

Minutes



DHHS Mental Health – Avatar Implementation User Forum

Date: 11/14/08

Time: 2:30 – 4:00 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	Welcome / Introductions	Tracy Herbert
10	<p>Update on Avatar Implementation Schedule</p> <p><u>UAT</u> User Acceptance Testing (UAT) is being moved back to the week of December 8th. UAT is currently scheduled as follows:</p> <p>Monday- Access Teams, County program staff Tuesday- Contracted Service Providers Wednesday- Treatment Center Thursday- Fiscal Friday- Staff Registration, Scheduling</p> <p>The location at this point will either be the Tech Center Training site, or a facility provided by Senior and Adult Services. Because the SAS site is smaller, we cannot at this time say what the numbers of testers will be.</p> <p><u>Implementation</u></p> <p>Because of the UAT move and other issues that need to be finalized, the Go-Live date is being moved to the first of March.</p> <p>Due to the increased number of users over what was anticipated, training will be scheduled for the 2nd half of January and all of February.</p>	Tracy Herbert
10	<p>Update on User Counts</p> <p>We received original feedback totaling 688 users. That has since been dropped by about 150, but remains higher than anticipated.</p>	Tracy Herbert
30	<p>Avatar Demo</p> <ul style="list-style-type: none">Services Prior to Avatar- a pdf version of what this report will look like was	Kacey

	<p>reviewed. This will be available at Go-Live and will run by Client and program.</p> <ul style="list-style-type: none"> • Scheduling Feature- Appointments can be scheduled by client or by practitioner. This option requires extensive set up ahead of time by the provider including: <ul style="list-style-type: none"> ○ Sites ○ Staff ○ Practitioners ○ Hours/Days of operation • Staff Member Appointment Search- offers a Daily View and a Weekly View. • Client Services Report- modified to remove cost <ul style="list-style-type: none"> ○ During the forum, it was decided to modify this report to show the most recent data at the top. 	Vencill
10	<p>Policy Updates</p> <ul style="list-style-type: none"> • Race and Ethnicity - Avatar tracks CSI data differently than CATS. The end result is that we must enter race and ethnicity data in two places in order to keep being able to know about select races (e.g., Former Soviet). • UMDAP - This has not been resolved yet. • Authorizations - <ul style="list-style-type: none"> ○ The Access Team will open an Access episode to determine service need. ○ They Access Team will then open a new episode under the service provider. ○ The service provider will be able to run the New Authorizations report to see all new authorizations within a timeframe. ○ There can only be 1 Authorization open for a given client at a provider at a time. ○ Existing clients will not require an “authorization” in Avatar at Go-Live, but over the course of the first year, they will all require a new authorization under this process at the time of their re-authorization. ○ New Clients will all require an Authorization in the system ○ Opening an episode requires the listing of an “Assigned Practitioner” for the episode. By default, the Access team will use “Intake Staff” at the time of the episode opening, and the provider can adjust this following their own procedures. • Slot Tracking- <ul style="list-style-type: none"> ○ Providers will still submit Census reports to the Access team ○ Phone calls will still be appropriate • Avatar Transition <ul style="list-style-type: none"> ○ There will be a hard cut off date for entry of services ○ After this cutoff, there will be a period of time where providers will have to hold data entry during the transition ○ After the hold period, all data including that held will be entered into Avatar. ○ There will be very minimal data backdated into CATS. The process for how and by whom this will be completed will be defined prior to Go-Live. 	Tracy Herbert
5	<p>Suggestions for future User Forums</p> <p>Note, the date and time of the next User Forum is December 17th at 3:00</p>	Users

5	<p>Next month's project activities in review</p> <ol style="list-style-type: none"> 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. 2. Bundling We would still like to receive feedback from providers as to which screens would be nice to have as available bundles. 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. 4. Reporting Revisions 5. User Acceptance Testing Currently scheduled to begin the week of December 8th. See the notes above regarding location and scheduling. 	Kacey Vencill
10	<p>Open Forum</p> <p>The following questions and answers were provided at the User Forum:</p> <p>Q. Will providers be able to look at services provided to their clients outside their own cost center? A. This has not been determined yet, but there are PHI concerns to be addressed.</p> <p>Q. Will there still be a "view only password" available like in CATS? A. This will not be necessary, as there is a report available called "Diagnosis and Movement History" which should provide any information that would have been available for this.</p> <p>Q. Where is the ICD9 in Avatar? A. This is the "Principal Diagnosis" field.</p> <p>Q. Will Avatar use military time? A. No, Avatar has an am/pm indicator.</p> <p>Q. Regarding the scheduling option, can more than one service code be scheduled? A. This scheduling tool will only allow for one to be scheduled, but at the time of service entry, multiple services can be included.</p> <p>Q. Can Avatar remember a Clients physician? A. Attending practitioner is a required field on Admission.</p> <p>Q. Can they use the scheduler without having an Avatar UserID? A. No.</p> <p>Q. Will Avatar do away with zip slips? A. It depends on how the data entry process is handled by the providers. Basically all a zip slip does is define data to be entered.</p> <p>Q. Will progress notes still be done by hand?</p>	All

- A. At this time, progress notes are not incorporated into Avatar.
- Q. Can the weekly view of the scheduler be modified to look more like Outlook calendars?**
- A. This is a tool built into the application itself. As such, we do not have the ability to modify the display.
- Q. Will providers be able to import schedule data out of other tools such as Excel into Avatar?**
- A. No.
- Q. Is it possible to get a report of appointments scheduled by site?**
- A. Will have to follow up on this.
- Q. Is it possible to search for appointments by Client?**
- A. Yes.
- Q. If an appointment is cancelled, does the practitioner's time slot open up?**
- A. Yes.
- Q. Can you mark an initial appointment as missed?**
- A. Yes.
- Q. What is happening to CATS IDs?**
- A. They will remain the same in Avatar.
- Q. Will providers be able to look up clients other than by name?**
- A. There are multiple search options including name, Client ID, Claim Number, Social Security Number.
- Q. Will providers be able to look up clients by CIN?**
- A. No.
- Q. Will providers be able to look at all services provided at their site during a month?**
- A. The client services report uses legal entity security. While not specific to site, it would show all services provided under that Legal Entity during a given timeframe.
- Q. Is there a Discharge report?**
- A. Yes.
- Q. What date will be used as the Start Date of services?**
- A. There is a "Provider Begin Date" field which can be entered by the provider on the Additional Episode Information option.
- Q. How long will be defined as the timeframe from an authorization without services before the authorization has to be renewed?**
- A. We are currently looking at 60 days, but that has not been finalized.
- Q. What about services that show up on the "Services Provided Without Authorization" report?**
- A. This concern would be services outside the date range of the authorization.

Next User Forum : 12/17/08, 3:00 – 4:30, 7001 East Parkway, Conf rm 1