DHHS Mental Health – Avatar Implementation User Forum

Minutes

Date: 7/24/08
Time: 1:30 – 3:00 PM
Location: 7001 East Parkway, Sacramento, Conference room 1

Facilitator: Tracy Herbert

Scribe: John Sawyer

Attendees: (See sign in sheet)

Time	Agenda topic	Presenter
10	**Welcome / Introductions** In addition to the Sacramento County core team members: • Tracy Herbert – Project Sponsor • Kacey Vencill – Business Analyst • John Sawyer – IT Analyst • Len Gray – Project Manager The first user forum was very well attended by both Sacramento County and Contracted Providers. Those in attendance included executive directors, IT personnel, managers, data entry staff and line staff. This is exactly the broad representation we had hoped for. Thanks for your support. The purpose of the user forums is to provide the opportunity for face-to-face interactions, questions, user input, quick demos, and updates on implementation progress. The user forums are NOT intended to take the place of user training, which is currently scheduled for January 2009.	Tracy Herbert
20	**Quick Avatar PM Demo – Opening an Episode** A brief demonstration was provided. It included the opening of an episode (currently known as admitting to a cost center), entering demographic information for a client as well as how to record a service/treatment. In addition, user preferences were demonstrated. These settings allow the user to specify basic preferences about how AVATAR will function for them. Including what they would like to see upon logging into AVATAR, what application should be used for spell checking functionality, etc. AVATAR also has the ability to create "Favorites" and this was demonstrated as well. This functions in a similar manner to 'Favorites' that are used for book marking websites. It allows for users to create shortcuts to go directly to the option that they need to use, bypassing the full menu structure. An 'option' is an AVATAR specific term that refers to a screen or report within the AVATAR application.	Kacey Vencill

10	**High Level Timeline Review / Deliverables** A high level milestone graphic was presented. The AVATAR implementation is currently on schedule with an implementation date of February 1, 2009. An electronic copy of this document is available at https://www.sacdhhs.com/CMS/download/pdfs/MBR/Visio-CATS_MSO%20Milestone%20timeline_07162008.pdf	Len Gray
10	**Known business practice changes** Known changes were presented to the forum attendees including: - Authorizations will be entered in the AVATAR PM component of the application and the MSO component will not be used at go-live. - Consolidation of various code and identifiers.-This includes the consolidation of cost centers (programs) where possible. Specific details will be communicated after the conversion activities are completed. - A simplified zip slip for service entry – While the document itself has not been released, the new system will collect data upon admission and discharge that previously were collected for every service. This will reduce the number of items on the zip slip. Additional changes will be communicated as soon as they are available.	Tracy Herbert
30	**Provider Involvement Review** An overview of Provider involvement was discussed. Specifically, the following items: • Sites and Users Sacramento County has been collecting information for site liaisons for the AVATAR implementation project. Site Liaisons will be the point of contact for project communication and will relay information/questions between the users at their respective sites and the Avatar team. They will also play a valuable role in collecting information needed for go-live such as users and their role assignments. A list of site liaisons can be found at https://www.sacdhhs.com/CMS/download/pdfs/MBR/AvatarProviders080708.pdf • RADplus input (custom screen designs) Avatar allows for some customization of screen layouts and data elements. The next phase of the project will be to identify screens that do not currently capture all elements necessary for Sacramento County. Feedback and input will be solicited from service providers to ensure all critical business can be completed. • Report input After the RADplus development phase (see bullet above) the next phase of the project will be to make sure that all critical data that is necessary to be reported is available from AVATAR. While AVATAR does come with many "canned" reports out of the box, we have the ability to customize some of these reports for our business. If it is determined that a required report does not exist, we will be building these reports before go-live. This process will also include soliciting information from service providers to ensure that all critical business needs are met. • Security role assignment The AVATAR product has two levels of security. Security levels 1-4 are similar to the security levels used in CATS. However, in addition to these levels of access we also have the ability to create security roles. These user roles will be attached to user ids. This will make the maintenance of these logon accounts easier to manage. Site liaisons will be an integral part of this activity. Security roles and their descriptions will be provided as soon as this information is available. • Training (curriculum review and course sign up for all staff)	Tracy Herbert

Training will likely be multi-day and coordinated by the liaisons identified for each provider. Training is slated to be conducted during the month of January. A 'sandbox' environment will be available ahead of go-live to allow users a chance to become familiar with Avatar

- Installation of Avatar
  Installation will be handled by the application itself when you connect to the Netsmart website. Installation will require that the user have administrative rights on the PC, at least for the first launch, because it involves the downloading of Java runtime and RADplus files. Documentation will be provided ahead of time as to the steps to follow for install for different operating systems.

- Support Model review
  The support model is still in development at this time and will be communicated to the user community as we get closer to the Go-Live transition period. It will include steps to follow when an issue is experienced to make sure that a resolution can be obtained in the most efficient manner.

- Data clean up
  As part of any data conversion effort, there is the need to clean up data in order for it to 'fit' the parameters of the new system. Sacramento County has decided to convert 10 years of service and episode data to ensure that clinically relevant information is not lost during the implementation of the new system. All data recorded in CATS will be archived prior to sun setting the CATS application permanently. Although, Sacramento County does not wish to burden providers with the task of data cleanup, there may be some unique circumstances where Provider assistance is necessary. It is the goal of the Mental Health Division to avoid this if possible.

- Go-Live set up
  Just prior to go-live of AVATAR, there will be specific data that will need to be collected. The AVATAR project team will work with the site liaisons to gather this information. This will include data such as users and security roles as well as scheduling information.

  There will be some period of time where data entry will be unavailable during the Go-live transition period. A cutover plan will be provided that describes when data entry in CATS will need to cease as well as when data entry into AVATAR can begin. There is no plan at this time to have providers enter services into two systems. .

- Go-Live support
  A varied support model will be used for a short period of time after the Go-live event. This will be in place in anticipation of a higher than normal user "problem" volume, and to minimize the turn around time needed to resolve the same.

10	Questions and Answers	All

The following questions and answers were provided at the User Forum:

Q. **What are the minimum requirements needed for Avatar?**
A.   Processor: Intel Pentium 500 MHz or greater
        RAM: 512MB
        Hard disc space: 512MB
        Monitor: VGA or higher (1024x768)
        Mouse: Microsoft Mouse or compatible pointing device

Q.   **What operating systems and browsers are supported?**
A.   OS: Windows 2000 or greater
        Browser: Internet Explorer 6.0 or better
        ** Other browsers such as Firefox may function, but may require manual

installation of the java applets.

Q. **Does AVATAR have a spell check function?**
A. Yes

Q. **Will training be multi-day?**
A. Likely, yes. The training calendar will be available during the last quarter of 2008.

Q. **Will there be the opportunity to install the application ahead of time?**
A. Yes the application will be available in plenty of time to ensure that everyone is ready for the go-live event. Sacramento County will provide support to assist with this activity.

Q. **Will there be a "sandbox" environment made available?**
A. Yes. A link to the sandbox and logon instructions will be communicated as soon as the information is available.

Q. **How is installation handled?**
A. Installation will be handled by the application itself when you connect to the Netsmart website. Installation will require that the user have administrative rights on the machine at least for the first launch because it involves downloading and running some Java applets. Documentation will be provided ahead of time as to the steps to follow for install for different operating systems.

Q. **Are there shortcut keys for users who prefer keyboard rather than mouse controls?**
A. Yes. And since the meeting the list of shortcut keys has been posted to the website at https://www.sacdhhs.com/CMS/download/pdfs/MBR/AvatarKeyboardShortcuts.pdf

Q. **If a user sees 4 screens in CATS, will they see the same 4 screens in Avatar?**
A. Not necessarily. If a user can see 4 screens in CATS, then they will have access to the equivalent information in Avatar, but the number of screens (options) may vary.

Q. **Will there be concurrent data entry at cutover or will there be a lapse in data entry for a period of time?**
A. As currently envisioned, there will not be duplicate data entry. More details about when to cease data entry in CATS will be communicated as soon as the information is available. There will be specific users that will need to maintain their access to CATS but this is the exception and the plan is for those users to be limited to DHHS Fiscal and Quality Management. However, more information will be communicated as soon as it is available.

Q. **Will there be a method to view client information with other Cost Centers?**
A. Sacramento County Mental Health understands the need to view information for purposes of coordination of care. At this point, it is not known whether that information will come in the way of a 'view only' password as is currently done in CATS or if it will be by way of a report that can be generated to see all of the places where a client is receiving services. There will be a way however, to provide information for coordination of care.

Q. **What is the responsibility of the Liaison which we recently were asked to identify?**
A. These will be the primary contacts for each location. These individuals will be the ones who:
  • Identify the users and their roles prior to implementation
  • Relay feedback on questions and answers back to their groups
  • Gather and forward any questions to the Avatar implementation group
  • Assist with ensuring that all users are scheduled for training
 	
Q. **Can we still search on DOB/SSN?**
A. Yes
 	
Q. **Will Avatar confirm Medi-Cal eligibility?**
A. Yes, Via the MMEF (Monthly Medi-cal Eligibility File).
 	
Q. **Will Avatar be able to conduct <u>real time</u> eligibility verification?**
A. AVATAR is currently able to submit a 270 (eligibility inquiry) transaction and receive a 271 (inquiry response). It is the plan to have this transaction available for use at go-live.
 	
Q. **Regarding Client Merges. When you merge client records, will you inform the program of the merge so that they can correct their records for now defunct Client Ids?**
A. We will work out a process that includes providing information related to client records that have been merged as a result of the conversion effort. More information will be communicated as soon as it is available.	

11 **Next User Forum :** 8/26/08, 12:30 – 2:00, 7001 East Parkway, Conf rm 1	