"collaboration through innovation"

WUG Meeting Minutes, March 25, 2009

Introductions:

FEI:	Sarah Moore, WUG Coordinator
	Marion Sarhy
	Ludwing Najera
	Becky Kinney
	Lee Keitz
	Deeksha Garg
SLCo:	Cory Westergard
Hawaii:	Steve Okano
San Diego:	Paula Martinez
	Alice McLennan
Alaska:	Michael Walker
Mendocino:	Heidi Weir

Announcements:

- A forum will be launched on the website in order to allow for discussion tracking and feedback from members.
- There are at least two different types of items we'll be addressing as a group- bugs and developments that are already funded and approved; and items that are conceptual, which means that an item has been identified, but resolution and funding are not certain.
  - Approved items will require prompt feedback so that action can be taken. Once a preliminary plan of action is approved, a feedback period of 5 days will begin. If there are no objections to the preliminary plan of action, it will be implemented.
  - Conceptual items will have a longer discussion period, and may not result in action. There will be feedback deadlines for these items as well, but this will vary depending on the item.
- No additional items for discussion were submitted by WUG members prior to today's meeting. We believe that customers do have questions and discussion points, and the WUG format was designed to facilitate those conversations in order to find resolution. We encourage you to take advantage of that format and submit your items to wug@feinfo.com, preferably at least a week before the next meeting.

Agenda:

1. Items carried from last meeting:
   - *Consented activity headers (fast track item)* :
     - i. Two examples were shown: Miscellaneous Notes and Encounter Notes
     - ii. Proposed to include client name and client ID- no objections.

1. Client ID would be the Client ID from the consenting agency, not the consented to agency.
2. Will be posted as pending solution. WUG members will have 5 business days to voice concerns or objections.

iii. This solution would apply to every consented activity currently formatted in html (not pdf) and excepting the ASI for SLCo.

- *List of Clients with Consents from Outside Agencies (conceptual item)*:
  - i. Original item was related to the fact that this list continues to grow and becomes unwieldy. Discussion identified three separate issues.
    1. Consents created in error that should probably be deleted
       - a. Group proposed an administrator-only right to delete a consent and associated consented activities in certain circumstances.
         - i. Would need to carefully define those circumstances.
    2. Managing the length of the list and allowing for additional filters
       - a. Suggestion was made to have all filters available on client search screen also apply to Clients with Consents list. However, this is already being done to the extent possible. Because the client records in the Clients with Consents list are not the same client records in the Client list, it is not possible to filter the Clients with Consents list on fields such as primary care staff, or case status.
       - b. Solution 3.a.ii below would also address this concern.
    3. Security concerns- currently any staff person with access to client profile can view any consented client activity.
       - a. Potential Solutions:
         - i. New staff role that would restrict access to the list of clients with consents from outside agencies.
           - This solution would only address the security issue, and that only to a certain extent.
         - ii. A new "Consents In" screen that works much like the "Referrals In" screen works now. This would allow consents to be accepted and linked to a client record within the "Consented To" agency. The consent would then become an activity for the client. Security restrictions that apply to client records would then apply to consented records as well.
           - This solution would address both the manageability of this list as well as security concerns.
           - Concern that when the consent is revoked, the consented activities shared under that consent still show up on the consented to agency.
             - This is appropriate if the consent was given for the correct client, and the consented activities are only those that occurred between the date of the consent and the date of the revocation.
             - This is not appropriate if the consent was given for the wrong client entirely. In this case, there would need to be the ability to remove the link to the

wrong client profile and either delete that consent or link it to the correct client profile.

- Paulina (SD) asked what would happen if a consent were accepted for a client that did not yet have an intake?
  - Potentially this would then start a new intake, much like the referral does now. We would need to determine if there is a valid reason to review consented records without the client getting an intake, and if so, how to manage that situation.
- Cory (SLCo) asked about the connection between the consent and referral in this scenario- would the acceptance of a consent then keep you from deleting a referral for that client? They don't want to get "stuck" with that referral record if it's not valid. It doesn't seem that there would need to be a rule prohibiting action on one based on the other.
- Alice (SD) stated that they would like to see how it works on a training site. Would want to see proposed requirements and have a chance to see how it would fit into their process.
  - FEI cannot build a module for review, but we can create a mock-up document that could shape the conversation about requirements and business flows. We will create this.

2. Items submitted for this meeting:
   - None submitted.

Closing Thoughts & New Topics:

1. Alice (SD) requested a list of the fields available in base WITS.
2. Cory (SLCo) also requested a list of core modules and fields :data dictionary
   Since FEI does not have a readily available field list or data dictionary, we will be working on a solution that we can produce in a reasonable time frame.
3. Group Notes:
   - Steve (HI) would like to see the facility associated with the program enrollment on the Group Note Roster. No objection was voiced by the group, as long as functionality was not impacted.
   - Attendees also agreed that a way to filter the list of clients available in the client name dropdown field would be helpful.
4. Cory (SLCo) noted that there are screens on which you can tab to the action buttons, and some screens where you can't. They would like it to be consistent (with tabbing) on each screen.