at the form and talked about its intention which is to provide a widget that allows staff to quickly see ROI's on file and to receive reminders about expired forms. There were some permission issues – not everyone could see the form. Gian and Nancy resolved during the meeting. Should anyone not have access to the form, please let Nancy or Melissa know right away. It was discussed that the data dictionary for which forms should be included needs to be customized for Santa Cruz. It was also requested that Staff names auto-populate to save time. Adriana requested that QI provide a list of approved forms that can be included. • Homeless Indicator Data Cleanup – Change Request Form needed: Ran out of time. It was requested to move this to next Agenda. Adriana asked Gian to please provide a report for next meeting that indicates how many clients we have that have the 	Adriana/Gian Adriana Adriana

		indicator selected – either off or on. We need someone to fill out the request form for this project so that it can be logged in the database.	
3. Action Items	5	<ul style="list-style-type: none"> • Nancy to finish Info Notice about ED Alerts • Everyone -test your login to UAT and take a look at the form: Legal Tracking for discussion next meeting. • QI to provide a list of approved Forms for the dictionary • Gian to work on the Legal Tracking form (Auto Date entry for 1 year, auto-population of staff names and data dictionary once received) • Gian to provide Homeless indicator report for next meeting • Melissa to update request listing • Melissa to reach out to Karen about CANSA items on the project listing • Melissa to reach out to Adriana about filling out CM request form for Homeless Indicator project 	
4. Parking Lot			
Next Meeting:	February 11, 2021 9:00 am		
Attendees:			