

Minutes



DHHS Mental Health – Avatar Implementation User Forum

Date: 8/26/08

Time: 12:30 – 2:00 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	<p>Welcome / Introductions</p> <p>In addition to the Sacramento County core team members:</p> <ul style="list-style-type: none">• Tracy Herbert – Project Sponsor• Kacey Vencill – Business Analyst• John Sawyer – IT Analyst• Len Gray – Project Manager <p>The second user forum was very well attended by both Sacramento County and Contracted Providers. Thanks for your continued support and participation.</p>	Tracy Herbert
20	<p>Communication Feedback</p> <ol style="list-style-type: none">1. Avatar Project Website: https://www.sacdhrs.com/default.asp?WOID=MBR <p>Walk through of the website, which is a work in progress, but is available to all interested parties was provided. It is also linked on the Mental Health homepage. Contents of the page include the following, which were discussed individually:</p> <ul style="list-style-type: none">• Email link to the Avatar team• Timeline link with the most recent copy of the timeline document• Minutes from User Forums• FAQ- which at this point contains all questions submitted to the Avatar team to date.• Keyboard shortcuts which function in Avatar• Link to the vendor Netsmart's website• Provider List with identified liaisons <ol style="list-style-type: none">2. Q & A review Went through the questions asked at the August User Forum in detail (which comprises the FAQ link on the website.)3. Avatar Mailbox Linked on the website, or accessible at Avatar@Saccounty.net. This mailbox is monitored by all of the Avatar team members, and we try to respond promptly to any questions received. We encourage all providers to submit questions and concerns to the mailbox.	Kacey Vencill

	<p>4. Other... All previously identified Provider Liaisons should have received communication at this point from the Avatar group with links to the website and minutes. Anyone who has not received communication or who wished to be added to the distribution list can communicate directly to Avatar@Saccounty.net .</p>	
30	<p>Avatar Demo</p> <p>1. Client Configuration Manager review and input Original search parameters included:</p> <ul style="list-style-type: none"> • Last Name • First Name • Date of Birth • Social Security Number <p>Recently, additional search items were added:</p> <ul style="list-style-type: none"> • Client ID • Alias <p>On the search results, a scored list is returned. A sample of the search screen can be found in the “Sample Screenshots” section on the website.</p> <p>At future User Forums we will be discussing the possible need to add additional search criteria and/or results fields, and if necessary modifications to the weighting of search values.</p> <p>2. Eligibility</p> <ul style="list-style-type: none"> • MMEF Data and reports Medi-Cal search function: Returns up to 24 months of historical Medi-Cal eligibility information. A sample of the information displayed can be seen in the “Sample Screenshots” link on the website. This function is historical only, and does not serve as a substitute for using MEDS or other “live” eligibility verification. The data contained in the MMEF file is for Sacramento County clients ONLY • 270 / 271 discussion The process to verify Medi-Cal eligibility via a 270 submission is currently not in production, but it should be prior to go-live. Unlike the MMEF data, this information is current, and can be obtained for non Sacramento County clients. <ul style="list-style-type: none"> ○ 270 is a reference to a HIPAA compliant request submitted to the state to obtain eligibility information ○ 271 is a reference to a HIPAA compliant response received from the state containing eligibility information • Walk through of process for entering a new client from data entry through client charge input. <ul style="list-style-type: none"> ○ New Client Input <ul style="list-style-type: none"> ▪ Occurs with the entry of the client into an episode only. ▪ Red field names indicate required fields. ▪ See “Sample Screenshots” on the website ○ Fast Financial Eligibility (or Financial Eligibility if additional information is required) <ul style="list-style-type: none"> ▪ Guarantor = Payor ▪ Policy = CIN ○ Authorization (was skipped for the purposes of this meeting) ○ Client Charge Input <ul style="list-style-type: none"> ▪ Without an authorization, can still enter services on a client ▪ The “Display Managed Care Authorizations” button will inform users if there are no authorizations present. ▪ See “Sample Screenshots” on the website 	Kacey Vencill

5	<p>Suggestions for future User Forums</p> <ul style="list-style-type: none"> • 270/271 Processing demonstration • Additional billing demonstration- entering services • Authorization demonstration • Program admission demonstration • What reports will be available 	Users
10	<p>Next month's project activities in review</p> <ol style="list-style-type: none"> 1. Sites and Users (Security Roles) The Avatar group will be working on defining Avatar roles and will be bringing back an assignment at the September Users Forum for the Liaisons. At that time, we will be giving out the role definitions and asking each provider to determine how many members of each role will be in place in their location. At this point, we are looking only at gathering numbers, and we will look at getting specific names closer to go-live. 2. RADPlus Modeling We have been and will continue to look at the business processes involved in all areas of the program to determine those which may require modifications to existing or new screens (i.e. modeling) in order to gather information necessary to function. 3. Reporting Hand in hand with modeling, we will be identifying reporting needs for all areas, determining what is already available, and if it is not already present determining whether the reports require additional modeling to gather the information upon which they are built. 4. Test Conversion We plan to complete a trial conversion of data from CATS into Avatar and will share feedback at the September Users Forum. 	Tracy Herbert
15	<p>Open Forum</p> <p>The following questions and answers were provided at the User Forum:</p> <p>Q. Can we still search by MSO number? A. No. there will be no MSO at go-live. All of the functions currently handled in MSO will be processed in Avatar PM.</p> <p>Q. Can we see family group numbers in the search results when searching for a client? A. Yes. Although family group is currently not set up as one of the search criteria, it does display in the search result matrix.</p> <p>Q. Can CIN be used as a search parameter? A. It is possible to set up any field to be used as search criteria, however CIN is currently not one of them. That is something that we will consider.</p> <p>Q. Can we use wildcard searches? A. There are not the equivalents of what would be called "wildcards" in Avatar, but you can search on partial names (like BAK for BAKER) and by soundex score.</p>	All

- Q. **Can we get a sample of the search screen?**
A. There is a link on the Avatar website called "Sample Screenshots" that includes sample of many of the commonly used screens, including the search results.
- Q. **Will we still experience problems with multiple providers creating problems for each other on shared clients with payor strings?**
A. No. Each provider will have control of their own payor information.
- Q. **Will the Eligibility (MMEF) search replace the need for us to use MEDS or other verification processes?**
A. No. The MMEF file contains historical data only. The 270/271 process however, should when implemented provide this functionality.
- Q. **What are 270 and 271?**
A. They are references to HIPAA compliant requests (270) and responses (271) from the state containing client eligibility information.
- Q. **Will we still have to verify Medi-Cal eligibility monthly?**
A. Yes, but this can be done from within Avatar using the 270/271 process. At this point as this function is not in production, we do not know exactly how it will be completed. We hope to go over this and all other detailed eligibility/authorization processes in detail at the September 25th Forum.
- Q. **Can we attach progress notes to Avatar cases?**
A. No. This not part of the scope of the project currently, which is to replace the billing functionality of CATS. That is something that may be added in the future.
- Q. **Are there any functions present in MSO that will not be available in Avatar?**
A. There are 2 primary functions in MSO that are not incorporated into Avatar PM.
 - Built-in generation of authorization numbers: We have already created a method of auto generating these numbers which will serve the same purpose, but which will be handled outside of Avatar.
 - The ability to receive electronic claims from providers, which is not currently in use.
- Q. **In regards to authorizations containing "maximum units of services", if a provider goes over the authorized amount, will the system disallow further claiming?**
A. No. Not only can providers enter claims in excess of authorized hours, but they can also enter claims for services not authorized or on expired authorizations. Avatar just has the functionality of allowing Mental Health to generate reports on services billed in excess of authorized hours, or claims billed for non-authorized services.
- Q. **Will we be able to get reports in formats other than print?**
A. Yes. The built in reports have multiple export options such as Excel, text, Word, and Adobe.