

# Minutes



## DHHS Mental Health – Avatar Implementation User Forum

**Date:** 10/23/08

**Time:** 1:30 – 3:00 PM

**Location:** 7001 East Parkway, Sacramento, Conference room 1

**Facilitator:** Kacey Vencill

**Scribe:** John Sawyer

**Attendees:** (See sign in sheet)

Time	Agenda topic	Presenter
5	<p>Welcome / Introductions</p> <p>In addition to the Sacramento County core team members:</p> <ul style="list-style-type: none"><li>• Tracy Herbert – Project Sponsor</li><li>• Kacey Vencill – Business Analyst</li><li>• John Sawyer – IT Analyst</li><li>• Len Gray – Project Manager</li></ul> <p>The fourth user forum was very well attended by both Sacramento County and Contracted Providers. Thanks for your continued support and participation.</p>	Tracy Herbert
10	<p>Review security role status</p> <ol style="list-style-type: none"><li>1. A spreadsheet explaining the security roles in Avatar was discussed and can be found on the Project Website under the “Security Implementation” section at the following link: <a href="https://www.sacdhhs.com/default.asp?WOID=MBR">https://www.sacdhhs.com/default.asp?WOID=MBR</a></li><li>2. The avatar team is gathering numbers (not names at this time) of users by role for each site. Each provider present was provided a security role sheet which included:<ul style="list-style-type: none"><li>• Inquiry (Read only access to Avatar)</li><li>• Data Entry (<b>Includes Inquiry ability</b>)</li><li>• Authorization (Select County sites only)</li></ul></li><li>3. As of the date of this Forum, we have received feedback from all but 5 locations. A current list can be found on the website at the link “Role Counts by Provider”.</li><li>4. A summary of user licenses for the Avatar application was provided.<ul style="list-style-type: none"><li>• There are currently around 350 CATS/MSO users</li><li>• Sacramento County Mental Health has contracted for 500 Avatar licenses, which included a perceived buffer of licenses to apply to an expanded usage of the application</li><li>• As of this forum, 650 licenses have been requested.</li><li>• All site coordinators must revisit the volume of licenses requested in order to bring the total count down to &lt; / = 500.</li><li>• Sacramento County will need to make adjustments to the number of licenses provided to each entity, should the revised total amount requested not meet the described goal by 11/7/08.</li></ul></li><li>5. Some points of clarification / discussion regarding the high number of user licenses requested count was ensued. The following provides a recap:</li></ol>	John Sawyer

	<ul style="list-style-type: none"> <li>• Each Avatar user should only be represented in the counts 1 time. If they work at multiple sites periodically, they only need one license.</li> <li>• A user with the “Data Entry” role can make inquiries as well. Therefore, they <u>should not</u> be counted as needing an “Inquiry” role too.</li> <li>• All site contacts were requested to review their user role count submissions to ensure the above clarifications are taken into consideration.</li> <li>• If you have questions on this, please seek feedback from <a href="mailto:Avatar@Saccounty.net">Avatar@Saccounty.net</a>.</li> </ul>	
40	<p><b>Avatar Demo</b></p> <ol style="list-style-type: none"> <li>1. Group Services Screen:       <ol style="list-style-type: none"> <li>a. Identical to individual services for the most part           <ul style="list-style-type: none"> <li>○ Open up Client Charge Input</li> <li>○ Choose an appropriate Group Service Code</li> <li>○ You will be prompted to enter the number of clients in the group. Avatar then uses that to do all the behind the scenes calculations.               <ul style="list-style-type: none"> <li>• As with all screens in Avatar, required items show in red.</li> <li>• Some items (such as Duration) become “required” based on entry of other items.</li> </ul> </li> </ul> </li> </ol> </li> <li>2. Reports (<b>see sample of each at the end of this document</b>):       <ol style="list-style-type: none"> <li>a. UMDAP Expiration           <ul style="list-style-type: none"> <li>○ Unlike the current process, UMDAP in Avatar is correctly associated with the family unit, not with each individual client.</li> <li>○ This report uses security based on the Legal Entity of the user. The example given was that a Visions user would see UMDAPs expiring for all families which contain at least one member who is currently active in any Visions program.</li> </ul> </li> <li>b. Diagnosis and Movement History (CATS I-1 without the Treatment History)           <ul style="list-style-type: none"> <li>○ This report includes no security component. Any Avatar user can run this report for any client and view all of the Diagnosis and Movement history information included.</li> <li>○ As requested, we will add the SSN and the Family Group ID (if there is one).</li> </ul> </li> <li>c. Client Services           <ul style="list-style-type: none"> <li>○ This is in effect the Treatment History.</li> <li>○ Does include Legal Entity level security.</li> <li>○ As requested, we will create a duplicate version of this report which does not include the Cost column and that will be made available based on security settings.</li> </ul> </li> <li>d. Services Without Authorizations           <ul style="list-style-type: none"> <li>○ Uses Legal Entity level security</li> <li>○ For the date range selected, it will return all services entered which meet any one of the following conditions:               <ul style="list-style-type: none"> <li>• There is no authorization at all matching the service date.</li> <li>• There is an authorization for the service date, but the billed service was not included in the authorization.</li> <li>• There is a valid authorization, for valid service codes, but the total units entered exceed the amount authorized (if a limit was set).</li> </ul> </li> </ul> </li> <li>e. New Authorizations           <ul style="list-style-type: none"> <li>○ Uses Legal Entity level security.</li> <li>○ Designed to allow programs to display all authorizations to their programs within a date range of their choosing based on their internal business needs.</li> </ul> </li> </ol> </li> </ol>	Kacey Vencill
10	<p><b>User Acceptance Testing (UAT)</b></p> <p>We are currently scheduled to begin UAT the week of November 17<sup>th</sup>. The team has many timelines to be met prior to that which may force us to look at moving that back a few days, but we are still hopeful of meeting the target date.</p>	Tracy Herbert

	<ul style="list-style-type: none"> <li>• UAT will be represented by all facets of user types and business functionality, currently performed in CATS/MSO.</li> <li>• The UAT testers will comprise a mix of Access, Contracted and County Provider and Fiscal/Billing users.</li> <li>• At this time, we are asking that any providers who have an interest in participating contact us as soon as possible at <a href="mailto:Avatar@Saccounty.net">Avatar@Saccounty.net</a> . Due to time and space limitations, we are only looking for 1 tester from each interested provider at this time. This does not mean that 1 will be chosen for each provider for UAT.</li> <li>• UAT is scheduled to last 5 days, but each participant's role is expected to last between 1 and 2 days based on the testing they will be doing.</li> </ul>	
10	<p><b>Option Bundling</b></p> <p>At the last User Forum, we requested suggestions on screens which users would like to see bundled. Several people submitted some suggestions to the Avatar email, all of which were looked at. Unfortunately, for a variety of reasons, none of them could be fully implemented as requested.</p> <ul style="list-style-type: none"> <li>• Although there is no technical limit to the number of screens which can be bundled, in practical terms, more than 4-6 are not viable due to the load time associated with each screen opening as well as the screen tab names becoming too small to read.</li> <li>• Avatar screens in a bundle must all be part of the same "Entity". In other words, bundled screens must be related to each other along specific categories, which include: Client Screens, Provider Screens, Practitioner Screens, User Screens.</li> </ul> <p>We are still open to the creation of bundles; we are just more limited in their creation that we originally thought due to these database structural rules. If you have any questions or suggestions please continue to submit them, and thank you to those users who have already given feedback.</p>	Kacey Vencill
5	<p><b>Suggestions for future User Forums</b></p> <ul style="list-style-type: none"> <li>• 270/271 Processing demonstration- The 270/271 process is being implemented in Avatar in 2 sections. The actual program side of the implementation is complete, but Netsmart is still working with the State on the communication portion, so it is not ready for demonstration at this time. It is expected to be available at go-live, and we will be looking to demonstrate it at a forum as soon as it is available.</li> <li>• Demo of the Scheduling Option</li> </ul>	Users
5	<p><b>Next month's project activities in review</b></p> <ol style="list-style-type: none"> <li>1. Sites and Users (Security Roles) Thank you for all of the feedback on user roles to date. We need to look now at the accuracy of the information as well as possibly revision of the roles based on license concerns. As we get closer to training, we will be following up to gather names of users by site/role.</li> <li>2. Bundling We would still like to receive feedback from providers as to which screens would be nice to have as available bundles. See the notes above on Option Bundling for some of the limitations on this.</li> <li>3. 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.</li> <li>4. Reporting 5 of the reports which have been customized for Sacramento to use within Avatar</li> </ol>	Kacey Vencill

	<p>were demonstrated during this forum. We have several others already completed, and many more which will be completed and available prior to User Acceptance Testing. We will also be making changes to those demonstrated based on user feedback today, and any other feedback we receive via email.</p> <p>5. User Acceptance Testing Currently scheduled to begin the week of November 17<sup>th</sup>. See the notes above regarding requests for participation.</p>	
10	<p><b>Open Forum</b></p> <p>The following questions and answers were provided at the User Forum:</p> <p><b>Q. Given the changes in process regarding the authorization to programs, will programs still be required to submit census reports to the Access Team? How will slot management be handled?</b></p> <p>A. To be detailed in a policy that will be developed.</p> <p><b>Q. How will the change in the authorization process affect calculation of the date of the first face-to-face visit?</b></p> <p>A. We understand that due to the change in the authorization process, the “admission date” is no longer viable to use as the starting point for several calculated timeframes for which the providers are responsible. The team will have to explore some possible options for this, whether tracking it from a service date, or via a field exclusively used for this purpose. Once we have what we feel is a viable solution, we will present it back to the User Forum for feedback.</p> <p><b>Q. When entering group services, if the group is providing services to clients in more than one cost center, how will that be entered?</b></p> <p>A. This will be done effectively the same way that it currently is done in CATS. Services will be entered into each program based on the number of clients who received services during the group.</p> <p><b>Q. Given the changes in UMDAP (it will be family based rather than client based). When creating a new family, are providers expected to enter all family members, or just their clients?</b></p> <p>A. Providers will be expected to enter the family members for which they are providing services. Details about UMDAP changes are forthcoming.</p> <p><b>Q. If family members are added at different times, how is the UMDAP start date affected?</b></p> <p>A. The UMDAP start date is based on the start date established for the first member to join the family.</p> <p><b>Q. Who is responsible for updating UMDAP information for families which include clients open in more than one program?</b></p> <p>A. There is an expectation that any provider who becomes aware of a change in the UMDAP status for one of their clients services will update Avatar. Details about UMDAP changes are forthcoming.</p> <p><b>Q. Does Avatar prevent a program from entering a client charge for a service which would put them over the limit of authorized units?</b></p> <p>A. By design, there is no limitation from entering services in that situation. However, from the Client Charge Input screen, as a user enters a service they can click the “Display Managed Care Authorizations” button and it will</p>	All

pop up a window warning them if the service they are entering does not fall within the bounds of the current authorization.

**Q. If a user is tabbing between fields in Avatar, does the cursor only stop in the red “required” fields?**

A. Tabbing moves through all fields, whether or not they are required.

**Q. Is there a plan to implement Electronic Medical Records within Mental Health, and if so, will it be a part of or communicate with Avatar?**

A. There is no plan to look at this prior to Avatar go-live. It is, however, a requirement for MHSA that counties have a plan on how to eventually get to an EMR. After Avatar go-live, Mental Health will be starting planning for the MHSA IT funds, which will include planning for EMR implementation. Although at this time we do not know who would be the vendor of an EMR system, Netsmart (the Avatar vendor) does have a product which would integrate with Avatar PM and which is designed to meet EMR guidelines.

**Q. How will the scheduler handle the differences between programs? Can a Provider use the scheduler for one component of their program and not others (eg, Outpatient but not FOCUS programs)?**

A. We will be looking at the different possibilities of the scheduler prior to the demonstration at next months User Forum. Any specific questions about it should be sent to the [Avatar@Saccounty.net](mailto:Avatar@Saccounty.net) email so we can check out different possibilities prior to then.

**Q. Given the more detail now available in reporting on services provided over the amount of authorized units, will providers be expected to delete services which exceed the authorization?**

A. The policy on how to deal with these situations must be developed.

**Q. If an authorization is expiring, or if an authorization has gone several months prior to the client even being seen, what can providers do?**

A. Details about authorizations will be included in the policy from Mental Health Management..

**Q. Historically, the UMDAP start date has always been the first day of the month, but it looks like Avatar allows other days during the month. Is this a change?**

A. We need to look at why the first of the month was implemented currently and determine if that is a requirement that should be carried over into Avatar. Will be addressed in the UMDAP policy as needed.

**Q. Regarding the UMDAP report, it would be nice to have the payor (guarantor in Avatar) information available.**

A. Because the UMDAP process is family based, and the guarantor information is client and episode based, it would be difficult to incorporate it accurately into the UMDAP. We can look at other reporting options to assist with management of guarantor changes.

**Q. Will the mothers still be the link for UMDAP?**

A. Will be included in the UMDAP policy.



## Sacramento County DHHS - Division of Mental Health

### UMDAP Expiration Report

Sacramento County DHHS - Division of Mental Health [UMDAP Expiration]

Family Name /Group #	Members	UMDAP Start Date	UMDAP Expiration
<b>BAKER 001</b>	<b>5</b> BAKER,BILL(1)	5/4/08	5/3/09
<b>Craig</b>	<b>6</b> CRAIG,JENNY J(22)	5/5/08	5/4/09
<b>DOE</b>	<b>29</b> DOE,JOHN(29)	1/1/08	12/31/08
<b>Forum</b>	<b>19</b> FORUM,USER(109)	9/25/06	9/24/07
<b>HOWSER 001</b>	<b>11</b> COOKIEDOUGH,JANE(5) HOWSER,DOOGIE(6)	5/5/08	5/4/09
<b>MACKEY</b>	<b>18</b> CLIENT,INPATIENT(106)	9/16/08	9/15/09
<b>QUICK</b>	<b>7</b> QUICK,JOHNNY B(13)	5/5/08	5/4/09
<b>VENCIL, KACEY</b>	<b>17</b> VENCIL,KACEY(84)	5/1/08	4/30/09
<b>ZEN</b>	<b>13</b> ZEN,MARY(18)	5/5/08	5/4/09



# Sacramento County DHHS - Division of Mental Health

## Diagnosis and Movement History

### Sacramento County DHHS - Division of Mental Health [Diagnosis and Movement History]

Client ID:	<b>1</b>	Client Name:	<b>BAKER,BILL</b>
Gender:	Male	Home Phone:	916-555-1212
Date of Birth:	5/1/1985	Alias:	William (The Hatchet) Baker
Primary Language:	American Sign Language		
Ethnic Background:	Asian Indian & Cambodian & Chinese & Filipino		

### Diagnosis History

Date of Diagnosis	Program Name	Prin	Axis I	Axis II	Axis III	Axis IV	Axis V	Type
10/16/2008	SacCounty-TxCtr-Inpatient	304.5	304.5					A
9/24/2008	TurningPoint-E.Southgate-Focus	299.8	299.8				11	A
6/17/2008	Visions - Franklin - INT	295.7	295.7					A
5/1/2008	Pathways	295.7	295.7		317.	Y	1	A
5/1/2007	Inp. Adult Psych.	309.24	309.24				20	A
5/1/2007	Inp. Adult Psych.	296.33	296.33		E93.92	Y	40	A

### Movement History

Program Name	Admission Date	Discharge Date
SacCounty-TxCtr-Inpatient	10/16/2008	
SAC COUNTY - STOCKTON - LINX	9/25/2008	
Crestwood - Redding - SNF	9/15/2008	
TurningPoint-E.Southgate-Focus	7/24/2008	
ADMIN - TEST	7/24/2008	
Visions - Franklin - INT	6/17/2008	
SacCounty-TxCtr-Inpatient	5/25/2008	6/5/2008
O.P. Adult Psych.	5/22/2008	
Pathways	5/1/2008	
Inp. Adult Psych.	5/1/2007	5/2/2008





# Sacramento County DHHS - Division of Mental Health

## Client Service Report

Client: APOSHIAN, KATHY (44)

Date of Service	Program	Practitioner	Service	Units	Duration	Cost
04/23/2008	Turning Point - 34th Street - Crisis Res	000001 - GIBSON,JANET	600 - Brief Visit	1		50.00
04/24/2008	Turning Point - 34th Street - Crisis Res	000001 - GIBSON,JANET	600 - Brief Visit	1		61.50

Client: BAKER, BILL (1)

Date of Service	Program	Practitioner	Service	Units	Duration	Cost
05/05/2008	Inp. Adult Psych.		401 - Pharmacy 2	1		55.00
05/05/2008	Inp. Adult Psych.	000001 - GIBSON,JANET	401 - Pharmacy 2	1		55.00
05/05/2008	Inp. Adult Psych.	000022 - WILLIAMS,DAWN	301 - Admit Charge Code	1	720	50.00
05/05/2008	Inp. Adult Psych.	000001 - GIBSON,JANET	1000 - Psychiatric Evaluation	1		200.00
05/05/2008	Inp. Adult Psych.	000001 - GIBSON,JANET	1000 - Psychiatric Evaluation	1	200	200.00
05/05/2008	Inp. Adult Psych.	000001 - GIBSON,JANET	1000 - Psychiatric Evaluation	1		200.00
05/05/2008	Inp. Adult Psych.	000001 - GIBSON,JANET	1000 - Psychiatric Evaluation	1		200.00
05/05/2008	Inp. Adult Psych.	000022 - WILLIAMS,DAWN	301 - Admit Charge Code	1	720	50.00
05/05/2008	Inp. Adult Psych.	000001 - GIBSON,JANET	1000 - Psychiatric Evaluation	1		200.00
05/05/2008	Inp. Adult Psych.	000001 - GIBSON,JANET	1000 - Psychiatric Evaluation	1		200.00
05/05/2008	Inp. Adult Psych.	000001 - GIBSON,JANET	401 - Pharmacy 2	1		5.00
05/16/2008	Inp. Adult Psych.	000001 - GIBSON,JANET	1001 - Substance Evaluation	1	15	85.00
10/23/2008	O.P. Adult Psych.	000002 - GREEN,SUE	801 - Adult Group	1		41.67
05/12/2008	Pathways	000002 - GREEN,SUE	PM93010 - Assessment	23	23	56.35
05/12/2008	Pathways	000002 - GREEN,SUE	28010 - Groceries	217	217	217.00
08/26/2008	Pathways	000033 - HURBURT,TRACY	96010 - EVALUATION	30	30	0.00
05/28/2008	SacCounty-TxCtr-Inpatient	000001 - GIBSON,JANET	1035620 - 24 HOUR PHF DAY - M	1	60	489.49
09/11/2008	SacCounty-TxCtr-Inpatient	000002 - GREEN,SUE	IF93010 - ASSESSMENT	120	120	279.60
10/01/2008	SacCounty-TxCtr-Inpatient	000002 - GREEN,SUE	96010 - EVALUATION	60	60	0.00
07/24/2008	Visions - Franklin - INT	000002 - GREEN,SUE	96010 - EVALUATION	28	28	0.00
08/21/2008	Visions - Franklin - INT	000002 - GREEN,SUE	96010 - EVALUATION	120	120	0.00
10/01/2008	Visions - Franklin - INT	000002 - GREEN,SUE	96010 - EVALUATION	50	50	0.00
10/21/2008	Visions - Franklin - INT	000002 - GREEN,SUE	803 - Mature Adult Group	1	30	43.33
07/24/2008	TurningPoint-E:Southgate-Focus	000002 - GREEN,SUE	96010 - EVALUATION	20	20	0.00
08/28/2008	TurningPoint-E:Southgate-Focus	000035 - TESTING,SERVICES	IF93010 - ASSESSMENT	65	65	151.45





# Sacramento County DHHS - Division of Mental Health

## Services Rendered Without Authorizations

Sacramento County DHHS - Division of Mental Health [Services Rendered Without Authorizations]

### Visions - Franklin - INT

For Service Dates Between: 10/24/2007 And: 10/24/2008

Service Code	Service Date	Units	Auth Start Date	Auth End Date	Auth Units	
<b>BAKER,BILL~1</b>						
96010	10/1/2008	50	9/15/2008	9/15/2009	No Limit	Episode 5
803	10/21/2008	1	10/12/2008	10/14/2009	No Limit	
					<b>No Unit Limit Set</b>	<b>51 Units Billed</b>
Service Code(s) Not Authorized						
<b>CONSUMER,IMA MS~96</b>						
96010	8/11/2008	2	8/1/2008	7/31/2009	10 Units	Episode 1
96010	10/21/2008	15	8/1/2008	7/31/2009	10 Units	
					<b>10 Units Authorized</b>	<b>17 Units Billed</b>
						<b>7 Overbilled</b>
Services in Excess of Authorization						
<b>NEWONE,A~101</b>						
96010	8/26/2008	45			No Limit	Episode 1
					<b>No Unit Limit Set</b>	<b>45 Units Billed</b>
No Authorization for Service Date						
<b>TECH,CENTER~110</b>						
96010	9/29/2008	65			No Limit	Episode 4
					<b>No Unit Limit Set</b>	<b>65 Units Billed</b>
No Authorization for Service Date						



# Sacramento County DHHS - Division of Mental Health

## New Authorizations Report

Sacramento County DHHS - Division of Mental Health [New Authorizations]  
For Authorizations Between: 10/23/2007 And 10/24/2008

Client Name	Client ID	Episode	Admission Date	Auth Start Date	Auth End Date
<b>V_Bidwell_OP_Admin</b>					
TECH,CENTER	110	5	9/29/2008	9/29/2008	9/29/2009
<b>Adult Access - Demo (admit)</b>					
TECH,CENTER	110	1	9/29/2008	9/29/2008	9/29/2009
TECH,CENTER	110	3	9/29/2008	9/29/2008	9/29/2009
<b>Terkensha</b>					
BOOPER,BETE F III	94	1	7/27/2008	7/27/2008	7/28/2009
<b>Visions - Franklin - Adult RST</b>					
SERVICES,IWANT	87	1	5/15/2008	5/30/2008	6/1/2009
SERVICES,IWANT	87	1	5/15/2008	5/30/2008	6/1/2009
MACKEY,PAT	107	1	9/16/2008	8/16/2008	9/16/2008
<b>Pretend PreAdmit</b>					
FORUM,USER	109	1	9/25/2008	8/25/2008	11/25/2008
<b>Visions - Franklin - INT</b>					
BAKER,BILL	1	5	6/17/2008	7/22/2008	7/23/2008
BAKER,BILL	1	5	6/17/2008	9/15/2008	9/15/2009
BAKER,BILL	1	5	6/17/2008	10/12/2008	10/14/2009
NELLY,NERVOUS	91	1	7/24/2008	7/24/2008	7/24/2009
CONSUMER,IMA MS	96	1	8/1/2008	8/1/2008	7/31/2009
SERVICE,INEED	98	1	8/19/2008	8/19/2008	8/19/2009
SERVICES,YOUWANT	100	1	8/21/2008	8/21/2008	11/19/2008
<b>SAC COUNTY - STOCKTON - LINX</b>					
BAKER,BILL	1	9	9/25/2008	8/25/2008	11/25/2008
SERVICES,IWANT	87	2	6/1/2008	6/1/2008	12/1/2008
CLIENT,INPATIENT	106	1	9/16/2008	9/16/2008	12/16/2008